# OSAS Web B2B

OSAS 7.6 User Guide











OSAS Web B2B

Version 7.6

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This document has been prepared to conform to the current release version of OPEN SYSTEMS Accounting Software. Because of our extensive development efforts and our desire to further improve and enhance the software, inconsistencies may exist between the software and the documentation in some instances. Call your customer support representative if you encounter an inconsistency.

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**CHAPTER 1** 

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## Introduction

#### **Welcome to OSAS**

Welcome to the OSAS Web B2B application for OPEN SYSTEMS Accounting Software<sup>®</sup> (OSAS<sup>®</sup>). OSAS Web B2B allows your customers to access selected information from your OSAS data files with any web browser. Your customers can also use the OSAS Web B2B system to enter sales orders into your system through the Internet.

OSAS Web B2B is different from other OSAS applications because of the web interface. It helps to think of the software as two pieces that are joined together—the web server application and the OSAS application.

OSAS Web B2B plugs into Resource Manager, the foundation of OSAS. Consult the Resource Manager guide for more information on basic OSAS functionality and details on how Resource Manager works within the OSAS system.

#### **About This Guide**

This guide describes the functions that make up the OSAS Web B2B application and gives details on how OSAS Web B2B fits into your existing business workflow. This guide is divided into these sections:

- Chapter 1 introduces OSAS and the OSAS Web B2B application, and describes the basics of the OSAS Web B2B system and how to navigate around OSAS.
- Chapter 2, Installation and Conversion, details how to install OSAS Web B2B using Resource Manager and how to create or convert the data files it requires.
- Chapter 3, Getting Started, gives information and checklists on the steps you need to perform to set up OSAS Web B2B.
- Chapters 4 through 12 contain function descriptions organized by menu. These chapters mirror the order that appears on the OSAS Web B2B menu.
- The Appendixes contain supplimentary material not directly related to OSAS Web B2B functionality.
- The Index is a topical reference to the information in the rest of the chapters, and concludes this guide.

#### Conventions

This guide uses the following conventions to present information.



When the **Inquiry** or **Maintenance** commands (or both) are available for a field, the Inquiry and Maint flags appear in the margin. See page 1-20 and page 1-24 for more information on these commands.

When you see the phrase "use the **Proceed** (**OK**) command" in this guide, press **Page Down** in either text or graphical mode to continue. In graphical mode, you can also click **OK** to proceed.

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## The OSAS Web B2B System

**B2B** is a software industry term that describes web-based systems that facilitate business-to-business transactions. OSAS Web B2B is just such a system. You can use the OSAS Web B2B application to allow your customers access to selected information from your OSAS data files with any web browser. Your customers can also use the OSAS Web B2B system to enter sales orders into your system through the Internet.

You must have Internet access and Internet server software in addition to OSAS Web B2B. The Internet server software you use must support **Standard CGI** scripting in order to use it with OSAS Web B2B.

**Note:** CGI is an acronym for Common Gateway Interface, a method of communicating information from one web page to another. There are two types of CGI scripting standards: Windows CGI and Standard CGI. OSAS Web B2B uses Standard CGI.

A familiarity with **HTML** (Hypertext Markup Language) is recommended if you want to modify the web pages constructed by the **Create OSAS Web B2B Login Page** and **Install Web Server Components** functions.

OSAS Web B2B is different from other OSAS applications because of the web interface. It helps to think of the software as two pieces that are joined together—the web server application and the OSAS application.

### OSAS Web B2B on the Web Server

The web server application is the part of OSAS Web B2B that your customers see. It is a connected group of HTML screens, some of which function as menus, and others that display and prompt for information. These screens communicate with OSAS Web B2B using standard CGI scripts.

Your Internet server software must be installed and configured on the web server before you can use OSAS Web B2B. The web server can be located on the same computer on which you run OSAS, or it can be located on a different computer. If you choose to use a different computer for a web server, you must be able to communicate between your OSAS system and the web server through a network or modem connection.

The web server and OSAS must be able to communicate because OSAS Web B2B provides several functions that move data files and programs from OSAS to the web server and back again.

If you run your web server on a different system than OSAS, and the two systems cannot communicate directly, you will need to move these files and programs manually using software designed for that purpose, such as FTP (File Transfer Protocol) software.

For details about the HTML screens used with OSAS Web B2B, see chapter 8.

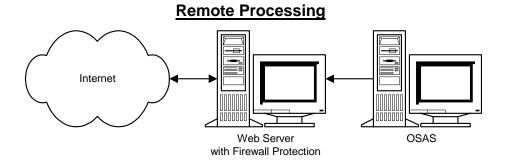
#### OSAS Web B2B Functions in OSAS

The OSAS side of OSAS Web B2B includes several functions that you use to set up and maintain the web server side, including:

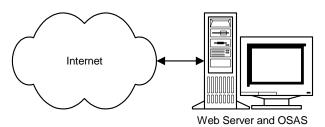
- creating your login page
- determining which inventory items are accessible
- granting access to your customers by assigning them passwords
- moving information between your OSAS system and the web server

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### Local and Remote Processing



### **Local Processing**



You can control how the data on your system is accessed when you set up OSAS Web B2B. You have two options regarding data access, *local processing* and *remote processing*.

Local processing allows direct access to your data files. This method provides the most timely information to your customers and is easy to set up and maintain.

Remote processing allows access only to copies of your data files. Remote process is more secure, allowing you to isolate the web server—and Internet users—from your other accounting data.

The method that you choose determines the tasks you need to perform to maintain the OSAS Web B2B system.

#### OSAS Web B2B Menu Structure

The OSAS Web B2B menu structure is similar to the structure of other OSAS applications: functions appear roughly in order of use.

#### **Sales Order Processing**

Use the functions on the **Sales Order Processing** menu to process and track the orders entered through the web server. You can produce a list of new orders and purge the order log. You can also copy the orders to your OSAS data files if you are using remote processing.

#### **Remote Access**

Use the functions on the **Remote Access** menu to copy data files and programs to the web server if you are using remote processing.

#### **File Maintenance**

Use the functions on the **File Maintenance** menu to establish groupings for Inventory item display, to add references to graphical pictures of items, and to set up and establish access to your item and customer information.

#### **Setup OSAS Web B2B Components**

Use the functions on the **Setup OSAS Web Components** menu to create your Web Login Page based on the criteria you set up through the File Maintenance functions, and to install the OSAS Web components on your web server.

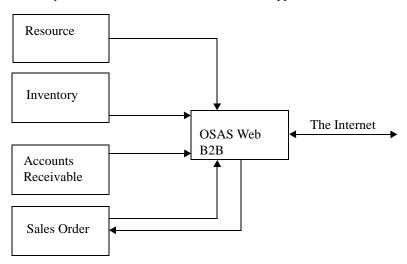
#### **Master File Lists**

Use the functions on the **Master File Lists** menu to produce listings of the information you entered using the File Maintenance functions. Use the lists to verify your entries or for future reference.

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#### **Application Interaction**

OSAS Web B2B is an application that translates your OSAS data into fields accessible through the Internet. The information available for access comes from the Inventory, Accounts Receivable and Sales Order applications.



OSAS Web B2B's application interaction means that the information you enter in one application can be transferred to, and used in, other applications. This process reduces data entry time and the number of errors that might creep in along the way.

OSAS Web B2B uses data from Inventory, Accounts Receivable, and Sales Order, displaying this data to users on the Internet requesting the information from your web server. In return, sales orders entered through OSAS Web B2B update your Sales Order files.

You can control which files and data are available to Internet users.

## Starting OSAS

OSAS runs on an operating system supported by 150 MB of permanent storage and 4 MB of RAM. You may need additional space or memory, depending on the size of your data files and the operating system you use. Consult your reseller for more information.

#### In Windows

To start OSAS on a computer running Windows, double-click the OSAS shortcut on the desktop or access the program from the **Start** menu.

#### In Other Operating Systems

To start OSAS on an operating system other than Windows, enter osas at the operating system prompt. If your operating system has graphical capabilities, you can also use the OSAS shortcut to start OSAS.

## Using Parameters

You can use the -u, -c, and -t parameters in OSAS shortcut properties or after the **osas** command so that the system automatically uses the appropriate user ID, and company ID to save time logging in.

In Windows, open the OSAS shortcut's properties and enter these parameters after the path in the **Target** field (as in the example below; be sure to use the correct directories for your system).

C:\basis\bin\bbj.exe osasstrt.txt -q -tT00 -cD:\osas70\progrm\config.bbx - - uSam -cH

**Note:** In Windows, the **-u** and **-c** parameters must follow the separation dash.

In other operating systems, enter the parameters after the osas command, as in this example:

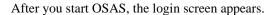
osas -t T2 -c B

**Note:** You can enter these parameters in any order, but you must leave a space between the parameter mark (-t or -c) and the parameter itself.

Refer to the Resource Manager guide for more information on these parameters.

CHAPTER 1 • Introduction Starting OSAS

### Logging In





To log in to OSAS, enter your **User ID**, the **Company ID** you want to work with, and your **Password**. If you want to save your password so that you do not need to enter it again, select the **Save Password?** check box (or enter **Y** in text mode) to save your information. This check box appears only if the **Remember Password?** option is selected for your user ID in the **Users** function in Resource Manager.

Check the **Change Password?** box to change your password upon logging in. You will be prompted to enter and confirm your new password.

Finally, press  ${f Enter}$  or click  ${f OK}$  to log in.

This screen appears only after you have set up the system, including setting up users. See the *Resource Manager User's Guide* for information on setting up users and roles.

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#### Roles

Roles limit use of the system and protect sensitive information. Each role allows access to specific applications, menus, and functions. If you cannot select a menu or function, your assigned role is not authorized for it. Use the **Roles** function in Resource Manager to set up roles.

### **Workstation Date**



To change the workstation date, select **Workstation date** from the **File** menu, click the **Change Date** button on the toolbar, or press **F6**.



When the Workstation Date box appears, use the button or your keyboard to enter the date and press **Enter**.

## **Navigating OSAS**

OSAS menus and functions are available in two modes: graphical and text. The graphical mode allows both keyboard and mouse commands and uses data entry fields and buttons similar to those found in any graphical software program. The text mode presents information in a simpler text format and uses keyboard commands to access functions and move around the screen. If you use an operating system that does not have graphical capabilities, the text mode is the only mode available.

You can use either text or graphical function screens indepently of the main menu. For example, you can use text function screens while using the graphical main menu, and vice versa. Select **GUI Functions** from the **Modes** menu or press **Shift+F6** to toggle between the text and graphical modes for function screens.

When available, press **Shift+F5** to switch between graphical and text menu modes, or press **Shift+F6** to switch between modes on function screens. You can also use the Resource Manager **Defaults** function to select the default mode to use for the main menu and function screens.

In text mode, use the **Page Up**, **Page Down**, arrow, and **Enter** keys to move between menus, select and enter functions, and move around function screens. When a list of commands appears at the bottom of a function screen, press the highlighted letter to use a command. These methods also work in graphical mode, or you can use the mouse to click on fields and command buttons.

## **Graphical Mode**

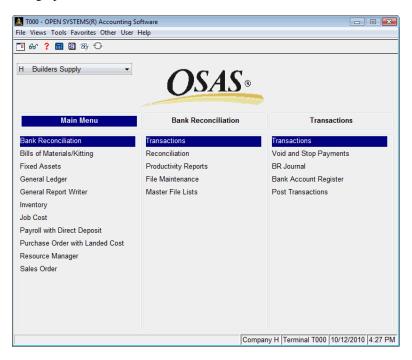
If you're familiar with other graphical software programs, you'll find it easy to navigate around the OSAS graphical mode, which uses buttons, toolbars, text entry boxes, and menus to help you move through your tasks.

#### Main Menu

If you use BBj in graphical mode, the main menu is available in two flavors: graphical and MDI. To switch between the two styles, press **Shift+F5**. If you use Visual PRO/5, the graphical main menu is the only graphical menu available.

#### Graphical Main Menu

The graphical main menu is shown below.



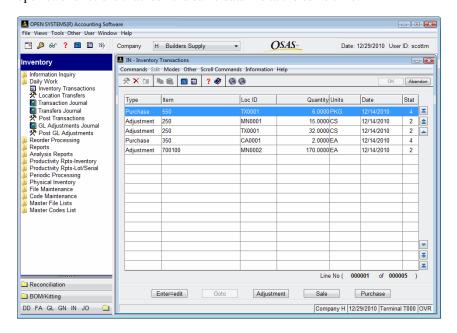
You can move around the graphical menu in these ways:

- Click an application to view that application's menu. Click a menu item to view its functions. Double-click a function name to enter that function.
- To exit from the graphical menu, click a different application or menu name or press **Tab** to return to the main menu.
- To exit from OSAS, click the **Close** box in the upper-right corner of the screen, press **F7**, or select **Exit** from the **File** menu.

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#### MDI Main Menu

The MDI menu centralizes all OSAS functionality in one location: applications appear as tabs at the top of the screen, their menus and functions appear in a navigation pane on the left side of the screen, and function screens appear in the large pane on the right. Using this menu, you can open more than one function screen at a time and move or minimize screens as needed. However, you cannot open two functions that lock the same data file at the same time.

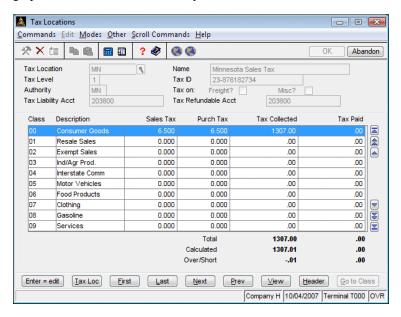


You can move around the MDI menu these ways:

- To view an application's menus, click that application's tab.
- To view the functions a menu contains, click the menu name. The menu expands to list the functions it contains. Click the function name to enter the function. The function screen appears in the right pane.
- To exit from a menu, click a different menu name or application tab. To exit from OSAS, click the Close box in the upper-right corner of the screen, press F7, or select Exit from the File menu.

#### **Function Screens**

Graphical screens contain the same functionality as text screens, presented in a graphical format that includes easy access to commands via the mouse.



You can move around the screen in these ways:

- Use the mouse or press **Tab** to move from field to field. Use the scroll buttons to move from line to line in scrolling regions.
- If a screen appears prompting for the kind of information to enter or maintain (such as on File Maintenance or Transactions screens), select the appropriate option and click **OK** to continue.
- Press Page Down if prompted to move to the next section.
- Click **Header** when it appears to return to the screen's header section.
- Press **F7** to exit the screen and return to the main menu.

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#### Menus

Both the graphical main menu and graphical function screens contain drop-down menus that give you access to additional commands without using the function keys. While you can use the function keys to access commands in graphical mode, you may find it easier to access command through these menus.

To access a menu's commands, click a menu title. The commands for that menu appear, followed by any associated hot key combinations in brackets < >. To use a command, click the command name or press the hot key combination.

Refer to the Resource Manager guide for more information on the menus available in OSAS and their commands.

#### Shortcut Menu

OSAS gives you quick access to commands relating to the screen you're using via a shortcut menu. The commands that are available depend on the function and the field you are currently using. To use these commands, click the right mouse button and select the command from the menu that appears.

On the main menu, the shortcut menu gives you access to commands that help you manage your **Favorites** menu, switch between sample and live data, perform certain setup tasks, and view function information. On function screens, this menu helps you access help documentation, move around the function screen, work with EIS dashboards, and so on.

#### Other Commands Menu

The **Other Commands** (or **F4**) menu is available on both graphical and text menu and function screens and gives you access to additional utilities and commands not directly related to the function you're currently using. Among other things, these commands open calculators or allow you to view or enter additional information. In text mode, press **F4** twice on the menu or once on function screens to access this menu.

Consult Appendix A in the Resource Manager guide for more information on the commands available on the **Other Commands** menu.

#### Information Menu

The **Information** (or **Shift+F2**) menu is available in some graphical or text function screens in certain applications and gives you access to additional information about a customer, vendor, item, job, bill of material, or employee. The commands available on the **Information** menu are determined by the applications you have installed, and can include:

- General Information
- Comments
- History
- Documents
- Address Lookup

Not all of the commands above appear on every **Information** menu; instead, commands are available only as they are relevant to the task you are performing. For example, if you are entering a transaction in Accounts Receivable, you can access comments or documents about items or customers but not about employees or vendors.

Consult Appendix A in the Resource Manager guide for more information on how to use the functions on the **Information** menu.

#### Favorites Menu

The **Favorites** menu gives you quick access to the OSAS functions you use most by allowing you to add selections for entire menus or particular functions to a custom menu. After you've set up the menu, select **Change to Favorites** from the graphical **Favorites** menu or press **F2** to access the functions.

The **Favorites** menu saves you time by eliminating the need to switch between applications. You can add functions from several different applications to the **Favorites** menu and access them all there rather than switching between applications on the main menu to access the functions you need.

To add a function to the **Favorites** menu, select the function you want to add and press **F10**. Press **F2** to switch to the **Favorites** menu to confirm that your selection was added.

To remove a function from the menu, select the function on the **Favorites** menu that you want to remove and press **F10** again.

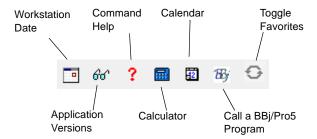
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#### **Toolbars**

As with menus, graphical screens also contain toolbars that give you fast access to the most frequently used OSAS commands. The toolbar for the main menu differs slightly from that of function screens.

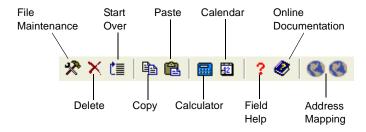
#### Main Menu Toolbar

The toolbar for the main menu is shown below. Click a button to access that command.



#### Function Screen Toolbar

The toolbar for function screens is shown below. Click a button to access that command.



#### **Date Fields**



If you use BBj in graphical mode, click the **Calendar** button when it appears next to date fields to open a calendar so that you can select the date you want to enter into that field.

#### **Browse**



If you use BBj in graphical mode, you can use the **Browse** button when it appears next to fields to navigate to directories and files and automatically enter file paths into that field. Click the **Browse** button to open the Select Directory/ File screen, then navigate to the directory or file and click **Open** to automatically enter the file path in the field.

#### Inquiry



The Inquiry command helps you look up and select valid entries for fields that are connected to master file records. For example, when you use the Inquiry command in a **Batch ID** field, OSAS lists all batches you have set up so that you can select the one you want to enter in that field. When the **Inquiry** button appears next to a field, you can either click the button or press **F2** to open the Inquiry screen and search for valid entries.

#### **Maintenance**



The Maintenance command allows you to enter or edit master file records on the fly from within functions. For example, you can use the Maintenance command to add a new customer or item from within the **Transactions** function. The Maintenance command is available when the **Maintenance** button appears on the toolbar. Click the button or press **F6** to open the File Maintenance function associated with that field and enter or edit a new master file record.

#### **Address Mapping**



When you are working with a screen that contains an address, you can use the **Address Mapping** command to view a map of that address. This command combines address information with the URL and search variables in the Resource Manager **Web Setup** function and the **Map Lookup ID** in the **Company Setup** function to direct your web browser to a mapping website and generate the map.

**Note:** Before you can view maps, you must set up mapping website information in the Resource Manager **Web Setup** function, select the **Map Lookup ID** to use in the Resource Manager **Company Information** function, and enter the path to your workstation's web browser in the Resource Manager **Defaults** function.

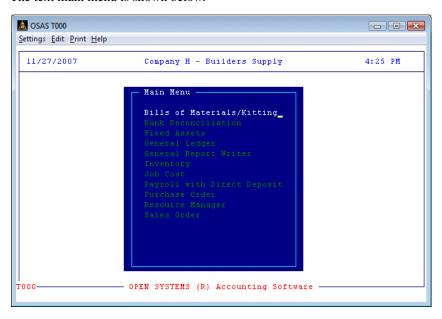
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#### **Text Mode**

The OSAS text mode is available on all operating systems. If you use OSAS on an operating system that does not have graphical capabilities, the text mode is the only mode available. In text mode, all screens are presented in an easy-to-use textual interface that you navigate through using keyboard commands.

#### Main Menu

The text main menu is shown below.



When you select an application, the application's menu is superimposed over the main menu. Selecting an entry on an application menu opens a function screen or a submenu.

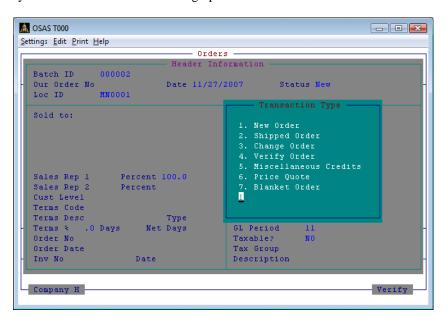
You can move around the text main menu in these ways:

• Use the arrow keys to move the cursor up and down to highlight the application you want. Then press **Enter** to select it.

- Press the first letter of the application you want to move the cursor to the
  first application beginning with that letter. Continue to press the letter key or
  the down arrow until the application you want is highlighted, then press
  Enter to select it.
- Use the mouse to click an application to view that application's menu.
- To move to the first application on the menu, press **Home**. To move to the last application on the menu, press **End**.
- On an application menu, press Page Up to move to the menu immediately behind it. If you are several levels away from the main menu, you can return to the main menu by pressing Page Up repeatedly or by pressing Tab once.
- To exit from OSAS, press **F7**.

#### **Function Screens**

Like the text menu, OSAS text function screens can be used on all operating systems and in combination with graphical menus.



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You can move around the screen these ways:

- Press **Enter** or the down arrow to move from field to field.
- To use a command that is listed in the command bar, press the highlighted letter.
- Use hot key commands to access information screens or to toggle commands on and off. Refer to Appendix B in the Resource Manager guide for more information on these commands and their corresponding hot keys.
- If a screen contains more than one section, press **Page Down** when prompted to move to the next section.
- If a menu appears prompting you for the kind of information to enter or maintain (such as in the example and on Transaction and File Maintenance screens), select the appropriate option and press **Enter**.
- To exit the screen and return to the menu, press **F7**.

#### Menus

Like the graphical mode, the text mode also includes menus that give you access to commands that open additional utilities, show additional information about the task at hand, or set up a custom menu that contains frequently-used commands.

Refer to Appendix A in the Resource Manager guide for full details about the menus available in OSAS.

## Other Commands

The **Other Commands** (or **F4**) menu gives you access to additional utilities and commands not directly related to the function you're currently using. In text mode, press **F4** twice on the menu or once on function screens to access this menu. See page 1-17 for more information on this menu.

#### Information Menu

The **Information** (or **Shift+F2**) menu gives you access to additional information about a customer, vendor, item, job, bill of material, or employee. In text mode, this menu is available when the Info flag appears at the bottom of a function screen.

The commands on the menu are available only as they are relevant to the task you are performing. For example, if you are entering a transaction in Accounts Receivable, you can access comments or documents about items or customers but not about employees or vendors. See page 1-17 for more information.

#### Favorites Menu

The **Favorites** menu allows you add the OSAS menus or functions you use most frequently to a custom menu. After you've set up the menu, select **Change to Favorites** from the graphical **Favorites** menu or press **F2** to access the functions.

To add a function to the **Favorites** menu, select the function you want to add from the main menu and press **F10**. To remove a function from the menu, select the function on the **Favorites** menu that you want to remove and press **F10** again. See page 1-18 for more information on this menu.

#### **Commands and Flags**

Both the text menu and text function screens let you use commands to drill down to more information, change companies, switch to sample data, and perform tasks related to the function you are using. These commands are analogous to the commands contained on drop-down menus in graphical mode.

You access commands by pressing the hot key combination for the command you want to use. If you're working with a keyboard that lacks function keys (labeled with an **F** followed by a number) or if you're working with an emulator in UNIX (which can cause function keys to become unavailable), press the appropriate alternate key combination to access the command.

Refer to Appendix B in the Resource Manager guide for a list of all OSAS commands and their associated hot keys.

Not all commands are available for every function or field; when a command is available, a flag appears at the bottom of the function screen. Common flags include **Quick**, **Info**, **Maint**, **Inquiry**, and **Verify**.

- The **Quick** flag reminds you that you are using the Quick Entry mode to skip fields that are not required. Press **Ctrl+F** to toggle quick entry on and off.
- When the Info flag appears, press Shift+F2 to access the Information menu
  to access additional information about a customer, vendor, item, job, bill of
  material, or employee. See page 1-17 for more information on this menu.

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Maint

• When the **Maint** flag appears, press **F6** to launch the appropriate File Maintenance function to edit a master file record or enter a new one "on the fly." When you finish, press **F7** to return to the function you were using.

Inquiry

- When the **Inquiry** flag appears, press **F2** to use the **Inquiry** command to look up additional information and select valid entries for the field you are in.
- The Verify flag reminds you that you are using verification. When this flag
  appears, you must provide verification when you press Page Down or use
  the Proceed (OK) command. Press Ctrl+V to toggle verification on and off.

#### **Command Bar**

The command bar appears at the bottom of function screen and gives you access to commands that allow you to move around the screen, add or edit information, change settings for selected lines, or select output devices.

```
Enter = edit, Append, Header, Totals, View, Online, Next trans
```

The commands that are available depend upon the function you are using, and are analogous to the command buttons available on graphical screens. Press the highlighted key to use a command.

#### Messages

Messages appear at the bottom of the screen when a command is unavailable or when OSAS needs information to continue.



#### **Address Mapping**

When you are working with a screen that contains an address, you can use the **Address Mapping** command menu to view a map of that address. This command combines address information with the URL and search variables in the Resource Manager **Web Setup** function and the **Map Lookup ID** in the **Company Setup** function to direct your web browser to a mapping website and generate the map.

The **Address Mapping** command is available when the **Map** flag appears at the bottom of the screen. To view a map of the first address on the screen, press **Shift+F4**. To view a map of the second address (if present), press **Shift+F5**. The second command is not available when there is only one address.

**Note:** Before you can view maps, you must set up mapping website information in the Resource Manager **Web Setup** function, select the **Map Lookup ID** to use in the Resource Manager **Company Information** function, and enter the path to your workstation's web browser in the Resource Manager **Defaults** function.

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## Reports

OSAS applications contain a variety of reports that help you make the best decisions for your business. With reports, you can view transaction summaries, print audit trails of activity managed through OSAS functions, make lists of your basic master file information for reference, and analyze all aspects of your company's cash flow.

This section summarizes the basics of using reports. For detailed information on a specific report, see that report's description in the appropriate section.

### Selecting a Range of Information

To produce a report, you must specify what information you want to include in the report.

- To produce a report that includes all information available, leave the From-Thru fields on the report screen blank. For example, if you want to include information about all the vendors you work with in a report, leave the Vendor ID From and Thru fields blank.
- To limit the amount of information in the report, enter a range in the **From-Thru** fields. For example, if you want a report to include information only about vendor ACE001, enter **ACE001** in both the **Vendor ID From** and **Thru** fields. If you want the report to include information only about vendors that start with CO, enter **CO** at **From** and **COZZZZ** at **Thru**.
- You can also select the **Tag** check mark next to a selection to select a noncontiguous range of information. In fields where you've tagged individual choices, the selection will appear as an asterisk in the From/Thru fields after the selection.

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Each field where you enter information on a report screen usually restricts the overall output of the report. For example, if you leave the **Vendor ID From** and **Thru** fields blank, the report contains information about all the vendors. But if you enter invoice **100** in the **Invoice Number From** and **Thru** fields, and invoice **100** is assigned only to vendor ACE001, the report includes information only about vendor ACE001.

### Sorting

Information for reports is sorted first by a space (\_), then by special characters, then by digits, then by uppercase letters, and finally by lowercase letters. No matter what you enter in the **From** and **Thru** fields, however, your entries are sorted in alphabetical order (unless the function provides an option to sort the information differently).

Sorting by alphabetical codes or IDs is easy. For example, the ID **ACL** comes before the ID **BB** because A comes before B.

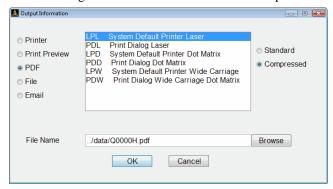
Use caution when you enter codes or IDs consisting of characters other than letters; the order might not be what you expect. For example, if 20 items are labeled 1 through 20, and all are included in a report, you might enter 1 at From and 20 at Thru, expecting them to be listed 1, 2, 3... 19, 20. However, since OSAS sorts in alphabetical order, rather than numerical order, the numbers are listed in this order: 1, 10–19, 2, 20. In this example, numbers 3 - 9 are not included in the sort since they fall after 20 in an alphabetical sort. To prevent this situation, pad extra spaces in codes and IDs with zeros so that numbers in alphabetical order are also in numerical order. In the example above, the items could be labeled 000001 through 000020.

## **Outputting Reports**

You can output reports in a variety of ways, but keep in mind that the mode you use controls which output options are available to you. If you use graphical function screens, you have the following output options: **Printer**, **Print Preview**, **PDF**, **File**, or **E-mail** (for selected reports). If you use text function screens, you have these options: **Printer**, **File**, **Screen**, or **E-mail** (for selected reports).

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If you use graphical screens, the Output Information dialog box appears after you select the range of information to include in the report.



If you use text screens, these options appear at the bottom of the screen after you select what to include in the report and how to organize it.



#### **Print the Report**

Follow these steps to print a report:

- 1. Select **Printer** (in graphical screens) or enter **P** (in text screens).
- 2. If multiple printers are available for the terminal, either select the printer from the list or enter the appropriate code for the printer and press **Enter**.

Use the **Devices** function in Resource Manager to add printers to the terminal.

- 3. When available, select either **Standard** (or enter **S**) to print the report in standard width or **Compressed** (or enter **C**) to print it in compressed width.
- 4. Click **OK** or press **Enter** to begin printing the report.
- 5. If you want to stop printing after it has begun, press Ctrl+Break.
- 6. Click **OK** or press **Enter** to continue.

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#### **Preview the Report**

The Print Preview option is only available for graphical workstations. However, before Print Preview will work in Windows, you must add a **sysprint** device line in the **config.bbx** file for that workstation. Use the **Devices** function on the Resource Manager **User Setup** menu to add this line.

Follow these steps to view a report using Print Preview:

- 1. Select **Print Preview** (in graphical screens).
- 2. If multiple printers are available for the terminal, either select the printer from the list or enter the appropriate code for the printer and press **Enter**.

Use the **Devices** function on the Resource Manager **Installation and Configuration** menu to add printers to the terminal.

- 3. Click **OK** or press **Enter** to continue.
- 4. When available, either select **Standard** or enter **S** if you want to view the report in standard width or select **Compressed** or enter **C** if you want to view it in compressed width.
- 5. Press **Enter**. The **Print Preview** screen displays the report as it will look when printed out in hard copy.
- 6. To print from this screen, select **Print** from the **File** menu. To exit from this screen, select **Exit** from the **File** menu.

#### Save the Report as a PDF

PDF output is available for OSAS systems using BBj. The data path set up for the workstation in the **Preferences** function appears. If necessary, enter a new data path or click the **Browse** button to navigate to the correct directory, then enter the file name followed by the **.PDF** extension. The file name plus extension that you enter must be less than 35 characters. Press **Enter** to save the report as a PDF file in that directory.

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To save the report as a text file, select **File** or enter **F**. The data path set up for the workstation in the **Preferences** function appears. If necessary, enter a new data path or click the **Browse** button to navigate to the correct directory, then enter the file name followed by the .txt extension. The file name plus extension that you enter must be less than 35 characters. Press **Enter** to save the report in that directory.

**Note:** To preserve spacing and formatting, view text file reports with a fixed-width or monospaced font (Courier, Letter Gothic, or Lucida Console, for example).

#### View the Report on Screen (Text Screens Only)

If you use text screens, you can view selected reports directly in the OSAS screen. Keep in mind that this option displays the report one page at a time, storing previously viewed pages in the workstation's memory. Use the **Preferences** function on the Resource Manager **User Setup** menu to limit the number of screen pages you can view to conserve memory resources.

Follow these steps to view the report on screen:

- 1. Enter **S** to select **(S)creen**.
- 2. When available, enter **S** if you want to view the report in standard width or **C** if you want to view it in compressed width.
- 3. When the report appears, press **Enter** to view the next page or **Page Up** to view previous pages.

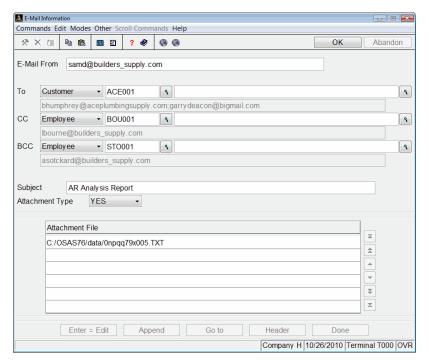
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#### E-mail the Report

Before you can e-mail reports, you must enter details about your e-mail system using the **E-Mail Setup** function on the Resource Manager **Installation and Configuration** menu. You can e-mail only selected reports. In general, any report or form that makes up part of your audit trail cannot be e-mailed.

Follow these steps to e-mail a report:

1. Select **E-mail** or enter **M**. The **E-Mail Information** screen appears.

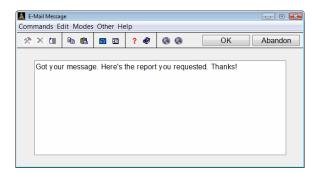


2. The **E-Mail From** field displays the originating e-mail address. Change it if you want the return e-mail address to be different from the one set up in the **E-Mail Setup** function in Resource Manager.

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#### Inquiry

- 3. In the To, carbon copy (CC), and blind carbon copy (BCC) fields, select Other and enter the e-mail address, or select Vendor, Customer, or Employee and choose from the e-mail addresses on file for those respective categories (depending upon installed applications), or select None to leave the field blank (you must choose at least one To, CC, or BCC address).
- 4. The name of the report appears in the **Subject** field. Change the subject line, if necessary.
- 5. Select **Yes** in the **Attachment** field to send the report as a text file attachment to the e-mail message, select **No** to send the report in the body of the e-mail, or select **PDF** to attach the report as a PDF file.
- 6. The E-Mail Message dialog box appears.



Enter the message you would like included in the body of the e-mail, and use the **Proceed** (**OK**) command. You are returned to the E-Mail Information Screen.

- 7. Use one of the following commands in the Attachment File scroll region:
  - Press Enter to edit the highlighted attachment (if any). Browse to or
    enter the name of the file you would like to attach in the Edit
    Attachment dialog box (see "Edit/Append Attachment dialog box" on
    page 1-34).
  - Press **A** to add an attachment to the e-mail. Browse to or enter the name of the file you would like to attach in the **Append Attachment** dialog box (see "Edit/Append Attachment dialog box" on page 1-34).

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- Press **G** to go to a specific attachment line item (this command is only available if there are more than six attachments to the e-mail).
- Press H to change the header information of the e-mail, including the E-Mail From field, the recipient(s), the subject line, and the attachment type.
- Press **D** when done entering the e-mail information, and you are ready to process the e-mail.
- 8. If you choose **No** in the **Send E-Mails Immediately?** option in the Resource Manager Options and Interfaces (see "Options and Interfaces List" on page 3-47), the e-mail will be held in the E-Mail Queue for processing (see "E-Mail Queue" on page 3-49). Otherwise, the e-mail will be sent immediately.

**Note:** To preserve formatting, view e-mailed reports (or e-mail attachments) with a fixed-width or monospaced font (Courier or Lucida Console, for example).

#### **Edit/Append Attachment dialog box**

The Edit/Append Attachment dialog box appears when you press Enter or A in the Attachment File scroll region of the E-Mail Information screen.



- 1. Enter the File Name of the file you want to attach to the e-mail, or click the browse button ( ... ) to navigate to the file.
- 2. Use the **Proceed (OK)** command to add the attachment to the e-mail, and return to the E-Mail Information Screen.

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#### **Commands**

Use the following commands when a report appears on the screen:

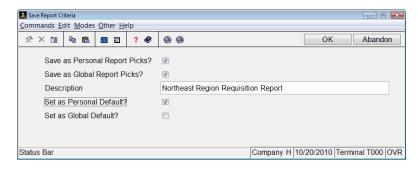
Key	Operation
PgUp	Moves to the previous page of the report.
PgDn	Moves to the next page of the report.
Home	Moves directly to the top of a group of pages.
End	Moves directly to the bottom of a group of pages.
F7	Exits to the menu from any point in the report.
Left	Moves left one character.
Right	Moves right one character.
Tab	Toggles between the left and right halves of a report.
Up/Down	Moves a line up and down the screen to line up information when you toggle between halves of a report.

## Using Report Pick Screen Criteria

You can save the pick criteria from any report screen to make it easier to run reports without redefining the criteria each time.

The RM option to **Use Report Defaults?** must be set to **Yes** to use this functionality.

After you choose to print a report, the Save Report Criteria screen appears.



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• Check the Save as **Personal Report Picks?** box save the pick criteria for use at a later time on your workstation.

- Check the Save as **Global Report Picks?** box to save the pick criteria for use by anyone in your organization who has access to this report.
- Enter a **Description** for these report defaults for identification.
- If you check the **Set as Personal Default?** box (or enter **Y** in text mode), these pick criteria will be automatically applied on the report screen the next time you run the report from the menu.
- If you check the **Set as Global Default?** box (on enter **Y** in text mode), these pick criteria will be automatically applied on the report screen whenever anyone in your organization runs the report from the menu.

Whether or not you set saved criteria as a default, you can load any report criteria you have saved by clicking **Shift-F3** and choosing the description you want.

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**CHAPTER 2** 

2

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Installing OSAS Web B2B 2-3

# Installation and Setup

## Installing the Web Server

Before you install and set up OSAS Web B2B, you must install and configure your web server. OSAS Web B2B works with most popular web servers. However, the web server you use must have the ability to use Standard CGI.

You can install the web server on the same system on which OSAS is installed, or you may choose to install it on a separate computer. If you choose to use a different computer for a web server, you must be able to establish communications between your OSAS system and the web server through a network or modem connection. The web server and the OSAS system *must* be able to communicate because OSAS Web B2B provides several functions that move data files and programs from OSAS to the web server and back again.

When you set up your web server, you need a declaration in your CGI setup to handle BBx programs and graphical images. You must specify these virtual directories for

- CGI scripts (/osasweb) with the path to the OSAS Web B2B programs
- graphical images (/image) with the path to the graphical images

• style sheets (/style) with the path to the OSAS Web B2B programs and style sheets

If you have questions about setting up virtual directories, consult your web server user's manual.

The web server must have access to a BBx interpreter in order for OSAS Web B2B to function. If your web server can access your OSAS Resource Manager directory at all times, you can use the interpreter installed there for OSAS Web B2B. If not, you must install a BBx interpreter on the web server itself before you install OSAS Web B2B.

Once you have your web server installed and operational, you can proceed with OSAS Web B2B installation.

### Security Procedures and Devices for OSAS Web B2B

Data security is a priority for many companies. OSAS Web B2B is designed to secure your files, customer lists, and account information through use of integral password checks which you setup during your OSAS Web B2B installation. To enhance OSAS Web B2B's built in security codes, you may install a *firewall* for your web server.

A firewall is a generic name for a program or system that enforces access control between two network systems. By requiring any user to enter a password, a firewall acts as a buffer from unwanted access into your system. While they do not protect against viruses, firewalls are recommended to protect sensitive data.

If you have questions and concerns, your value added reseller can supply you with answers and suggestions.

If you are using a Windows Web Server that accesses data through a UNIX Data Server, see page 4-7.

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# Installing OSAS Web B2B

When you set up OSAS Web B2B, you can elect to allow access to your OSAS data files directly from the Internet, or to allow access to copies of your files stored on the web server (even if the web server is installed on the same machine). The process of using copies of your files is known as *remote processing*.

If you elect to use remote processing, you must complete a few additional steps after you complete the installation and setup checklist below.

## OSAS Web B2B Requirements and Applications

You must have the Accounts Receivable application installed and set up on your system to use OSAS Web B2B. OSAS Web B2B uses your Customer file as a basis for the access codes that allow your customers to access the OSAS Web B2B functions on the Internet.

You have control of which OSAS Web B2B functions can be run, and by which customers. However, some of the functions require other OSAS applications in order to work.

With Accounts Receivable installed, your customers can use the **Account Information**, **History Inquiry**, **Invoice Inquiry**, and **Aged Trial Balance** functions.

If Inventory is installed on your system, your customers can access the **Item Inquiry** function.

If Sales Order is installed, your customers can use the **Order Inquiry** function.

If you have both Inventory and Sales Order installed, your customers can use the **Sales Order Entry** function.

## OSAS Web B2B Setup Checklist

Follow these steps to install and set up OSAS Web B2B on your computer:

Many of the functions you use during the setup process ask you for path (or directory) names where certain web server files, programs and data files reside. Read the instructions for these functions carefully. Some path names describe the directory from the web server to the OSAS system, and others describe the directory from the OSAS system to the web server.

- 1. Use Resource Manager to install OSAS Web B2B on your computer. See the Resource Manager guide for installation instructions.
- 2. Use the **Company Information** function in Resource Manager (see the Resource Manager guide) to set up each company for which you want to provide web access.
- 3. Use the Customer Internet Access Codes function (page 3-13) to control which of your customers can access the OSAS Web B2B functions, the functions to which each customer has access, and the Inventory Location that is used to calculate prices for this customer.
- 4. Use the **Item Group Codes** function (page 3-3) to set up item groups for item inquiry and sales order entry web functions.
- 5. Use the **Internet Inventory Item Groups** function (page 3-9) to add items or item subgroups to the groups you set up.
- Use the **Inventory Item Pictures** function (page 3-5) to associate graphic images with inventory items for display in the item inquiry and sales order entry web functions.
- 7. Use the **Customer Groups** function (page 3-17) to set up the item groups to which each customer has access during the item inquiry and sales order entry web functions.
- 8. Use the **Tables** function (page 3-21) to set up the **EMAIL** table, which stores the E-mail address your customers use to contact you if they encounter problems using the web functions.

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- 9. Use the **Create Login Page** function (on page 4-3) to build your login page and to copy it to your web server directory.
- 10. Use the **Install Web Server Components** function (on page 4-5) to set up the communication between the web server and OSAS, and to copy the OSAS Web B2B programs and drivers to the web server.

You may need to edit the CONFIG.BBX file created on the web server after completing the **Install Web Server Components** function. Consult Appendix D for more information on modifying the CONFIG.BBX file.

Follow these additional steps if you are using remote processing with OSAS Web B2B:

11. Use the **Copy OSAS Programs to Web Server** function (page 6-5) to copy certain special OSAS programs to the web server.

These programs perform tasks such as accessing inventory quantity and pricing information, calculating balances, and so on. If your web server can access the Resource Manager programs path directly at all times, you can skip this step.

12. Use the **Copy Data Files to Web Server** function (page 6-3) to copy your data files to the web server. You must copy the optional data files when setting up OSAS Web B2B.

Using copies of your data files may provide a higher level of security, but it requires you to update the files periodically on both the OSAS system and on the web server. You can update files using the functions on the OSAS Web B2B menus. See chapter 5 for more information about these periodic tasks.

# CHAPTER 3

3

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# File Maintenance

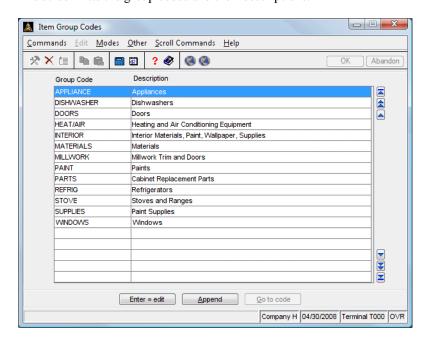
# Item Group Codes

Use item groups to group inventory items together for display and security purposes on the Item Inquiry and Order Entry web pages. You can restrict access to the items by the groups you set up.

Use the **Item Group Codes** function to add item groups or change the description of existing item groups. The groups you create are used to restrict access to your inventory files. You can place the same inventory items in multiple groups, or exclude inventory items from all groups, as you like. You can then specify the groups to which each customer has access.

## Item Group Codes Screen

The screen lists the group codes and their descriptions.



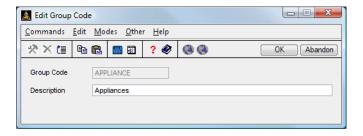
Use these commands to work with the group codes:

- Press **Enter** to edit the selected item group code description. The Edit Group Code screen appears.
- Press A to add a new item group to the list. The Append Group Code screen appears.
- Press G to go to a specific item group code, then enter the code. This
  command is available only when there is more than one screen of item group
  codes.

When you finish, use the **Exit** (F7) command to return to the File Maintenance menu.

### Append/Edit Group Code Screen

The Append Group Code Screen appears when you add a new group code to the list. The Edit Group Code Screen appears when you edit an existing group code. Other than the title, these screens are identical.



Enter the group code (up to 10 characters). If you are editing an existing group code (as in the example above), you cannot change the group code. Instead, return to the Group Codes screen, use the **Delete** (**F3**) command to delete the incorrect code, then press **A** to enter a new code.

Enter the code's description, then use the **Proceed (OK)** command to save your changes and return to the Group Codes screen.

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## Inventory Item Pictures

Use the **Inventory Item Pictures** function on the **File Maintenance** menu to associate a graphic file with your inventory items. The graphic image associated with the item appears on the Item Inquiry and Order Entry web pages.

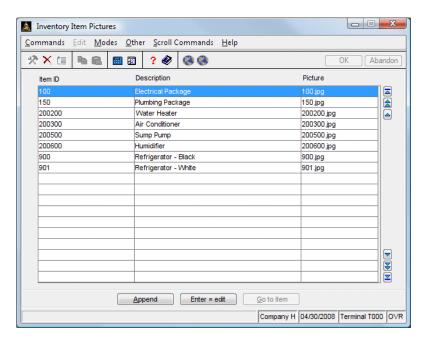
You can use a variety of graphic image formats, including . $\mathbf{JPG}$  and . $\mathbf{GIF}$  image files.

Not all graphics formats can be viewed with all browsers. Generally, .GIF and .JPG images are recommended because most browsers can display them, and because their small file size allows them to load faster.

If you do not associate a graphic file with an inventory item, OSAS Web B2B uses the convention of item ID + .GIF to search for images. This convention can save you time. Instead of taking the time to associate graphic image files with items using this function, name your images with the appropriate item ID and place them in the directory specified for the virtual **/image** directory on the web server. When a customer accesses a web page that uses item images, OSAS locates the appropriate graphic file according to the convention and displays it on the page.

In order to appear correctly on the web page, the image files must be located in the directory specified for the virtual **/image** directory on the web server.

### Inventory Item Pictures Screen



The screen lists the inventory items and descriptions set up in the Inventory **Items** function along with the pictures you have associated with them. If you did not use this function to associate a picture with an item, the item does not appear in the list even though it may exist in inventory.

Use the commands to work with inventory item pictures:

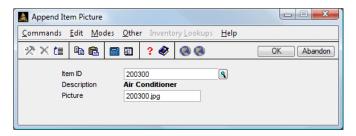
- Press **Enter** to edit a picture name. The Edit Item Picture screen appears.
- Press **A** to add a new picture. The Append Item Picture screen appears.
- Press G to go to a specific item, then enter the item ID or use the Inquiry
   (F2) command to select an item from the list that appears. This command is available only when there is more than one screen of pictures.

When you finish, use the **Exit** (**F7**) command to return to the main menu.

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## Append/Edit Item Picture Screen

The Append Item Picture screen appears when you add a picture to a new item. The Edit Item Picture screen appears when you edit an existing picture. Other than the title, these screens are identical.





Enter the item ID. The item's description appears. If you are editing an existing picture, you cannot change the item ID. Instead, return to the Item Picture screen, use the **Delete** (**F3**) command to delete the item from the item picture file, and then press **A** to add a new picture.

Enter the picture's file name, then use the **Proceed (OK)** command to save your changes and return to the Inventory Item Pictures screen.

# Internet Inventory Item Groups

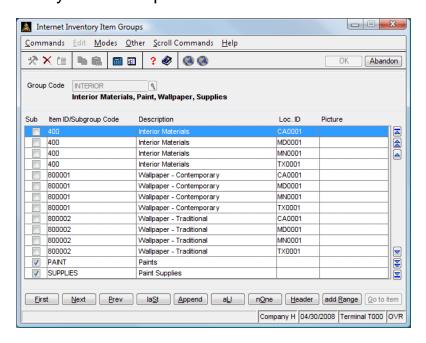
Use the Internet Inventory Item Groups function to:

- Add inventory items to an item group.
- Add subgroups to an item group.
- Change the inventory locations included in an item group.
- Remove inventory items or locations from an item group.

Item groups organize inventory items together for display and security purposes on the Item Inquiry and Order Entry web pages. You can restrict access to the items by the groups you set up.

Use the **Item Group Codes** function (page 3-3) to add item groups to the system.

## Internet Inventory Item Groups Screen





After you select a group code, the screen lists the subgroups and items set up for that code. Only the group codes you set up in the **Item Group Codes** function (page 3-3) appear in the **Group Code** field.

If you have set up a picture for an item using the **Inventory Item Pictures** function (page 3-5), the graphics file name appears in the **Picture** field.

The **Sub** field indicates whether the line item is a subgroup: if the check box is selected (or if **YES** appears in text mode), the line item is a subgroup; if it is clear (or if **NO** appears in text mode), the line item is an inventory item.

To set up a subgroup, first set up the subgroup code and description using the **Item Group Codes** function (page 3-3). Next, enter that code in the **Group Code** field and add inventory items to it. Finally, enter that group code as a line item for a different group code. When the **Is this item a subgroup?** message appears, select the check box (or enter **Y** in text mode) to indicate that you are adding a subgroup, then enter the subgroup code.

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To exclude an item (or item location) from the list, select the line to exclude and use the **Delete** (**F3**) command to remove it from the list.

#### Commands

Use these commands to work with the items and subgroups for a group code:

- Press **F** to view items for the first item group on file.
- Press **N** to view items for the next item group on file.
- Press **P** to view items for the previous item group on file.
- Press **S** to view items for the last item group on file.
- Press A to add an item or subgroup to the group. The Is this item a subgroup? message appears.

Inquiry

To add a subgroup to this group, select the check box (or enter **Y** in text mode) and then enter the subgroup code.

Inquiry

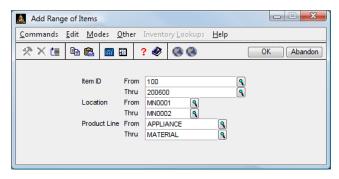
To add an item to this group, clear the check box (or enter **N** in text mode) and then enter the item ID. All locations for the item are added to the list.

- Press L to include all inventory items in this item group.
- Press **O** to remove all inventory items from this group.
- Press **H** to select a different group code.
- Press **R** to add a range of item IDs to the group. The Add Range of Items screen appears.
- Press **G** to move to a specific item, then enter the item ID or use the **Inquiry** (**F2**) command to select the item from the list that appears. This command is available only when there is more than one screen of items.

To save your entries, press **Enter** at the **Item ID** or **Subgroup Code** field. To exit to the **File Maintenance** menu, use the **Exit** (**F7**) command.

#### Add Range of Items Screen

The **Add Range of Items** screen appears when you press **R** on the Internet Inventory Item Groups screen to add a range of items to an item group.



Inquiry

Select the range of item IDs, locations, and product lines to add to the inventory item group. To add all items for a location to an item group, enter only the location IDs whose items you want to add. To add all items from an inventory product line to a group, enter only the product lines.

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## **Customer Internet Access Codes**

You grant Internet access to your data for your customers through Internet access codes. You can limit access for certain customers to particular web pages and item groups.

You can set up multiple access codes for specified customers. This function allows some of your customers' employees access to limited data, while others can access more extensive information.

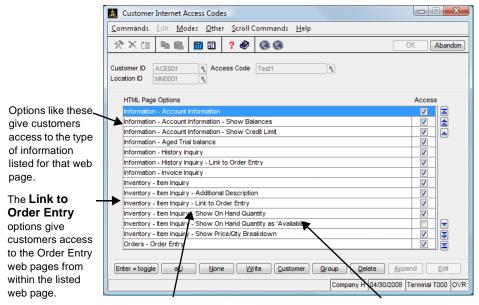
You can also set up *master access codes* that are not associated with a particular customer. For example, these access codes can be given to your sales representatives, allowing them remote access to multiple customers' data. Master passwords cannot match any customer-specific passwords you set up.

#### Use the Customer Internet Access Codes function to:

- Add access codes for a customer.
- Change the information that a customer can access with an access code.
- Set up additional access codes for a customer.
- Set up master passwords for your staff.
- Remove access for customers.
- Set up the inventory location to use when calculating prices for a customer.

You must set up access codes for your customers before they can access the information on your web site.

#### Customer Internet Access Codes Screen



Select this option to show customers on hand inventory item quantities on the Order Entry web page. Select this option to show customers the message "Available" on the Order Entry web page when on hand quantities exist in Inventory. You must elect to show on hand quantities before you can use this option.

If no on hand quantities exist in inventory, the message "Out of Stock" appears instead.

Inquiry

1. Enter the customer ID to which you want to give access. To set up a master password, leave this field blank.

Inquiry

2. Enter the access code. A customer may have multiple access codes.

Inquiry

3. If you enter a new access code, the **Copy From Company ID** field appears. You can copy access parameters from a customer in this company or in another company. Enter the company ID from which you want to copy customer access codes, or press **Enter** to proceed without copying.

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Inquiry

4. If you entered a company ID, the **Copy from Customer ID** field appears. Enter the customer ID from which you want to copy an access code. The customer ID you specify must use the same access code you specified in the **Access Code** field.

Inquiry

- 5. Enter the inventory location ID you want to use to calculate prices for this customer.
- 6. If the customer has access to the listed web page or its related information, the **Access** check box is selected (or **YES** appears in text mode). If the customer does not have access, the box is clear (or **NO** appears in text mode).

Press **Enter** to toggle access on and off for the selected option, or use the commands to toggle access for all options.

- 7. Use these commands to work with the HTML page options in the list:
  - Press Enter to toggle access for the selected option on and off.
  - Press L to give the customer access to all the page information listed.
  - Press **N** to deny the customer access to all the page information listed.
  - Press W to save your changes.
  - Press **C** to return to the **Customer ID** field to select another customer.
  - Press G to open the Customer Groups screen (page 3-19) where you can specify which item groups this customer can access.
  - Press D to remove this access code for this customer.
  - Press A to add an HTML page option to the list.
  - Press **E** to edit an HTML page option. You cannot edit system pages.
- 8. To save your entries, press **W**. Next, enter another customer ID and access code or use the **Exit** (**F7**) command to return to the **File Maintenance** menu.

# **Customer Groups**

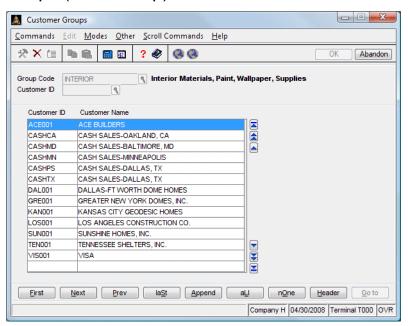
Use the **Customer Groups** function to:

- Add customer access to an item group.
- Change the customers that have access to an item group.
- Remove customer access from an item group.

You can work with customers and item groups in two ways. You can either:

- Specify a group and enter the customers that have access to it.
- Specify a customer and enter the groups the customer can access.

## Customer Groups (Item Group) Screen

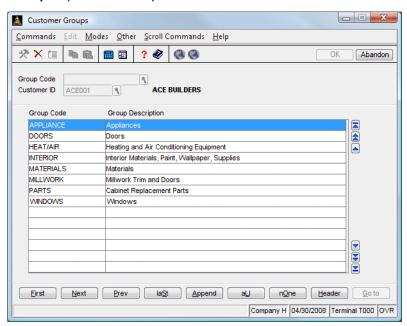




To list the customers that have access to a specific group code, enter the code in the **Group Code** field. The customers with access to that group appear.

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## Customer Groups (Customer) Screen





To list the group codes a specific customer can access, leave the **Group Code** field blank and enter the customer ID you want to view in the **Customer ID** field. The item groups this customer can access appear.

Use these commands to work with the information on the screen:

- Press **F** to view the first item group or customer on file.
- Press **N** to view the next item group or customer on file.
- Press **P** to view the previous item group or customer on file.
- Press **S** to view the last item group or customer on file.

Inquiry

- Press A to add a customer or item group to the list, then enter the ID or code to add.
- Press L to add access for all customers or item groups to the list.

- Press **O** to clear the list for the selected item group or customer.
- Press H to return to the header section to select a different customer or item group.
- Press **G** to go to a specific customer or item group in the list, then enter the ID or code. This command is available only when there is more than one screen of information.

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## **Tables**

Tables store information and options used by the system. Use the **Tables** function to set up and maintain the OSAS Web B2B **EMAIL** table. The **EMAIL** table stores the address of the contact person for web problems. This address appears on the web pages as the customer's contact if any problems occur while viewing information.

OSAS Web B2B also uses these tables:

- The HOMEPATH table stores your entries when you use the Create OSAS Web Login Page function.
- The **WEBPATH** table stores your entries when you use the **Install Web Server Components** function.
- The COPYPATH table stores your entries when you use the Copy Programs to Web Server and Copy Data Files to Web Server functions.
- The **IMGPATH** table stores the path to the directory where you store image files for use by the web server.

The HOMEPATH, WEBPATH, COPYPATH, and IMGPATH tables are automatically created and maintained by the functions described above. You should not change these tables using the **Tables** function. Instead, change the information in these tables using the functions listed. Use the **Tables** function to maintain only the **EMAIL** table.

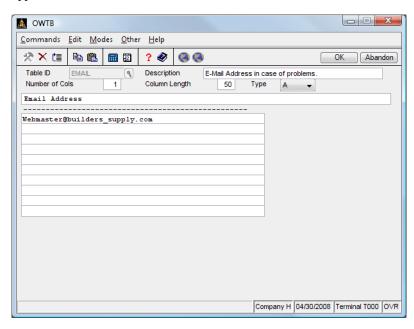
#### **Tables Screen**

Follow these instructions to maintain the **EMAIL** table using the **Tables** function:

1. Select **Tables** from the **File Maintenance** menu. A blank Tables screen appears.

Inquiry

2. Enter **EMAIL** in the **Table ID** field. The **EMAIL** table's description, number of columns, column length, type (alphanumeric or numeric), headings, and data appear.



- 3. Enter the e-mail address of the person in your company who should be contacted in the event of web problems.
- Use the Proceed (OK) command to save your changes. The cursor returns to the Table ID field. Use the Exit (F7) command to return to the File Maintenance menu.

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# Change Fields

Use the **Change Fields** function on the **File Maintenance** menu to change any code used from one value to another. The **Change Fields** function can change codes within this application, as well as in other applications. To produce a list of fields changed, use the Print Log feature. A sample of the log is on page 7-26.

When you select **Change Fields** from the **File Maintenance** menu, the Change Fields screen appears:



The screen contains three sections. The top **Header** section, which includes the **Field ID** and **Print Log?** fields, is where you select the code or ID to change and whether you want to produce the printed log. The lower left **Values** section is where you build a list of the values you want to change by specifying the old value and the new value. The lower right **Files** section contains a list of the files that are changed in the applications you installed on your system.

#### Header

#### Inquiry

- Enter the Field ID you want to change. You can change only General Ledger fields from the General Ledger menu. To change IDs and codes from other applications, run the Change Fields function in the respective application.
- 2. Select the **Print Log?** check box to print a list of the files that are changed.
- 3. After you enter the **Field ID** and indicate your preference for printing the log, use the **Proceed (OK)** command to begin entering field values to change.

#### **Values**

- 4. To edit or add original/new values in this section, select a line and press Enter to edit the current line. The Edit Original/New Values dialog box appears. Press A to append another value to the list. The Add Original/New Values dialog box appears.
- 5. Enter the current field value you want to change in the **Original Value** box.
- 6. Enter the new value that you want to use for this field in the **New Value** box.
- 7. Select a command.
  - Press **S** to switch to the **File Description** section to specify which files change during processing.
  - Press **Enter** to edit the current line.
  - Press **A** to append another value to the list.
  - Press **B** to begin the change field process.
  - Press H to return to the header section to change the selection you made for printing the log.
  - Press **G** to go to a particular entry. This option is only available when there is more than one page of entries.

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- Press **F** to choose a new field ID (this abandons any field changes you entered, but have not yet saved).
- 8. Continue entering old values and new values until you have specified all of the values you want to change in the **Values** section.

#### **Files**

The files that contain the **Field ID** you selected appear in the **File Description** section. You should change IDs in all of the files as a general rule. Exclude files from the change process only when your reseller or support representative instructs you to so.

- 9. The **Time** field gives you an idea of the relative time it takes to change the field in a given file. Files where this code or ID are a part of the key to the file can be changed more quickly than files where each record in the file must be scanned for the code or ID. Each file is rated as **Short** or **Long** to denote the estimated time required to change the field.
- 10. The **Tag** field denotes whether the file is affected by the copy process. Tag the file to change fields in the file.
- 11. Select a command.
  - Press **S** to switch to the **Values** section of the screen.
  - Press Enter to toggle a file as included or excluded from the copy process.
  - Press A to tag all of the files.
  - Press **N** to untag all of the files.
  - Press B to begin the change field process.
  - Press **H** to return to the header section to change the selection you made for printing the log.

- Press **G** to go to a particular entry. This option is only available when there is more than one page of entries.
- Press **F** to choose a new field ID (this abandons any field changes you entered, but have not yet saved).
- 12. When you have tagged the files you want to change, press **B** to begin the change process. When the changes are complete, the log prints if you elected to produce it.
- 13. Enter a new **Field ID** to change, or use the **Exit (F7)** command to return to the **File Maintenance** menu.

### Change Fields Log

04/30/2008 11:45 AM				Page		
File Name	Records Read	Records Conve	rted Origi	nal Total Record	New Total Records	;
OWGCH	4		2	13	13	3
OWCGH	3		1	26	26	5
OWICH	18		16	220	220	)
Field ID	OW GROUP C	ODE				
Original Va	lue	New V	alue			
APPLIANCE		APPS				
DISHWASHER		DSW				

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CHAPTER 4

4

Create Login Page 4-3 Install Web Server Components 4-5

# Set Up Web Components

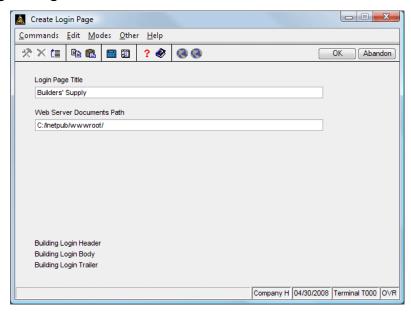
## Create Login Page

Use the **Create Login Page** function to build the login page for the web server. You must run this function to:

- create your OSAS Web B2B login page for the first time.
- change the title used on the login page.

**Note:** Before you can use this function, make sure the company's **OSAS Web** field is set to **Active** in the Resource Manager **Company Information** function.

### Create Login Page Screen



Enter a title for your login page, then enter the directory path name to the location on the web server from which web pages are launched.

To save your entries and create the login page, use the **Proceed (OK)** command. After the page is created, the **Set Up Web Components** screen appears.

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## **Install Web Server Components**

Use the **Install Web Server Components** function to copy the components required for OSAS Web B2B to the web server. This function copies the various OSAS Web B2B web pages and web drivers.

The information copied to the web server is divided into three categories:

- Web server programs, including the OSAS Web B2B programs, scripts, style sheets, and batch files.
- Data files, including the OSAS Web B2B, Accounts Receivable, Sales Order and Inventory files, copied by the Copy Data Files to Web Server function (page 6-5).
- Resource Manager programs, including the applications programs used in calculating prices, aging customers, and so on, copied by the Copy Programs to Web Server function (page 6-5).

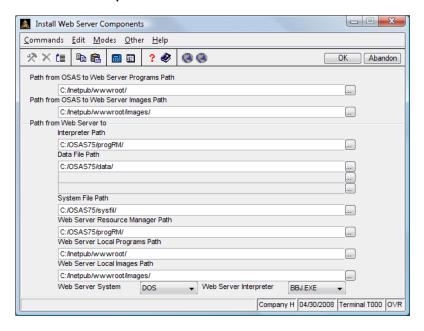
In this function, you tell OSAS Web B2B where this information is stored. You need to describe how to reach the web server from the OSAS system, and how to access the information from the web server.

If you use local processing, the programs and data files reside on the same system where OSAS is installed. If you use remote processing, the programs and data files reside on the web server.

If you are using a Windows Web Server that accesses data through a UNIX Data Server, see page 4-7.

For a list of the files copied, see appendix C.

### Install Web Server Components



#### **Field Definitions**

Field Name	Description
Web Server Programs Path	Enter the full path from the OSAS system to the web server programs path.
Web Server Images Path	Enter the full path from the OSAS system to the web server images path.
BBx Interpreter Path	Enter the full path from the web server to the location of the BBx interpreter.
Data File Path	Enter the full path from the web server to the OSAS data files. If you use remote processing, enter the path where the data file copies are kept.

4-6 OSAS Web

Field Name	Description
System File Path	Enter the full path from the web server to the OSAS <b>sysfil</b> path. If you use remote processing, enter the path where the <b>sysfil</b> copies are kept.
Web Server Resource Manager Path	Enter the full path from the web server to the location of the Resource Manager programs.
Web Server Local Programs Path	Enter the full path to the directory mapped to the virtual <b>\osasweb</b> directory on the web server.
Web Server Local Images Path	Enter the full path to the directory mapped to the virtual <b>\images</b> directory on the web server.
Web Server System	If the web server resides on a UNIX/Linux system, enter <b>U</b> . If the web server resides on Novell or Windows 95/98 or NT, enter <b>D</b> .
Web Server Interpreter	Select the type of interpreter the web server uses, <b>BBJ.EXE</b> or <b>VPRO5.EXE</b> .

To save your entries or begin the copy process, use the **Proceed** (**OK**) command. When the copy process finishes, the **Set Up Web Components** menu appears.

#### Windows Web Server/UNIX Data Server

If you are using a Windows Web Server that accesses data through a UNIX Data Server, you must set up a UNIX user ID on the UNIX Data Server.

On the UNIX computer accessing the OSAS Web B2B data files, set up **osasweb** as a UNIX user ID.

**Note:** If you do not want to use **osasweb** as your user ID, you must change the userid entries in the **OW\*.tmp** files in the **progOW** directory. Edit the **OW\*.tmp** files **before** you use the **Install Web Server Components** function.

# CHAPTER 5

5

Sales Order Processing or Web	the 5-3
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Build Sales Orders from Remote Files	5-7
Purge Log File	5-1

# Sales Order Processing

## Sales Order Processing on the Web

If you allow your customers access to the sales order processing functions on the web, use the functions on the **Sales Order Processing** menu.

When you set up OSAS Web B2B, you can elect to allow access to your OSAS data files directly from the Internet, or to allow access to copies of your files stored on the web server. The process of using copies of your files is known as *remote processing*. See chapter 2 for more information about remote processing.

When your customers enter sales orders through the Internet, OSAS Web B2B stores the orders as quotes in the Sales Order Header and Detail files. If you are using remote processing, OSAS Web B2B uses the files kept on the web server. If not, OSAS Web B2B uses the same files used in Sales Order Processing. In either case, OSAS Web B2B keeps a log file of the orders that have been entered, and any comments customers enter along with their orders.

Use the functions on the **Sales Order Processing** menu on a daily basis, as described below (skip steps 2 and 4 if you do not use remote processing):

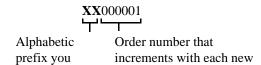
- 1. Print the Transaction Journal to list the orders that have been entered along with any comments from the customers.
- If you use remote processing, run the Build Sales Orders from Remote
  Files function to transfer your customers' orders from the remote data files
  to your live OSAS data files.
- Use the Purge Log File function to prepare the log file for the next day's entries.
- If you use remote processing, run the Copy Data Files to Web Server function on the Remote Access menu.

#### **Order Numbers**

By default, OSAS Web B2B uses the numbers set up in Sales Order to number sales orders entered through the web. When a customer enters an order through the web, the system determines the next available order number and enters the order as a price quote with that order number.

If you use remote processing, the system scans for available numbers a second time when you build sales orders from remote files in order to prevent overwriting quotes entered internally through Sales Order. Any changed order numbers print on a log after web orders are copied to your live system.

You may prefer to set up order numbers to easily distinguish between orders entered internally and those entered through the web. Using the **Company Information** function on the Resource Manager **Company Setup** menu, you can assign a two-character prefix to order numbers for web orders. OSAS then uses this convention to assign order numbers:



If you assign only a one-character prefix, the remaining numeric portion contains seven numbers instead of six.

When you use prefixes, orders entered through the web appear in Sales Order as price quotes with order numbers in the format described above (even if you use remote processing). Use these prefixed order numbers to quickly distinguish between quotes entered via the web and those entered internally.

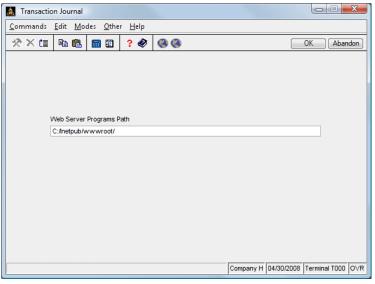
5-4 OSAS Web

## **Transaction Journal**

The **Transaction Journal** function produces a list of the orders entered on the web site. This list serves as an audit trail of the transactions, as well as an edit register to check for necessary changes or incomplete entries.

If you use remote data files, you can print the Transaction Journal before moving the orders to your live Sales Order files as an audit trail. When you use the **Build Sales Orders from Remote Files** function (page 5-7), this report reprints automatically to show any order number changes that have been made in the copy process.

#### **Transaction Journal Screen**



1. The location of the OSAS Web B2B directory on the web server appears. Press **Enter** to accept the path shown, or enter a different path.

2. Select the output device to produce the journal. See "Reports" on page 1-27 for more information on output devices.

## Transaction Journal Report

10/13/2008 3:16 PM	Builders Su Transaction J	
Order No. Date	Time New Order No.	. Additional Comments
00000142 10/10/2008	12:47 PM	Please process promptly.
00000144 10/10/2008 00000149 10/11/2008		
00000150 10/13/2008	1:22 PM	Note shipping address change.
00000151 10/13/2008	2:39 PM	May substitute standard window.
End of report		
00000150 10/13/2008	1:22 PM	11 0

5-6 OSAS Web

## **Build Sales Orders from Remote Files**

You can elect to allow access to your OSAS data files directly from the Internet, or to copies of your files which have been placed on the web server. The process of using copies of your files is known as *remote processing*. See chapter 2 for more information about remote processing.

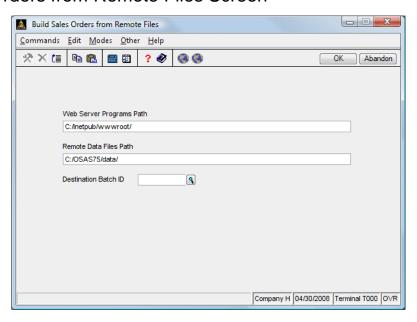
Use the **Build Sales Orders from Remote Files** function to copy orders entered through the web to quotes in your OSAS Sales Order data files.

Do not use this function if you are not using remote processing with OSAS Web B2B. When you elect not to use remote processing, the orders are entered as quotes directly into your OSAS files.

Because remote processing uses a different set of Sales Order files, the order numbers may change when you copy the orders to the live system. This function reprints the Transaction Journal after the copy to show the new order numbers assigned during the copy process.

A sample of the Build Sales Orders from Remote Files Log is on page 5-9.

#### Build Sales Orders from Remote Files Screen



- The web server programs path you specified in the Install Web Server Components function appears. Press Enter to accept the path shown, or enter a different path.
- The remote data files path you used in the Install Web Server Components function appears. Press Enter to accept the path shown, or enter a different path.

Inquiry

- 3. Enter the batch ID you want to use for the quotes that are created during the copy process.
- 4. Select the output device to produce the log. See "Reports" on page 1-27 for more information on output devices. After the orders have been copied and the log prints, the **Sales Order Processing** menu appears.

5-8 OSAS Web

### Build Sales Orders from Remote Files Log

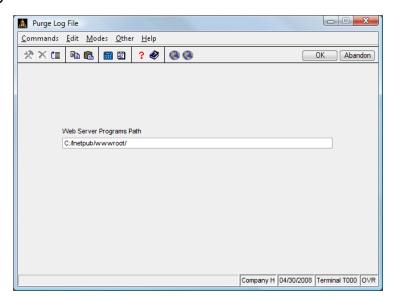
10/15/2008 9:52 AM	Builders Sup Build Sales Orders from	
Order No. Date	Time New Order No.	Additional Comments
00000142 10/10/2008	12:47 PM 00000157	Please process promptly.
00000144 10/10/2008 00000149 10/11/2008		
00000149 10/11/2008		Note shipping address change.
00000151 10/13/2008	2:39 PM 00000161	May substitute standard window.

## Purge Log File

Use the **Purge Log File** function to clear the log file for new orders. If you use remote processing, you should use this function after you use the **Build Sales Orders from Remote Files** function (page 5-7).

You should print the Transaction Journal (page 5-5) before you run this function to preserve an audit trail of the orders that have been entered.

### Purge Log File Screen



The web server programs path you entered in the **Install Web Server Components** function appears. Press **Enter** to accept this path, or enter a different one. Use the **Proceed (OK)** command to begin the purge process. When the purge finishes, the **Sales Order Processing** menu appears.

## CHAPTER 6



Remote Access 6-1 Copy Data Files to Web Server 6-3

Copy OSAS Programs to Web Server 6-5

### Remote Access

#### **Remote Access**

When you set up OSAS Web B2B, you can elect to allow access to your OSAS data files directly from the Internet, or to allow access to copies of your files stored on the web server. The process of using copies of your files is known as *remote processing*. See chapter 2 for more information about remote processing.

Use the functions on the **Remote Access** menu to set up the programs and to refresh your data files if you use remote processing:

- Use the **Copy OSAS Programs to Web Server** function to set up remote processing.
- Use the Copy Data Files to Web Server function regularly to refresh the data stored on your web server. In addition, you should run this function every time you use the Build Sales Orders from Remote Files function on the Sales Order Processing menu.

## Copy Data Files to Web Server

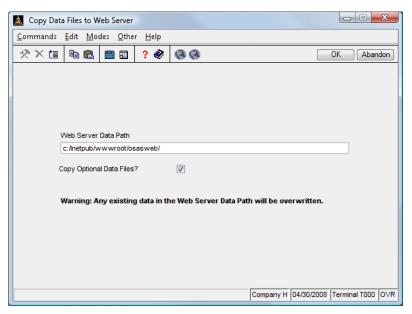
Use the **Copy Data Files to Web Server** function to refresh the data that is stored on the web server if you have chosen remote processing. This program copies the OSAS data files to the web server for the inquiry and sales order entry functions.

This function copies the Inventory, Accounts Receivable, and Sales Order files for use by OSAS Web B2B functions.

You need to run this function only if you are using remote processing. If you are not using remote processing, your live OSAS data files are used for OSAS Web B2B functions.

You must copy the optional files to the web server at least once if you want your customers to be able to view history or inquire on invoices.

### Copy Data Files to Web Server Screen



The web server data path you entered in the **Install Web Server Components** function (page 4-5) appears. Press **Enter** to use this path, or enter the full path from the OSAS system to the data path on the web server.

The AR Detail History file can be large and may take some time to copy. You can choose to skip copying this file to speed up the copy process. To copy the file, select the **Copy Optional Data Files** check box (or enter **Y** in text mode). To skip the file, clear this check box (or enter **N** in text mode).

Use the **Proceed (OK)** command to begin the copy process. When copying finishes, the **Remote Access** menu appears.

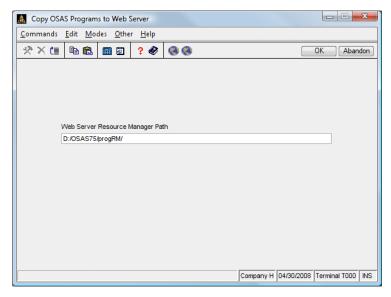
6-4 OSAS Web

## Copy OSAS Programs to Web Server

Use the **Copy OSAS Programs to Web Server** function to set up the web server for remote processing. This program copies the OSAS program files to the web server for the inquiry and sales order entry functions.

You need run this function only during the installation process. Once the programs are copied to the web server, you do not need to copy them again, unless you change your web server or update the OSAS Web B2B software.

### Copy OSAS Programs to Web Server Screen



The web server Resource Manager path you entered in the **Install Web Server Components** function (page 4-5) appears. Press **Enter** to use this path, or enter the full path from the OSAS system to the Resource Manager path on the web server.

Use the **Proceed** (**OK**) command to begin the copy process. When copying finishes, the **Remote Access** menu appears.

6-6 OSAS Web

### CHAPTER 7

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Inventory Item Pictures List	7-7
Internet Companies List	7-9
Internet Inventory Item Gro List	ups 7-11
Internet Access Codes List	7-13
Customer Groups List	7-15
Tables List	7-17

## **Master File Lists**

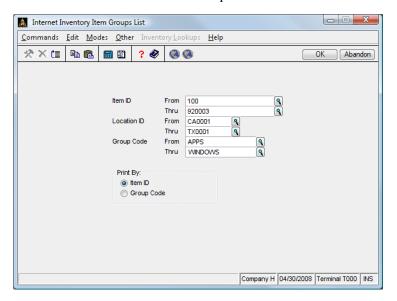
### **Printing a Master File List**

The functions on the **Master File Lists** menu let you print lists of the information you entered using the **File Maintenance** menu. These lists do not contain any calculations or transaction amounts, but rather list only the basic file information used in the OSAS Web B2B system. If any of the information on a master file list is incorrect, use the appropriate function on the **File Maintenance** menu to correct it, then reprint the master file list.

You produce all master file lists the same way. Use the instructions below to print a master file list, modifying the procedure as necessary for the list you are printing. For example, if the screen for the list you want to print does not contain check box options, ignore that step and continue to the next.

Follow these steps to print a master list:

1. Select the list you want to print from the **Master File Lists** menu. The selection screen for that list appears. The Internet Inventory Item Groups List screen is shown below as an example.



Inquiry

2. Select the range of information to include in the list in the **From** and **Thru** fields. The **Inquiry** (**F2**) command is usually available for these fields to let you select beginning and end range values from the list that appears.

Leave these fields blank to include all values in the list.

- 3. If the screen contains options that control the order in which information is printed (for example, print the list by item code or by group code), select the option you want to use to organize the information. You can select only one print option.
- 4. If the screen contains check boxes or Yes/No fields that control additional printing instructions, select the check box (or enter Y in text mode) to use that option when printing the list. Clear the check box (or enter N in text mode) if you do not want to use that option.

7-2 OSAS Web

5. Select the output device to begin printing the list. See "Reports" on page 1-27 for more information. After you produce the list, the **Master File Lists** menu appears.

## Item Group Codes List

The Item Group Codes List shows the item group codes that you set up using the **Item Group Codes** function on the **File Maintenance** menu.

### Sample List

```
Builders Supply
10/12/2008
                                                                      Page
                                                                           1
3:54 PM
                            Item Group Codes List
Group ID Group Description
APPLIANCES Appliances
DISHWASHER Dishwashers
DOORS
          Doors
HEAT/AIR Heating and Air Conditioning Equipment
INTERIOR Interior Materials, Paint, Wallpaper, Supplies
MATERIALS Materials
MILLWORK Millwork Trim and Doors
PAINT
          Paints
PARTS
          Cabinet Replacement Parts
REFRIG
          Refrigerators
          Stoves and Ranges
SUPPLIES Paint Supplies
WINDOWS Windows
End of report
```

# **Inventory Item Pictures List**

The Inventory Item Pictures List shows the image files that you have associated with your inventory items for display on the web. You can select the range of items you want to include in the list.

### Sample List

Item ID         Item Description         Image File           100         Electrical Package         100.jpg           150         Plumbing Package         150.jpg           200200         Water Heater         200200.jpg           200300         Air Conditioner         200300.jpg           200400         Water Softener         200400.jpg           200500         Sump Pump         200500.jpg           200600         Humidifier         200600.jpg	10/12/2008 3:54 PM	Builders Supply Inventory Item Picture	s List	Page	1	
150 Plumbing Package 150.jpg 200200 Water Heater 200200.jpg 200300 Air Conditioner 200300.jpg 200400 Water Softener 200400.jpg 200500 Sump Pump 200500.jpg	Item ID	•	-			
200200       Water Heater       200200.jpg         200300       Air Conditioner       200300.jpg         200400       Water Softener       200400.jpg         200500       Sump Pump       200500.jpg	100	Electrical Package	100.jpg			
200200       Water Heater       200200.jpg         200300       Air Conditioner       200300.jpg         200400       Water Softener       200400.jpg         200500       Sump Pump       200500.jpg	150					
200400         Water Softener         200400.jpg           200500         Sump Pump         200500.jpg	200200	Water Heater	200200.jpg			
200500 Sump Pump 200500.jpg	200300	Air Conditioner	200300.jpg			
	200400	Water Softener	200400.jpg			
200600 Humidifier 200600.jpg	200500	Sump Pump	0.0			
	200600	Humidifier	200600.jpg			
900 Refrigerator - Black 900.jpg	900	Refrigerator - Black	900.jpg			
901 Refrigerator - White 901.jpg	901	Refrigerator - White	901.jpg			
	End of report					

# **Internet Companies List**

The Internet Companies List shows the companies that you have set up for Internet access for the companies you select.

### Sample List

10/12/2008 3:55 PM	Builders Supply Internet Companies List	Page 1	
Comp ID Company Name	Batch		
H Builders Supply	WEBORD		
End of report			

## Internet Inventory Item Groups List

The Internet Inventory Item Groups List shows the item groups and the items that belong to them. The list can be printed for the items, locations, or group IDs you select, and can be sorted by item ID or by group code.

### Sample List

Item ID
100 Electrical Package CA0001 MATERIALS 100.jpg 100 Electrical Package MD0001 MATERIALS 100.jpg 100 Electrical Package MN0001 MATERIALS 100.jpg 100 Electrical Package TX0001 MATERIALS 100.jpg 150 Plumbing Package CA0001 MATERIALS 150.jpg 150 Plumbing Package MD0001 MATERIALS 150.jpg 150 Plumbing Package MN0001 MATERIALS 150.jpg 150 Plumbing Package MN0001 MATERIALS 150.jpg 150 Plumbing Package TX0001 MATERIALS 150.jpg 150 Plumbing Package MN0001 MATERIALS 150.jpg 150 Plumbing Package MN0001 MATERIALS 150.jpg 150 Plumbing Package MN0001 MATERIALS 150.jpg 150 Plumbing Package TX0001 MATERIALS 150.jpg 150 Plumbing Package TX0001 MERAT/AIR 200 Heating/Cooling Package MN0001 HEAT/AIR 200 Heating/Cooling Package MN0001 HEAT/AIR 200 Heating/Cooling Package TX0001 HEAT/AIR 200100 Furnace CA0001 HEAT/AIR 200100 Furnace MN0001 HEAT/AIR 200100 Furnace MN0001 HEAT/AIR 200100 Furnace TX0001 HEAT/AIR 200100 Furnace TX0001 HEAT/AIR 200100 Furnace TX0001 HEAT/AIR
100         Electrical Package         MD0001 MATERIALS         100.jpg           100         Electrical Package         MN0001 MATERIALS         100.jpg           100         Electrical Package         TX0001 MATERIALS         100.jpg           150         Plumbing Package         CA0001 MATERIALS         150.jpg           150         Plumbing Package         MD0001 MATERIALS         150.jpg           150         Plumbing Package         TX0001 MATERIALS         150.jpg           150         Plumbing Package         TX0001 MATERIALS         150.jpg           150         Plumbing Package         CA0001 MATERIALS         150.jpg           200         Heating/Cooling Package         CA0001 MATERIALS         150.jpg           200         Heating/Cooling Package         MD0001 HEAT/AIR         150.jpg           200         Heating/Cooling Package         MD0001 HEAT/AIR         200           200         Heating/Cooling Package         TX0001 HEAT/AIR         200           200         Heating/Cooling Package         TX0001 HEAT/AIR         200           200100         Furnace         CA0001 HEAT/AIR         200           200100         Furnace         MD0001 HEAT/AIR         200           200100         F
100         Electrical Package         MD0001 MATERIALS         100.jpg           100         Electrical Package         MN0001 MATERIALS         100.jpg           100         Electrical Package         TX0001 MATERIALS         100.jpg           150         Plumbing Package         CA0001 MATERIALS         150.jpg           150         Plumbing Package         MD0001 MATERIALS         150.jpg           150         Plumbing Package         TX0001 MATERIALS         150.jpg           150         Plumbing Package         TX0001 MATERIALS         150.jpg           150         Plumbing Package         TX0001 MATERIALS         150.jpg           200         Heating/Cooling Package         CA0001 HEAT/AIR         150.jpg           200         Heating/Cooling Package         MD0001 HEAT/AIR         150.jpg           200         Heating/Cooling Package         MN0001 HEAT/AIR         200           200         Heating/Cooling Package         TX0001 HEAT/AIR         TX0001 HEAT/AIR           200100         Furnace         CA0001 HEAT/AIR         CA0001 HEAT/AIR           200100         Furnace         MN0001 HEAT/AIR         200200.jpg
100 Electrical Package TX0001 MATERIALS 100.jpg 150 Plumbing Package CA0001 MATERIALS 150.jpg 150 Plumbing Package MD001 MATERIALS 150.jpg 150 Plumbing Package MN001 MATERIALS 150.jpg 150 Plumbing Package TX0001 MATERIALS 150.jpg 150 Plumbing Package TX0001 MATERIALS 150.jpg 150 Plumbing Package TX0001 MATERIALS 150.jpg 200 Heating/Cooling Package CA0001 HEAT/AIR 200 Heating/Cooling Package MD0001 HEAT/AIR 200 Heating/Cooling Package MN0001 HEAT/AIR 200 Heating/Cooling Package TX0001 HEAT/AIR 200 Heating/Cooling Package MN0001 HEAT/AIR 200100 Furnace CA0001 HEAT/AIR 200100 Furnace MD0001 HEAT/AIR 200100 Furnace TX0001 HEAT/AIR
150         Plumbing Package         CA0001 MATERIALS         150.jpg           150         Plumbing Package         MD0001 MATERIALS         150.jpg           150         Plumbing Package         MN0001 MATERIALS         150.jpg           150         Plumbing Package         TX0001 MATERIALS         150.jpg           150         Plumbing Package         CA0001 MATERIALS         150.jpg           200         Heating/Cooling Package         MD0001 HEAT/AIR         150.jpg           200         Heating/Cooling Package         MD0001 HEAT/AIR         200           200         Heating/Cooling Package         MN0001 HEAT/AIR         200           2001         Heating/Cooling Package         TX0001 HEAT/AIR         200           2001         Furnace         CA0001 HEAT/AIR         4           2001         Furnace         MD0001 HEAT/AIR         200           2001         Furnace         MN0001 HEAT/AIR         200           2001         Furnace         TX0001 HEAT/AIR         200           2001         Furnace         TX0001 HEAT/AIR         200
150
150         Plumbing Package         MN0001 MATERIALS         150.jpg           150         Plumbing Package         TX0001 MATERIALS         150.jpg           200         Heating/Cooling Package         CA0001 HEAT/AIR           200         Heating/Cooling Package         MD0001 HEAT/AIR           200         Heating/Cooling Package         MN0001 HEAT/AIR           200         Heating/Cooling Package         TX0001 HEAT/AIR           200100         Furnace         CA0001 HEAT/AIR           200100         Furnace         MD0001 HEAT/AIR           200100         Furnace         MN0001 HEAT/AIR           200100         Furnace         TX0001 HEAT/AIR           200100         Furnace         TX0001 HEAT/AIR           200200         Water Heater         CA0001 HEAT/AIR
150   Plumbing Package   TX0001 MATERIALS   150.jpg
200         Heating/Cooling Package         CA0001 HEAT/AIR           200         Heating/Cooling Package         MD0001 HEAT/AIR           200         Heating/Cooling Package         MN0001 HEAT/AIR           200         Heating/Cooling Package         TX0001 HEAT/AIR           200100         Furnace         CA0001 HEAT/AIR           200100         Furnace         MD0001 HEAT/AIR           200100         Furnace         MN0001 HEAT/AIR           200100         Furnace         TX0001 HEAT/AIR           200100         Furnace         TX0001 HEAT/AIR           200200         Water Heater         CA0001 HEAT/AIR         200200.jpg
200         Heating/Cooling Package         MD0001 HEAT/AIR           200         Heating/Cooling Package         MN0001 HEAT/AIR           200         Heating/Cooling Package         TX0001 HEAT/AIR           200100         Furnace         CA0001 HEAT/AIR           200100         Furnace         MD0001 HEAT/AIR           200100         Furnace         MN0001 HEAT/AIR           200100         Furnace         TX0001 HEAT/AIR           200200         Water Heater         CA0001 HEAT/AIR         200200.jpg
200         Heating/Cooling Package         MN0001 HEAT/AIR           200         Heating/Cooling Package         TX0001 HEAT/AIR           200100         Furnace         CA0001 HEAT/AIR           200100         Furnace         MD0001 HEAT/AIR           200100         Furnace         MN0001 HEAT/AIR           200100         Furnace         TX0001 HEAT/AIR           200200         Water Heater         CA0001 HEAT/AIR         200200.jpg
200         Heating/Cooling Package         TX0001 HEAT/AIR           200100         Furnace         CA0001 HEAT/AIR           200100         Furnace         MD0001 HEAT/AIR           200100         Furnace         MN0001 HEAT/AIR           200100         Furnace         TX0001 HEAT/AIR           200200         Water Heater         CA0001 HEAT/AIR         200200.jpg
200100         Furnace         CA0001 HEAT/AIR           200100         Furnace         MD0001 HEAT/AIR           200100         Furnace         MN0001 HEAT/AIR           200100         Furnace         TX0001 HEAT/AIR           200200         Water Heater         CA0001 HEAT/AIR         200200.jpg
200100         Furnace         MD0001 HEAT/AIR           200100         Furnace         MN0001 HEAT/AIR           200100         Furnace         TX0001 HEAT/AIR           200200         Water Heater         CA0001 HEAT/AIR         200200.jpg
200100         Furnace         MN0001 HEAT/AIR           200100         Furnace         TX0001 HEAT/AIR           200200         Water Heater         CA0001 HEAT/AIR         200200.jpg
200100         Furnace         TX0001 HEAT/AIR           200200         Water Heater         CA0001 HEAT/AIR         200200.jpg
200200 Water Heater CA0001 HEAT/AIR 200200.jpg
, 515
200200 Water Heater MD0001 HEAT/AIR 200200.jpg
200200 Water Heater MN0001 HEAT/AIR 200200.jpg
200200 Water Heater TX0001 HEAT/AIR 200200.jpg
200300 Air Conditioner CA0001 HEAT/AIR 200300.jpg
200300 Air Conditioner MD0001 HEAT/AIR 200300.jpg
200300 Air Conditioner MN0001 HEAT/AIR 200300.jpg
200300 Air Conditioner TX0001 HEAT/AIR 200300.jpg
200400 Water Softener CA0001 HEAT/AIR 200400.jpg
200400 Water Softener MD0001 HEAT/AIR 200400.jpg
200400 Water Softener MN0001 HEAT/AIR 200400.jpg
200400 Water Softener TX0001 HEAT/AIR 200400.jpg

## **Internet Access Codes List**

The Internet Access Codes List shows the access codes you set up for your customers for the companies, customers, or access codes you select.

### Sample List

10/12/2008 3:55 PM			Builders Supply Internet Access Codes List	Page 1
Company ID	Cust ID Access Code	Location	HTML Page Type	Access
ł	ACE001 Test1	MN0001	Information - Account Information Orders - Order Inquiry Orders - Order Inquiry - Detail Information Information - History Inquiry Inventory - Item Inquiry - Show On Hand Quantity Inventory - Item Inquiry - Show Price/Cty Breakdown Information - Account Information - Show Balances Information - Account Information - Show Credit Limit Orders - Order Entry Inventory - Item Inquiry - Additional Description Information - Aged Trial balance Information - Invoice Inquiry Inventory - Item Inquiry - Link to Order Entry Information - History Inquiry - Link to Order Entry Orders - Order Inquiry - Link to Order Entry Inventory - Item Inquiry - Link to Order Entry Information - History Inquiry - Link to Order Entry Inventory - Item Inquiry - Show On Hand Quantity as 'Available	YES

### **Customer Groups List**

The Customer Groups List shows the item groups that you have set up for each customer for the customer IDs or group codes you select. You can also choose to organize the list by customer or by group code.

### Sample List

```
10/12/2008
                               Builders Supply
                                                                      Page
                             Customer Groups List
3.55 PM
Cust ID Group ID Group Description
ACE001 APPLIANCES Appliances
ACE001 DOORS
                 Doors
ACE001 HEAT/AIR Heating and Air Conditioning Equipment
ACE001 INTERIOR Interior Materials, Paint, Wallpaper, Supplies
ACE001 MATERIALS Materials
ACE001 MILLWORK Millwork Trim and Doors
ACE001 PARTS
                  Cabinet Replacement Parts
ACE001 WINDOWS Windows
CASHCA INTERIOR Interior Materials, Paint, Wallpaper, Supplies
CASHMD INTERIOR Interior Materials, Paint, Wallpaper, Supplies
CASHMN INTERIOR Interior Materials, Paint, Wallpaper, Supplies
CASHPS INTERIOR Interior Materials, Paint, Wallpaper, Supplies
CASHTX INTERIOR Interior Materials, Paint, Wallpaper, Supplies
DAL001 HEAT/AIR Heating and Air Conditioning Equipment
DALO01 INTERIOR Interior Materials, Paint, Wallpaper, Supplies
GRE001 HEAT/AIR Heating and Air Conditioning Equipment
GRE001 INTERIOR Interior Materials, Paint, Wallpaper, Supplies
KAN001 HEAT/AIR Heating and Air Conditioning Equipment
KAN001 INTERIOR Interior Materials, Paint, Wallpaper, Supplies
LOS001 HEAT/AIR Heating and Air Conditioning Equipment
LOS001 INTERIOR Interior Materials, Paint, Wallpaper, Supplies
SUN001 HEAT/AIR Heating and Air Conditioning Equipment
SUN001 INTERIOR Interior Materials, Paint, Wallpaper, Supplies
TEN001 HEAT/AIR Heating and Air Conditioning Equipment
TEN001 INTERIOR Interior Materials, Paint, Wallpaper, Supplies
VIS001 INTERIOR Interior Materials, Paint, Wallpaper, Supplies
End of report
```

## **Tables List**

The Tables List shows the tables that are on your system for the range of IDs you select.

### Sample List

```
10/12/2008
                                    Builders Supply
                                                                                   Page 1
3:55 PM
                                      Tables List
                                      OSAS Web B2B
 Table ID COPYPATH Description Web Path Table
No. of Columns 1 Column Length 60 Type A
 C:/Inetpub/wwwroot/osasweb/
 D:/OSAS/data/
 D:/OSAS/progRM/
  Table ID EMAIL Description E-Mail Address in case of problems.
 No. of Columns 1 Column Length 50 Type A
 Email Address
 Webmaster@builders_supply.com
 Table ID HOMEPATH Description Home Page Path Table No. of Columns 1 Column Length 60 Type A
 Builders' Supply
 C:/Inetpub/wwwroot/
 98FB98
 000000
```

CHAPTER 8

OSAS Web Login Page	8-1
· · ·	0 1
Account Information	8-5
Aged Trial Balance	8-7
History Inquiry	8-9
Invoice Inquiry	8-13
Item Inquiry	8-17
Order Inquiry	8-23
Order Entry	8-27

### The Web Interface

#### **OSAS Web Login Page**

The OSAS web login page is the first of the web pages presented to Internet users. Your customers use this page to enter their customer ID and password, and to choose the company for which to view information or enter orders.

The login page is created by the **Create Login Page** function on the **Set Up Web Components** menu. See Chapter 4 for more information about this function.

#### OSAS Web Login Page HTML Screen



Enter the customer ID, password (or access code), and then select the company (if you gave that customer access to more than one company).

#### Click **Submit** to continue.

When you click **Submit**, OSAS Web B2B checks the customer ID and password and opens the Account Information web page. This page contains top and side menus based on the functions and information to which you have granted that customer access.

If the customer ID is not set up or the password is incorrect, an error message appears.

#### OSAS Web B2B Menus

There are three top level menu groups: Information, Inventory, and Orders. These top level menus contain one or more side menu functions, as follows:

8-2 OSAS Web

- Information
  - Account Information
  - Aged Trial Balance
  - History Inquiry
  - Invoice Inquiry
- Inventory
  - Item Inquiry
- Orders
  - Order Inquiry
  - Order Entry

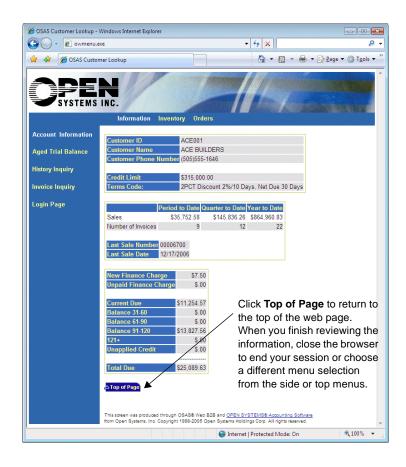
Each top level menu also contains a link that allows you to return to the Login page to log in using a different customer ID, password, or company.

## **Account Information**

The Account Information web page on the **Information** menu displays data for the customer's account from the OSAS files. The information includes general information, and can optionally include aging balances and credit information.

You can specify the information available on this page using the **Customer Internet Access Codes** function on the **File Maintenance** menu.

#### Account Information HTML Screen

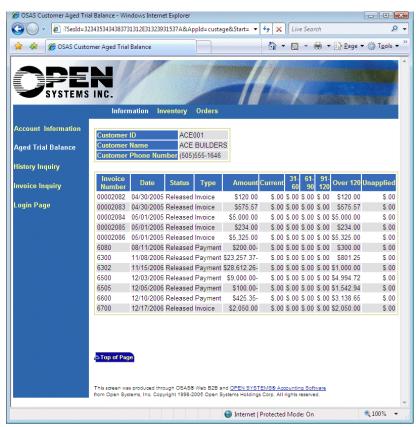


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## Aged Trial Balance

The Aged Trial Balance web page on the **Information** menu lists the balance and aged invoices for the customer's account from the OSAS **ARINx** file.

#### Aged Trial Balance HTML Screen

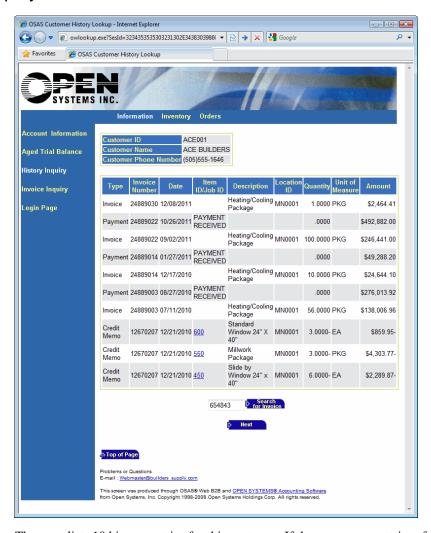


Click **Top of Page** to return to the top of the web page. When you finish reviewing the information, close the browser to end your session or choose a different menu selection from the side or top menus.

# **History Inquiry**

The History Inquiry web page on the **Information** menu shows the invoice, credit memo, and payment history for this customer.

#### History Inquiry HTML Screen



The page lists 10 history entries for this customer. If there are more entries after the ones listed, the **Next** button appears. If there are more entries before the ones listed, the **Previous** button appears. Click these buttons to scroll through the entries.

Click **Top of Page** to return to the top of the web page.

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To find a specific invoice, enter the invoice number in the box and then click **Search For Invoice**.

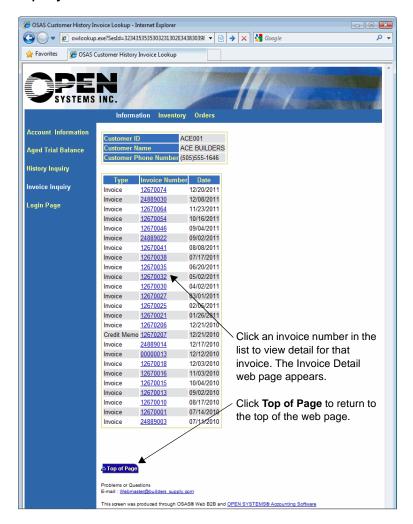
You can also click on an item ID to create a line item for that item in your order entry shopping cart if you are permitted to do so based on your customer ID and password.

When you finish reviewing history, close the browser to end your session or choose a different menu selection from the side or top menus.

# **Invoice Inquiry**

The Invoice Inquiry web page on the **Information** menu shows the invoices and credit memos in history for this customer. Click an invoice number to view more information about that invoice on the Invoice Detail web page (page 8-14).

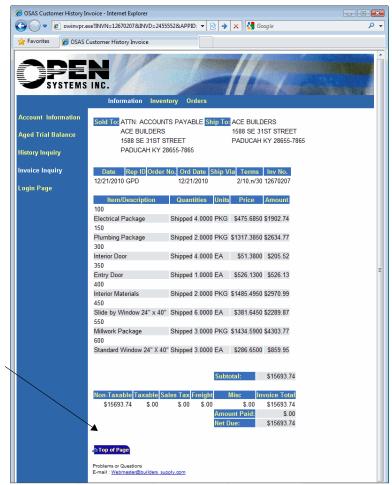
#### Invoice Inquiry HTML Screen



#### Invoice Detail HTML Screen

When you click an invoice number on the Invoice Inquiry web page, OSAS Web B2B re-creates that invoice form from the entries in the AR and IN history files and displays the invoice's detail on this web page.

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Click **Top of Page** to return to the top of the web page. Close the browser to end the session or select an option from the top or side menus.

## Item Inquiry

The Item Inquiry web page lists the inventory item groups to which this customer has access. The groups provide a convenient way to organize items for viewing.

Use the **Customer Groups** function (page 3-17) on the **File Maintenance** menu in OSAS to change the item groups that this customer can view.

Use the **Internet Inventory Item Groups** function (page 3-9) on the **File Maintenance** menu in OSAS to change the items and subgroups in an item group.

Use the **Customer Internet Access Codes** function (page 3-13) on the **File Maintenance** menu in OSAS to choose whether to view quantities and price breaks on this web page.

### Screen Use

Screen	Description
Item Group Codes	Use this screen to select the items you want to list.
Item Inquiry	This screen lists the items and subgroups in the group you select. The items appear in groups of 10.
Item Additional Descriptions	This screen lists the additional description lines for an item and a graphic image of the item, if you set one up.
Item Price Breaks	This screen shows the price breaks for an item you select (if you have access to this information).

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#### Item Inquiry HTML Screen - Group Codes

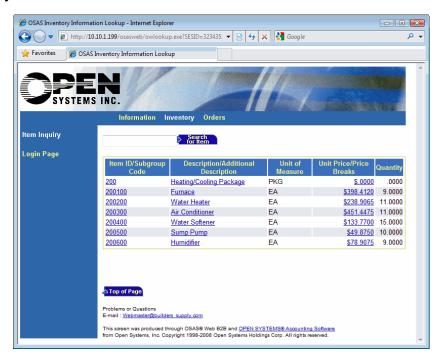


This screen lists 10 groups for this customer. If there are more groups after the ones listed, the **Next** button appears. If there are more groups before the ones listed, the **Previous** button appears. Click these buttons to scroll through the groups.

Click on the description of the item group you want to view. The screen changes to list the items and subgroups in that group.

If there are more than 10 item groups on file, enter the group code and click **Search for Group** to search for a specific item group. To search for a specific item within any group, enter the item ID and then click **Search for Item**.

#### Item Inquiry HTML Screen - Items



The items and subgroups that belong to the group you select appear. Units of measure, unit prices, and quantities appear for items in the group.

- If you click a subgroup ID, the screen changes to list the items in that group.
- If you click on an item ID, you add that item to your order entry shopping cart if you are permitted to do so based on your customer ID and password.
- If you click on a highlighted description, you see additional description information and a graphical image of the item, if available.
- If you click on the price of any item, you see a breakdown of quantity-break pricing for this customer.

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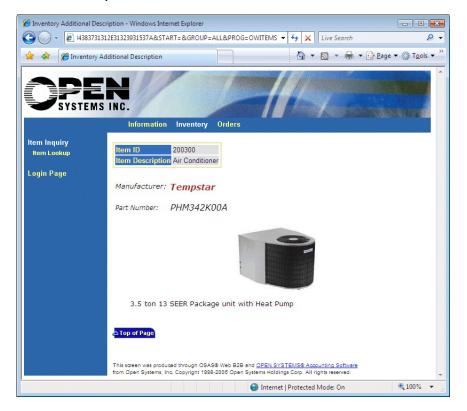
The page lists 10 items and subgroups for this customer. If there are more than 10 items on file, the **Next** and **Previous** buttons appear. Click these buttons to scroll through the list of items.

To search for a specific item within any available group, enter the item ID and then click **Search for Item**.

Click **Top of Page** to return to the top of the web page.

When you finish reviewing the information, close the browser to end your session or choose a different menu selection from the side or top menus.

#### Item Additional Descriptions Screen



Click **Top of Page** to return to the top of the web page.

When you finish viewing additional descriptions, use your browser's **Back** button to return to the Item Inquiry web page.

When you finish reviewing items, close the browser to end your session or choose a different menu selection from the side or top menus.

#### Item Price Breaks HTML Screen



Click **Top of Page** to return to the top of the web page.

When you finish viewing price and price break information, use your browser's **Back** button to return to the Item Inquiry web page.

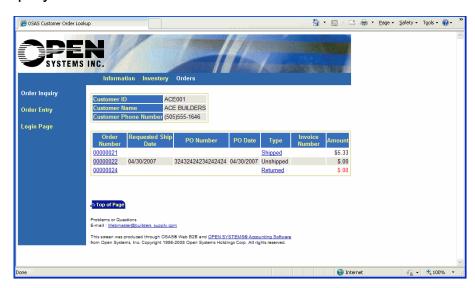
When you finish reviewing items, close the browser to end your session or choose a different menu selection from the side or top menus.

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## **Order Inquiry**

The Order Inquiry web pages display the orders on file from a customer. The information includes the shipping status of the order, and, optionally, the line item detail for individual orders.

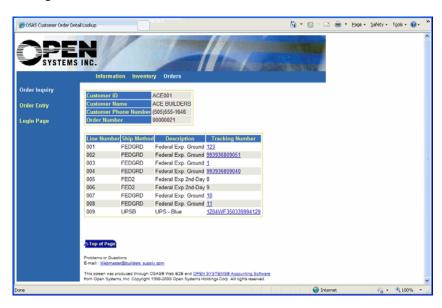
#### Order Inquiry HTML Screen



The screen lists up to 10 orders for this customer. Returned orders appear in red. If there are more than 10 orders for this customer, the **Next** and **Previous** buttons appear. Click these buttons to scroll through the order numbers.

If you have access to Order Inquiry detail information, you can view it by clicking on any highlighted order number. The screen changes to list detail for that order number. When you finish viewing order information, close the browser to end your session or choose a different menu selection from the side or top menus.

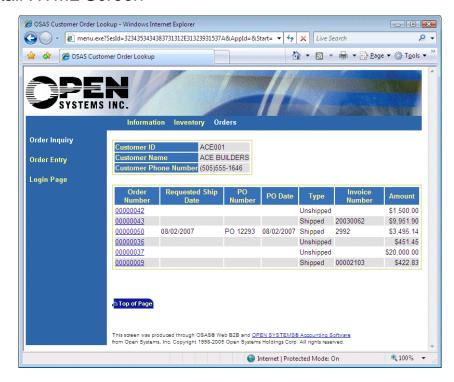
Shipped and returned orders can be connected to tracking number information. If the Shipped or Returned label is highlighted in blue, it may be clicked to open a tracking numbers screen.



On this screen, a tracking number is linked to the same website that's contained in the ship method file in OSAS. The tracking number is then passed to that website, based on how the ship method is set up, and current tracking information can be viewed. Click on the order number to return to the details of the current order.

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#### Order Detail HTML Screen



This page lists up to 10 line items for the order selected. If there are more line items for the order, the **Next** and **Previous** buttons appear. Click these buttons to scroll through the line items for the order.

Click **Top of Page** to return to the top of the web page.

When you finish viewing line item detail, use your browser's **Back** button to return to the Order Inquiry web page. When you finish viewing order information, close the browser to end your session or choose a different menu selection from the side or top menus.

# **Order Entry**

The Order Entry web pages allow your customer to enter a sales order through the Internet.

The customer chooses the items he wants from the item groups to which you grant him access. Next, the customer enters the quantity of the item that he wants to purchase and adds it to his shopping cart. The OSAS Web B2B system then calculates the price and tax for the items the customers ordered, and lists the order total.

When the customer submits the order and verifies the shipping information, OSAS Web B2B creates the order as a quote using the batch ID you specified in the Resource Manager **Company Information** function in OSAS.

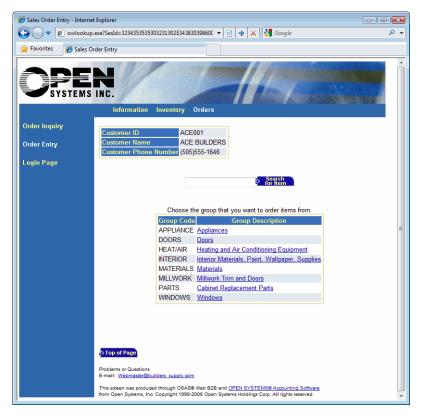
OSAS Web 8-27

### Screen Use

Screen	Description
Order Entry Group Codes	Use this screen to select the item group that contains the items you want to order.
Order Entry Items	Use this screen to select the item you want to order from the group you selected.
Order Entry Line Item	Use this screen to enter the quantity of the item you want, to calculate the price, and to add the item to your shopping cart.
View Shopping Cart	Use this screen to review your order, to change the quantities on any item, and to submit your order.
Shipping Information	Use this screen to verify the shipping address for this order and to enter special notes about it.
Order Number	This page displays the number that identifies your order.

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### Order Entry Group Codes HTML Screen

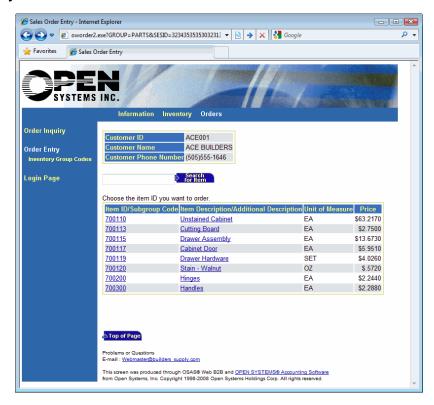


The page lists up to 10 groups for this customer. If there are more groups after the ones listed, the **Next** and **Previous** buttons appear. Click these buttons to scroll through the list of groups.

Click on the item group for which you want to list items, or (if there are more than 10 groups available to you) enter a group to search for and click the **Search for Group** button. You can also search for a specific item from all available groups by entering the item ID and clicking the **Search for Item** button. If there are items in your shopping cart, the **View Shopping Cart** command appears in the side menu. Click **View Shopping Cart** to list its contents.

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### Order Entry Items HTML Screen



The items and subgroups that belong to the group you select appear. Units of measure and unit prices appear for items in the group.

- When you click on a subgroup ID, you see the items in that group.
- When you click on an item ID, the Order Entry Line Item page appears.
- When you click on a highlighted description, you see additional description information and an image of the item, if available (see page 8-21 for a sample of the additional descriptions page).

The screen lists up to 10 items and subgroups for the item group. If there are more than 10 items, the **Next** and **Previous** buttons appear. Click these buttons to scroll though the items and subgroups.

8-30 OSAS Web

You can also search for a specific item within any available group by entering the item ID and clicking **Search for Item**.

If there are items in your shopping cart, the **View Shopping Cart** command appears in the side menu. Click **View Shopping Cart** to list its contents.

If you close your browser or leave the Order Entry web pages, your shopping cart remains intact for 24 hours. When you return to the site within the allotted time period, you can resume your order entry from where you left off.

### Order Entry Line Item HTML Screen



Enter the quantity of the item you want to order and select the appropriate unit from the **Unit** list box. Enter **0** (zero) if you do not want to order this item.

After you specify the quantity you want, click **Recalculate**. OSAS Web B2B calculates the extended price for the quantity you ordered.

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When you are satisfied with the quantity and price, click **Add to Shopping Cart** to add the item to your cart. The Order Entry Items screen appears.

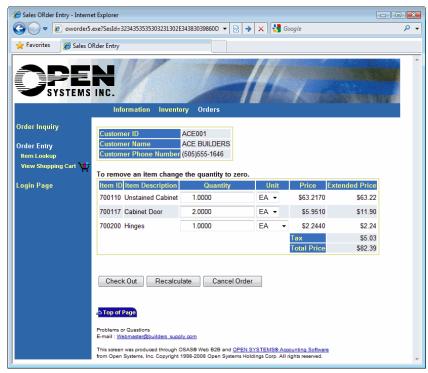
To abandon your entire order and empty your shopping cart, click **Cancel Order**. The Order Entry Group Codes page appears.

If there are items in your shopping cart, the **View Shopping Cart** command appears in the side menu. **Click View Shopping Cart** to list its contents so that you can review your order or check out.

If you close your browser or leave the Order Entry web pages, your shopping cart remains intact for 24 hours. When you return to the site within the allotted time period, you can resume your order entry from where you left off.

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# View Shopping Cart HTML Screen



The screen lists up to 10 line items for this order. If there are more than 10 items, the **Next** and **Previous** buttons appear. Click these buttons to scroll through the list of line items.

Review the items you ordered. You can change the quantity of any line item, or cancel a line item by changing the quantity to zero. If you change the quantity of a line item, click **Recalculate** to recalculate the order totals based on your changes.

To abandon your entire order and empty your shopping cart, click **Cancel Order**. The Order Entry Group Codes page appears.

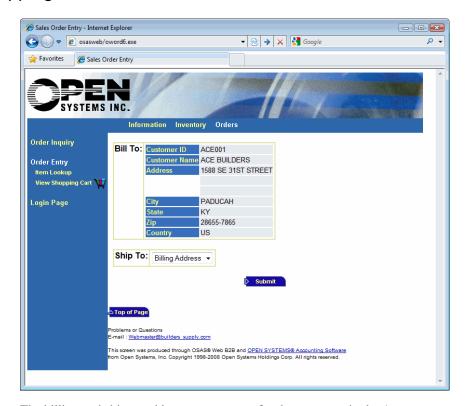
If you are a tax-exempt customer, but you must pay tax on this order, click **Change Order to Taxable** to calculate the sales tax for the order.

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When you are satisfied with your order, click **Check Out**. The Shipping Information page appears.

If you close your browser or leave the Order Entry web pages, your shopping cart remains intact for 24 hours. When you return to the site within the allotted time period, you can resume your order entry from where you left off.

### Select Shipping Address HTML Screen



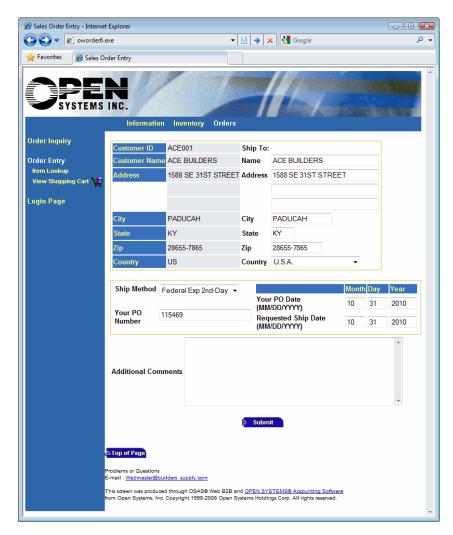
The billing and ship-to addresses you set up for the customer in the Accounts Receivable **Customers** and **Ship-to Addresses** appear in the **Ship To** list box (this list is limited by available memory). If you have not set up any ship-to addresses, only the customer's billing address appears in the list and is used as the default address.

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Select the address to which to ship goods. Click **Submit** to proceed to the Shipping Information page where you can verify and change shipping address data.

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### Shipping Address Information HTML Screen



Make corrections to the shipping information as necessary. Refer to the field definitions for descriptions of specific fields. When you finish, click **Submit** to process your order. After your order is submitted successfully, the Order Number Web Page appears.

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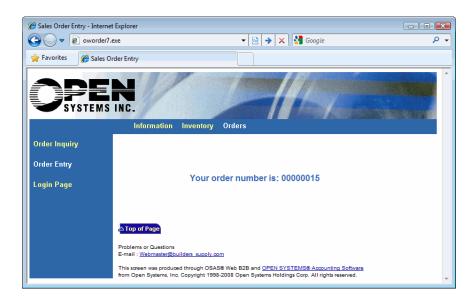
#### **Field Definitions**

Field Name	Description	
Name	Enter a company's or individual's name for the shipment.	
Address	Enter 1-3 lines of address information for the shipment.	
City/State/ Zip/Country	Enter the city, state, zip code, and country to which the shipment will be sent.	
Ship Method	Select a shipping method from the list presented.	
Your P.O. Number	Enter your purchase order number, if necessary.	
Your P.O. Date	Enter the date of your purchase order. Enter the month, day, and year in the appropriate fields.	
Requested Ship Date	Enter the date by which you want to receive the shipment. Enter the month, day, and year in the appropriate fields.	
Additional Comments	Enter any additional information you want to pass along about your order. You might use this field to specify alternative items, to request a rush order, to request a phone call before the order is shipped, and so on.	

If you close your browser or leave the Order Entry web pages, your shopping cart remains intact for 24 hours. When you return to the site within the allotted time period, you can resume your order entry from where you left off.

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### Order Number HTML Screen



The number assigned to the order appears. After you record the order number, you can close the browser to end your session, or choose a different menu selection from the side or top menus.

If you use remote processing, this number may change when you run the **Build Sales Orders from Remote Files** function (page 5-7) on the **Sales Order Processing** menu.

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## **APPENDIX A**



# System Messages

Access code {access code} for company {company ID} and customer {customer ID} does not exist.

The access code from which you are trying to copy is not set up for the customer and company entered. Check the access code and verify that it is set up correctly with the customer and company from which you are trying to copy.

Company is not set up for Internet Transactions.

You cannot use the **Build Sales Orders from Internet** function for a company listed as **Inactive**. Use the **Company Information** function on the Resource Manager **Company Setup** menu to change the **OSAS Web** status to **Active**.

Could not find *{file name}*. You may have problems running OSAS Web without this file.

A required file is missing. Without this file, some functions within OSAS Web B2B will not work properly. Make sure the required file is in the data path and try again.

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#### Could not find (file name). You may have problems running OSAS Web without this program.

A required program is missing. Without this program, some functions within OSAS Web B2B will not work properly. Make sure the required program is in the Resource Manager path and try again.

#### Could not find application information for Resource Manager.

The file **OSAPPL** is missing or corrupted. Make certain that **OSAPPL** is in your Resource Manager path and try the function again.

#### Customer {customer ID} already has internet access.

The customer is already set up within this group.

#### Destination directory cannot be the same as source directory.

The destination directory entered is the same as the source directory. Check for the correct destination directory and reenter it.

#### Internet access for {customer ID} in company {company ID} will be completely removed.

Use the **Delete** (**F3**)command to remove all access codes for the customer and the company or press **Enter** to abort this operation.

#### Internet access code {access code} will be removed.

Use the **Delete** (**F3**) command to remove the access code for the customer or press **Enter** to abort this operation.

#### Inventory must be installed to run the Print Inventory Item Groups list.

The OSAS Inventory application must be installed to use this function.

#### Inventory must be installed to run the Print Inventory Pictures list.

The OSAS Inventory application must be installed to use this function.

#### Item {item ID} is already set up.

The item ID you entered already has Internet access. Either enter a new item or edit the existing item entry.

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#### Line Item error: &,?, #, +, or ", these are reserved for internet use.

The code or ID you entered contains an invalid character. Reenter the code or ID without these reserved characters.

#### Master access code {access code} for company xxx does not exist.

The access code you entered is not set up for the company that you entered. Check the code to verify that it is set up correctly for the company from which you are trying to copy.

#### The file name cannot contain spaces.

The file name you entered for a graphic cannot have a space in it. Check the name of the picture file and reenter it.

#### Thru value must be greater than from value.

When you specify a range of items for a report, the **Thru** value you enter must be greater than or equal to the **From** value.

#### The code you want to use for a master password is already being used.

The master password you entered is already set up for one of your customers. Choose another password.

#### Access code {access code} is a master password.

The password you are entering for the customer is already set up as a master password. Choose another password.

#### There are no internet companies set up to make a login page for.

You must flag at least one company for Internet access using the **Company Information** function in Resource Manager before you can create your login page.

#### The last character of your path must be a 'l'.

The path entered is too long. The path name must end in a 'I'.

OSAS Web A-3

#### Unable to:

open data directory for the Web Server.
locate OWORDLOG log file.
open specified directory.
find SOTHxxx on Web Server Path.
find SOTDxxx on Web Server Path.
open specified directory.
open specified path for your home page.
open osasweb directory on the Web server.
open BBx directory to the server.
open osasweb directory on the Web Server.

The system was unable to find the path you entered. Find the correct path name and enter it.

#### You must have Sales Order installed to use Build Sales Orders.

The OSAS Sales Order application must be installed to use this function.

#### You must set up the data directory on the web server.

When you used the **Install Web Server Components** function, you did not enter the **Data File Path**. You must set up this path before you can use the **Build Sale Orders from Internet** function.

#### You cannot delete a group that has items set up for it.

The group code you are trying to delete has items set up for it. Use the **Internet Inventory Item Groups** function on the **File Maintenance** menu to delete all the items from this group.

#### You must have Inventory installed for this company to use item groups.

The OSAS Inventory application must be installed to use this function.

#### You must set up internet companies before setting up internet items.

The company for which you are trying to set up items does not have Internet access. Set up Internet access for the company before using this function.

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#### You must have Inventory installed for this company to use pictures.

The OSAS Inventory application must be installed to use this function.

#### You cannot delete a group that is currently set up under a customer.

The group code you are trying to delete has customers set up for it. Use the **Customer Groups** function to delete all the customers from this group.

#### You must run 'Install OSAS Web Components' first.

You have not run the Install Web Server Component Function from the Set Up Web Components menu. You must run this function before you can use any function on the Sales Order Processing menu.

#### You must set up the osasweb directory on the server first.

When you used the **Install Web Server Components**, you did not enter the **Web Server Programs Path**. This path needs to be set up before you can use this function.

#### You must set up internet companies before setting up customer groups.

The company for which you are trying to set up customer groups does not have Internet access. Set up Internet access for the company before using this function.

#### You must set up group codes before setting up customer groups.

The company you are trying to set up customer groups for does not have item group codes set up. Setup item group codes for the company before using this function.

#### You must have Accounts Receivable installed to set up customer groups.

The OSAS Accounts Receivable application must be installed to use this function.

#### You must have Sales Order installed to view the transaction journal.

The OSAS Sales Order application must be installed to use this function.

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#### You must have Accounts Receivable installed to set up this Company

The OSAS Accounts Receivable application must be installed to use this function.

#### You must have Sales Order installed to use purge log file.

The OSAS Sales Order application must be installed to use this function.

You must set up the BBx directory to the server first.

You did not specify the **Web Server Programs Path** using the **Install Web Server Components** function. This path must be set up before you can use this function.

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**APPENDIX B** 

B

## **Common Questions**

#### When I try to access the web, I get an error. Why?

A drive in your computer is mapped but not used by OSAS Web B2B and should be excluded in the CONFIG.BBX file. Add this line to your CONFIG.BBX file (specifying the appropriate drive letter):

#### dsksyn E:

Specify a **dsksyn** line for each drive mapped but not used by OSAS Web B2B. Read Appendix D for more help on editing your CONFIG.BBX file.

# How many users can access OSAS Web B2B at the same time?

The number of customers OSAS Web B2B allows to access your data depends on two things: your web server and the BBx interpreter. While the number of users depends on the program's limitations, you can control the number of users within certain parameters.

The web server can be set to allow only a limited number of users, depending on the server's capabilities. Consult your web server's guide for more help.

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Your BBx interpreter can handle a given number of users, depending on your activation key. If more than that number of users try to access functions in OSAS Web B2B at the same time, the users that logged on last will receive an error.

An interpreter session is only open for as long as it takes to load the HTML page. When the page is finished loading, the session closes, allowing another user to have access.

#### I set up item pictures and they don't show up. Why not?

While setting up your item pictures, you must set up the virtual paths linking the data to the display function screens. Check these two items:

- 1. You must set up a virtual path on the web server. The virtual path should be /image, with the actual path going to the directory where the images are stored. See your web server manual for more information.
- 2. You need to copy the image files into the directory on the web server to which the virtual path is mapped.

#### Can I use WIN CGI scripting calls with OSAS Web B2B?

No. Currently OSAS Web B2B only supports standard CGI scripting calls.

#### I run OSAS Web B2B at my Internet Solution Provider (ISP). How do I update my files?

Follow these steps:

- 1. Find out what directories the ISP is using for your OSAS Web B2B files. The directories you need to check are:
  - The actual path to which the **/osasweb** virtual directory is mapped.
  - The actual path to which the **/image** virtual directory is mapped.
  - The actual path of the document directory in which OPENHOME.HTM is located.
  - The directory where the data and OSAS programs are stored (if you do not store them in the **/osasweb** virtual directory).

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- 2. Create a *mirror web site*. A mirror web site is a copy of your web site, including file placement, that you may create on a separate computer at your location. Because it matches your ISP web site, you can use the mirror web site to create what your customers see when you personalize your site. This saves the potential down time that occurs when you test various OSAS Web B2B functions, solve problems, and make repeated web site modifications without constantly updating your ISP web site. When you update your files and functions, make your modifications to your mirror web site, check them, and then copy the updates to your ISP web site.
- 3. To update your login page, use the **Create Login Page** function and enter the path for the document directory on the mirror web site.
- 4. To update all the OSAS Web B2B programs, use the **Install OSAS Web Components** function, and set the paths to use the directories on the mirror web site.
- To update the remote data files and remote programs, use the Copy Data
   Files to Data Server and Copy OSAS Programs to Web Server functions.
   After completing these functions, set the ISP path to match the mirror web site.
- 6. To update the image files, copy them into the image directory on the mirror web site.
- When you finish updating your files on the mirror web site, you can use FTP (file transfer protocol) software to move all the files in each directory to the matching ISP directory.

#### I'm using .BMP file formats for my pictures and they don't display correctly.

Many Internet browsers do not support the viewing of bitmap (.BMP) images. You should try using .JPG or .GIF file formats instead. Files saved in these formats are better quality, show much more detail and, in addition to working better on browsers, load faster than a bitmap file.

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## **APPENDIX C**



# List of Files Copied

When you install the web server components, the following files are copied from the OSAS progOW path to the destination you entered. Some files are stored with different extensions to avoid duplication. These files are renamed to the correct extension when they are copied.

#### **BBX Programs**

These programs use input from users to look up data and create web pages:

**OWPASSWD.BBX** Verifies passwords

**OWMENU.BBX** Initialization program for the session

**OWARMENU.BBX** Creates the **Information** menu

OWINMENU.BBX Creates the Inventory menu

OWSOMENU.BBX Creates the Orders menu

**OWMNUBLD.PUB** Builds the side and top navigation menus

**OWLOOKUP.BBX** Calls a BBx program based on your choice from the

main menu

OWCUST.BBX Information—Account Information

**OWAGE.BBX** Information—Aged Trial Balance

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OWINV.BBX Information—Invoice Inquiry

OWINVPR1.BBX Information—Invoice Inquiry Detail

OWORDR.BBX Order Inquiry—Information

OWORD2.BBX Order Inquiry—Detail Information

OWORD6.BBX Order Entry—Select Shipping Address

**OWHIST.BBX** Information—Detail History Inquiry

OWINVL.BBX Item Inquiry—Group Code Breakdown

**OWITEMS.BBX** Item Inquiry—Items for the group code you selected

**OWPRCALC.BBX** Item price calculator

**OWPBRK.BBX** Item Inquiry—Price Break Information

OWADDL.BBX Additional Description/Picture

OWORDER.BBX Order Entry—Group Code Screen

**OWORDER2.BBX** Order Entry—Items for the group code you selected

**OWORDER3.BBX** Order Entry—Line Item Entry

**OWORDER4.BBX** Order Entry—Recalculate Prices and Submit Line

OWORDER5.BBX Order Entry—View/Submit Order

OWORDER6.BBX Order Entry—Recalculate Prices and/or Show Ship-

ping Information for submitting an order

**OWORDER7.BBX** Order Entry—Move an order into Sales Order

**OWPATH.BBX** Get the path of the BBx directory on the web server

OWSESS.PUB Verify the SESSION ID

**OWFILE.PUB** Set the template for the SESSION string

**OWPURGE.PUB** Remove all entries from the SESSION file that are

more than 24 hours old

**OWPC.BBX** Get period information from RMTB

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**UTHTMCON** Builds conditional hypertext links based on input pro-

vided from the calling program

**UTHTMFIL.BBX** Builds odd/even row coloration based on the stylesheet

#### **HTML Base Pages**

These files contain the framework for the HTML pages displayed to Internet users. The data requested by the users is merged into the framework by the programs listed above.

OWPASSWD.TXT Template text file for OWPASSWD.BBX

OWMENU.TXT Template text file for OWMENU.BBX

**OWBASE.TXT** Template text file for elements common to all screens.

OWCUST.TXT Used by OWLOOKUP

OWAGE.TXT Used by OWAGE.BBX

OWINV.TXT Template text file for OWINV.BBX
OWINVPR.TXT Template text file for OWINVPR.BBX

OWORDR.TXT Used by OWLOOKUP

OWORD2.TXT Template text file for OWORD2.BBX
OWORD6.TXT Template text file for OWORD6.BBX

OWHIST.TXT Used by OWLOOKUP
OWINVL.TXT Used by OWLOOKUP

**OWPBRK.TXT** Template text file for OWPBRK.BBX

**OWSESS.TXT** Invalid Session message

OWORDASK.TXT Continue/New Order message

OWORDER.TXT Template text file for OWORDER.BBX
OWORDER2.TXT Template text file for OWORDER2.BBX
OWORDER3.TXT Template text file for OWORDER3.BBX
OWORDER5.TXT Template text file for OWORDER5.BBX
OWORDER6.TXT Template text file for OWORDER6.BBX

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**OWORDER7.TXT** Template text file for OWORDER7.BBX

**OWBADQTY.TXT** Invalid Quantity message

**OWADDL.TXT** Template text file for OWPASSWD.BBX

OWITEMS.TXT Used by OWLOOKUP

OWBUSY.TXT Process Interrupted message
OWNOVIEW.TXT No Items to View message

#### Standard CGI Executables

These programs accept user input, start the BBx interpreter, and run the necessary OSAS Web B2B program. When the BBx program is finished, these programs load the resulting web pages:

OWMENU.EXE	OWORD2.EXE	OWORDER3.EXE
OWARMENU.EXE	OWORD6.EXE	OWORDER4.EXE
OWINMENU.EXE	OWPBRK.EXE	OWORDER5.EXE
OWSOMENU.EXE	OWADDL.EXE	OWORDER6.EXE
OWLOOKUP.EXE	OWORDER.EXE	OWORDER7.EXE
OWINVPR.EXE	OWORDER2.EXE	

#### Files Copied and Function in OSAS Web B2B

When you copy files from OSAS Web B2B, files are automatically created, renamed, and copied to in their destination drive. The tables below shows the original file name, the temporary file that is created and the final file name.

For a UNIX/Linux-based system, the files are:

Original File	Temporary File	Destination File
owmenu.tm2	Builds owmenu.sh	owmenu.exe
owarmenu.tm2	Builds owarmenu.sh	owarmenu.exe
owinmenu.tm2	Builds owinmenu.sh	owinmenu.exe
owsomenu.tm2	Builds owsomenu.sh	owsomenu.exe

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owlookup.tm2	Builds owlookup.sh	owlookup.exe
oword2.tm2	Builds oword2.sh	oword2.exe
owpbrk.tm2	Builds owpbrk.sh	owpbrk.exe
owaddl.tm2	Builds owaddl.sh	owaddl.ex
oworder.tm2	Builds oworder.sh	oworder.exe
oworder2.tm2	Builds oworder2.sh	oworder2.exe
oworder3.tm2	Builds oworder3.sh	oworder3.exe
oworder4.tm2	Builds oworder4.sh	oworder4.exe
oworder5.tm2	Builds oworder5.sh	oworder5.exe
oworder6.tm2	Builds oworder6.sh	oworder6.exe
oworder7.tm2	Builds oworder7.sh	oworder7.exe

For a Windows system, a temporary file is not created. The original file is copied and renamed to the destination file.

Original File	<b>Destination File</b>
OWMENU.TMP	OWMENU.BAT
OWARMENU.TMP	OWARMENU.BAT
OWINMENU.TMP	OWINMENU.BAT
OWSOMENU.TMP	OWSOMENU.BAT
OWLOOKUP.TMP	OWLOOKUP.BAT
OWORD2.TMP	OWORD2.BAT
OWORD6.TMP	OWORD6.BAT
OWINVPR.TMP	OWINVPR.TMP
OWPBRK.TMP	OWPBRK.BAT
OWADDL.TMP	OWADDL.BAT
OWORDER.TMP	OWORDER.BAT
OWORDER2.TMP	OWORDER2.BAT
OWORDER3.TMP	OWORDER3.BAT
OWORDER4.TMP	OWORDER4.BAT

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OWORDER5.TMP OWORDER5.BAT
OWORDER6.TMP OWORDER6.BAT
OWORDER7.TMP OWORDER7.BAT

For both UNIX/Linux- and Windows-based systems, the CONFIG file is the same and is not renamed.

**CONFIG.TMP** config.bbx

#### **BB Web Components**

Many BB Web components are copied directly to the Remote Access web server. Below is a list of the files copied.:

BBWEB.DOC	GENSMPL1	GENSMPL2	GENSMPL3
BBWEB.CNF	BBWEB.SH	BBWEB2.SH	BBWEBNT.PL
DEMOBBW.BBX	DEMOCENT.BBX	DEMOCLST.BBX	DEMOCLST.TXT
DEMOCUPD.BBX	DEMOILST.BBX	DEMOILST.TXT	DEMOMENU.TXT
DOSCGI.BAT	LICENSE.TXT	README	RSREAD.WBB
RSREADM.WBB	RSTTYS.LCK	RSTTYS.TXT	RSWATCH.SH
RSWATCH.WBB	STDCGI.EXE	UTACTV.WBB	UTADDR.WBB
UTCDATE.WBB	UTCDTF.WBB	UTCGI.WBB	UTCGIACC.WBB
UTCGIWIN.WBB	UTCNUM.WBB	UTCPROP.WBB	UTCSTR.WBB
UTENCODE.WBB	UTENTITY.WBB	UTENV.WBB	UTERR.WBB
UTEXIT.WBB	UTFRMGEN.WBB	UTFRMGN2.WBB	UTFRMIN.WBB
UTFRMOUT.WBB	UTHTMFIL.WBB	UTHTMGEN.WBB	UTHTMKEY.WBB
UTHTMOUT.WBB	UTHTMSEL.WBB	UTISIP.WBB	UTMETA.WBB
UTMMOIN.WBB	UTMMOOUT.WBB	UTMORE.WBB	UTSELECT.WBB
UTSEND.WBB	UTSUB.WBB	UTTABLE.WBB	UTTAGS.WBB
UTTEMPFL.WBB	UTTPLBAS.WBB	UTTPLCP.WBB	UTWATCH.WBB
WINCGI.BAT	WINCGI.EXE		

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## **APPENDIX D**



# **Editing Files**

You may need to edit certain files to set up remote processing or correct errors. This appendix demonstrates how to edit your CONFIG.BBX file, DOS batch files, and UNIX shell scripts.

### Modifying CONFIG.BBX

If you are using multiple drives and Remote Processing you may need to modify CONFIG.BBX to use the **dsksyn** command. If your data lies outside the current directory, you must add the **prefix** command.

#### **CONFIG.BBX**

stblen=3072

fcbs=70

handles=70

cibs=70

USE\_LIM

aliases=20

dsksyn a

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dsksyn b

prefix /httpd/ /httpd/bbx/ e:/progrm/

There are two important settings to know about when you set up the CONFIG.BBX file: **prefix** and **dsksyn**.

If you have the data files in a different path than the BBx directory, you should specify this in the prefix by entering the full path name of the location where the data files reside. Make sure that you use forward slashes and end the path with a forward slash ('/'). If the interpreter is on a different path than the BBx directory, you will need to add that path to the prefix also. Separate multiple prefix entries with a single space.

If a prefix refers to a different drive than the root drive, you must use the **dsksyn** command. This command lets BBx know it can skip looking in a particular drive. For example, imagine you use drives A, B, C, D, and E, and you keep your data files on drive E and server information on drive C. You must enter the **dsksyn** command for drives A, B, and D to avoid errors. When you enter multiple **dsksyn** settings, you must enter each command on a separate line.

### Modifying Batch and Script Files

If the interpreter is on a different path than the BBx directory, you will need to change the four .BAT files on DOS; if you are using UNIX, you will need to change the four .EXE scripts.

#### **DOS Changes:**

All of the DOS batch files in OSAS Web B2B are similar. The MENU.BAT file is shown here. You can make similar changes to the other batch files.

#### OWMENU.BAT:

@echo off

rem This batch file will work under O'Reilly Website's DOS CGI interface.

rem You can make copies under any name you want, and execute it via

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```
rem http://cgi-dos/name.bat. Each copy can be associated with a BBx
rem program.
rem set BBPROG to be your BBx program, BBEXEC, BBCONFIG, and MEM
for rem BBx startup.
set BBPROG=owmenu.bbx
set BBEXEC=c:\server\bbx\vpro5.exe
   This line must contain the full path to the interpreter.
set BBCONFIG=config.bbx
set MEM=1024 -q
set BBTERM=IO
set USERID=osasweb
if "%os%"=="Windows_NT" goto NT:
rem Win 95 - Website uses OUTPUT_FILE
if "%REQUEST_METHOD%"=="POST" goto WIN95CONTENT
\%BBEXEC\% -m\%MEM\% \ \%BBPROG\% >\%OUTPUT\_FILE\% -doscgi
goto DONE
:WIN95CONTENT
%BBEXEC% -m%MEM% %BBPROG% <%CONTENT_FILE%
>%OUTPUT_FILE%
goto DONE
:NT
rem Win NT - Website uses stdout
```

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```
IF "%REQUEST_METHOD%"=="POST" goto WINNTCONTENT
```

%BBEXEC% -m%MEM% %BBPROG%

goto DONE

:WINNTCONTENT

%BBEXEC% -m%MEM% %BBPROG% <%CONTENT\_FILE%

:DONE

#### **UNIX changes:**

All of the UNIX script files in OSAS Web B2B are similar. The MENU.EXE file is shown here. You can make similar changes to the others script files.

#### OWMENU.EXE:

# Set PGM and MEM to desired values for the bbx program and start size.

# (these can be set in another script, that execs this one.)

PGM=OWCUST.BBX

MEM=512

# modify these values per your bbx configuration

MAXTRIES=5

ERRORLOG=/usr/local/etc/httpd/bbx/error.log

CONFIG=/usr/local/etc/httpd/bbx/config.bbx

BBXEXEC=/usr/local/etc/httpd/bbx/pro5

This line must contain the full path to the interpreter.

MEM=\${MEM:=512}

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```
if [ "$PGM" = "" ]
then
echo "Content-type: text/plain"
echo ""
echo "Invalid pgm argument"
exit
fi
umask 0
RETRIES=0
until [ $RETRIES -gt $MAXTRIES ]
do
BBXEXEC\ -q\ -c\ CONFIG\ -m\ PGM\ -\ "\ @"\ 2>/tmp/bberr.
if [ -s /tmp/bberr.$$]
then
RETRIES='expr $RETRIES + 1'
sleep 1
read msg </tmp/bberr.$$
rm /tmp/bberr.$$ 2>/dev/null
else
RETRIES=99
```

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```
rm /tmp/bberr.$$ 2>/dev/null

fi

done

if [! "$RETRIES" = "99"]

then

echo 'date' $msg >>$ERRORLOG 2>/dev/null

echo "Content-type: text/plain"

echo ""

echo "The database server is too busy. Sorry about that."

echo "Please try again later."

echo ""

echo "By the way, we have recorded this problem, and will add"

echo "capacity if it happens frequently."
```

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APPENDIX E

## Files for Remote Access

Remote access provides you greater security than the standard OSAS Web B2B setup. By physically separating your company's web server from the data storage, your Internet customers are allowed access to only the information you specify. To do this, you must copy specific files from the main computer—where the OSAS information is stored—to the remote terminal, where the web server resides.

The information stored on the web server is separated into two groups. The first group is the data files; the second group is the public programs.

### Copy Data File to Web Server

To copy the data files needed by OSAS Web B2B, use the **Copy Data Files to Web Server** function to copy these files to the remote server:

ARCDx	ARCTx	ARCUx	ARINx
INAIx	INCAx	INCLx	INGLx
INHSx	INLDx	INLOx	INLPx
INLTx	INPPx	INPSx	INQLx
INQTx	INSNx	INTB	INTXx
INUMx	INUPx	INVEx	OSAPPL

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OSCN	OSCOMP	OSINFO	OSTPL
OWCC	OWCGx	OWICx	OWIIx
OWGCx	OWTB	RMGCx	RMTDx
RMTHx	SODEx	SOTB	SOTDx
SOTHx			

You also have the option to copy the **ARHIX** file, which stores the customer's detailed transaction history. During the initial installation, you must copy this file, which is necessary for the **History** and **Invoice Inquiry** functions. Later, you can skip copying this file, because it can grow quite large and, depending on your computer system, can take quite a long time to copy.

## Copy Programs to Web Server

Use the **Copy Programs to Web Server** function on the **Remote Access** menu to copy these programs:.

GENGETOP.PUB	GENOPEN.PUB	GENTAX.PUB
INCALCPR.PUB	INUPD.PUB	INUPDSET.PUB

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