MICROSOFT® BUSINESS SOLUTIONS NAVISION® 4.0

COURSE 8421A: COMMERCE PORTAL

PREFACE

Welcome

Training is a vital component of retaining the value of your Microsoft[®] Business Solutions investment. Our quality training created by industry experts keeps you up-to-date on your solution and helps you develop the skills necessary to maximize the value of your solution. Whether you choose Online Training, Classroom Training, or Training Materials, there is a type of training to meet your needs and learning style. Choose the training that best suits you so you can stay ahead of the competition.

Online Training

Online Training delivers convenient, in-depth training to you in the comfort of your own home or office. Online training provides immediate access to training 24 hours a day. It is perfect for the customer who does not have the time or budget to travel. Our newest online training options, eCourses, combine the efficiency of online training with the in-depth product coverage of classroom training, and provide at least two weeks to complete each course.

Classroom Training

Classroom Training provides serious, in-depth learning through in-class interaction. From demonstrations to presentations to classroom activities, you gain hands-on experience with instruction from our certified staff of experts. Regularly scheduled throughout North America, you can be sure to find a class convenient for you.

Training Materials

Training Materials enable you to learn at your own pace, on your own time, with information-packed training manuals. Our wide variety of training manuals feature an abundance of tips, tricks, and insights you can refer to again and again.

Microsoft Business Solutions Courseware: These detailed training materials are designed by experienced trainers. These manuals include basic through advanced topics as well as training objectives, exercises, interactions, and quizzes.

Look for a complete list of manuals available for purchase on the Microsoft Business Solutions website: www.microsoft.com/BusinessSolutions.

Microsoft Business Solutions Courseware Contents

Test Your Knowledge

Within the Microsoft Business Solutions Training Courseware you may find Test Your Knowledge review questions to reinforce learning concepts. Review questions are located at the end of the chapter and the answers to these questions can be found in Appendix A, which is located at the end of the manual.

Exercises

Within the Microsoft Business Solutions Training Courseware you find a variety of exercises. The exercises in this course are based on the demonstration Web portal installed with Commerce Portal and the demonstration data provided by Microsoft Business Solutions.

Quick Interaction: Lessons Learned

At the end of each chapter within the Microsoft Business Solutions Training Courseware there is a Quick Interaction: Lessons Learned page. This interaction is designed to provide the student with an opportunity to reflect on the material they have just been exposed to. By outlining three key points from the chapter, the student can maximize knowledge retention, and provide themselves with an excellent resource for review.

Student Objectives

What do you hope to learn by participating in this course?

List three main objectives below.

1.

2.

3.

CHAPTER 1: INTRODUCTION

- Overview
- Commerce Portal Course Prerequisites
- Overview of Commerce Portal
- Key Features of Commerce Portal

Overview

This chapter provides basic background information about Microsoft® Business Solutions−Navision® Commerce Portal.

Commerce Portal Course Prerequisites

Before using this course, you must install Microsoft Navision, Commerce Portal and a number of Microsoft products. These products provide the functionality needed to practice using Commerce Portal.

Microsoft Products

All Microsoft products must be installed and configured before you can use Commerce Portal. For instructions on how to install and configure these products, see the manual Installation & System Management: E-Commerce Solutions.

The following Microsoft products must be installed:

- Microsoft® Windows® 2000 Server, Service Pack 3 (Check to make sure that you have installed the components for Microsoft Message Queuing Services.)
- Microsoft® Internet Information Server 5.00 (included with Windows 2000 Server)
- Microsoft® SQL Server® 2000, Service Pack 3 + Analysis Services, Service Pack 3
- Microsoft® Internet Explorer 5.5, Service Pack 1
- Microsoft® XML 3.0, Service Pack 2
- Microsoft® Commerce Server 2000, Service Pack 2
- Microsoft® Business Solutions−Navision® Database Server 4.0
- Microsoft® Business Solutions−Navision® Client 4.0
- Microsoft® Business Solutions−Navision® Application Server 4.0
- Commerce Portal Web Integration Components 4.0

NOTE: You must install non-localized versions of all the Microsoft products.

Microsoft Navision

You must install and configure a Navision server, a Navision client and a Navision Application Server before you can begin using this course. For instructions, see the manuals "Installation & System Management: Microsoft Business Solutions−Navision Database Server" and "Installation & System Management: Microsoft Business Solutions−Navision Application Server."

Commerce Portal

You need to install Commerce Portal. For instructions, see the manual "Installation & System Management: E-Commerce Solutions."

All the necessary ASP files that are the basis of the demonstration Web portal in Commerce Portal are installed automatically when you install Commerce Portal.

Overview of Commerce Portal

The following picture illustrates how Microsoft Navision and the installed Microsoft products are linked together.

Technical Architecture of Commerce Portal
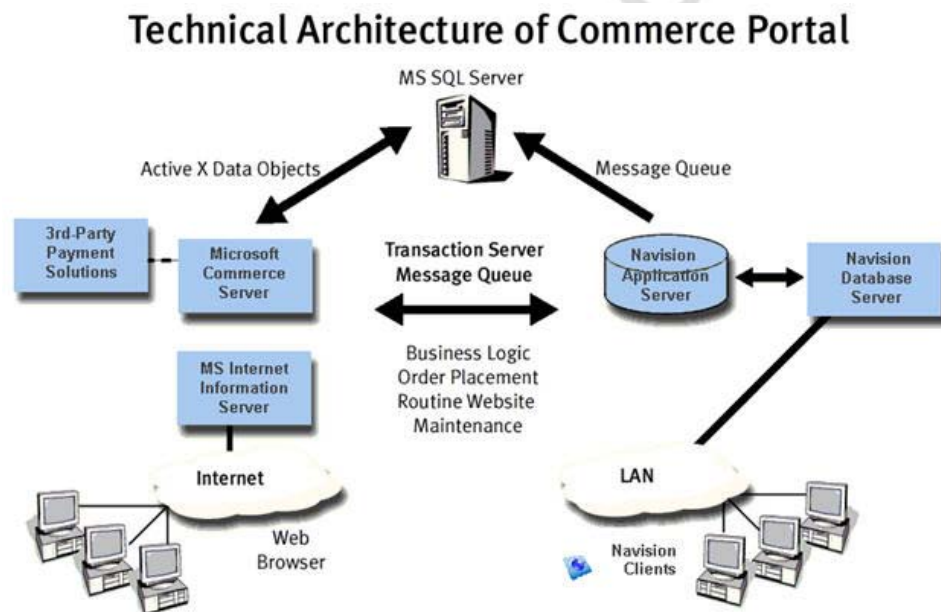
Clients

There are two sets of clients involved in using Commerce Portal:

- Microsoft Navision clients that are connected to your company's local area network and are used by you and your colleagues.
- Web browsers that are connected to the Internet and are used by the users of your Web portal.

Microsoft Navision clients do not have to be dedicated specifically to the Commerce Portal. These clients can act as normal Microsoft Navision clients because all information requested or created through the Internet on your Web portal is processed like any other information in Microsoft Navision.

Web browser clients can be of any type and can be started from any platform. The design of your homepage determines the requirements for Web browsers, for example, whether or not Web browsers have to support frames.

Communication

All communication between Microsoft Navision, Microsoft Commerce Server, and Microsoft SQL Server is done using Microsoft Message Queue Server.

Services

All data is maintained in Microsoft Navision. Data used in the Web portal is synchronized with Microsoft SQL Server. After the first synchronization is carried out, the SQL Server is synchronized every time you update information in Microsoft Navision that is relevant for the Commerce Portal. For example, changing the name of an item automatically creates a message that updates the item name in the SQL Server database.

When a user who is signed in on your Web portal requests information about a specific item, the static data − such as item number and item name − is retrieved from the SQL Server database. In comparison, the variable data − such as item price and item availability − is retrieved from the Microsoft Navision database.

When a user who is not signed in browses your Web portal and requests information, or when a connection with the Microsoft Navision database cannot be made, only information available on the SQL Server will be retrieved and shown to your Web portal user. A connection cannot be made if Navision Database Server or Navision Application Server is not running.

You can read more about how to synchronize the Microsoft Navision database and the SQL Server database later in the course.

Microsoft Internet Information Server and Microsoft Commerce Server provide functionality that allows end users using Web browsers to access your Web portal and request and create information in Microsoft Navision. These requests are then passed on as messages, through the Message Queue Server to the SQL Server database and the Microsoft Navision database, which processes and replies to the messages. The Web portal users then receive an answer to their request, or a notification confirming the receipt of the information.

A line of third-party payment solutions is available for Microsoft Commerce Server as plug-ins. These plug-ins provide a high level of security and make Commerce Portal very flexible. You do not have to choose one or two specific payment solutions − just install the payment solutions as needed.

Key Features of Commerce Portal

This section describes some Commerce Portal features. Each of these features will be described more thoroughly in the following chapters. This chapter provides only a brief introduction to each feature to give you an enhanced overview of Commerce Portal. The following are key features of Commerce Portal:

- Data is maintained only in Microsoft Navision.

- You can create multiple websites.

- You can define the permissions for your Web portal users based on roles.

- You can set up automatic e-mail notifications to Web portal users and colleagues in connection with specific events in the process of handling a sales or purchase order.

- You can set up specific language-dependent text and descriptions, to be used on your Web portal.

- You can increase the efficiency of your purchasing activity by listing items you want to order on your Web portal and inviting your vendors to participate in a reverse auction.

- Web pages are maintained from within Microsoft Navision.

- Commerce Portal has full integration with the rest of the Navision Application.

- Commerce Portal supports the picture formats GIF and JPG.

Maintaining Data

To work with Commerce Portal, Microsoft Navision users do not have to familiarize themselves with a new user interface. From Microsoft Navision, they can update the Web portal user and item information, handle sales quotes, sales orders, reverse auctions, and other similar activities.

However, customer information on the Customer card and Contact card can also be maintained from the Web portal. For example, while you are visiting your customers.

All data relevant to the Commerce Portal is synchronized with (copied to) the SQL Server database so that the data is actually stored in both the Microsoft Navision database and the SQL Server database. The program automatically synchronizes the SQL Server database and, subsequently, the Web pages on your Web portal with the Microsoft Navision database.

Multiple Websites

With Commerce Portal, you can create multiple websites. For example, you can create a new website while the old one is still online. In addition, you can set up the templates for copying basic information to the different types of users on the website. You can also define which notification processes are to be used for the website.

Roles and Permissions

Commerce Portal allows you to create Web portal users, give them roles, and modify the rights of these users and roles from within Microsoft Navision. This means that several types of Web portal users can do business activities with your company or browse in your Web portal. Different roles have different permissions to perform different activities, such as business, maintenance, or administration activities.

E-Mail Notification

In Commerce Portal, you can set up various notifications. These notifications are used, for example, in the following circumstances:

- To notify the users of your Web portal of specific events or of the status of their orders and offers, and of their new password and/or user ID.

- To notify yourself or your colleagues of information entered by users of your Web portal.

During processing of information entered by a Web portal user, you might want to send information or status reports to that user. This is done by setting up notifications for each step that the different information types can go through: for example, confirmation of a sales quote; shipping of a sales order; confirmation of an offer made on a reverse auction; or the creation of a Commerce Portal user ID and password. For each notification, you can write one or more texts that will automatically be sent to the customer via e-mail. For example, whenever a sales order is shipped, the Web portal user automatically receives an e-mail saying so.

The same functionality is used to inform your colleagues of the creation of new Web portal users, new sales quotes, or new offers on reverse auctions. One of your colleagues or a group of your colleagues will then receive an e-mail, for example containing information about the new Web portal user, new sales quote, or new offer on the reverse auction.

Multilanguage

You can set up specific language-dependent text and descriptions to be used on your Web portal when the Web portal user's language is other than the standard language of your Microsoft Navision installation. Commerce Portal automatically uses the text and descriptions defined for the chosen language in the Multilanguage table and in the Item Translation table.

Reverse Auction

You can ease your purchasing process by creating a reverse auction. A reverse auction is when you put a demand for purchasing products to one or more vendors on the Web portal. The participating vendors can then respond to your auction by placing an offer on the Web portal; stating delivery time, quantity, and price.

Maintaining Web Pages

When your Web portal is up and running you might want to make adjustments or changes. For example, you may want to change the welcoming text that greets the Web portal users when they open the first page of your Web portal. This is easily done from within Microsoft Navision. You do not have to change the text in the HTML code, nor do you need the assistance of an ASP programmer. You simply change the text as you would change the text in any other application area of Microsoft Navision. You can also change the pictures on your Web pages within Microsoft Navision.

Integration

Commerce Portal is fully integrated with the rest of the Microsoft Navision application areas.

This means that if, for example, a new customer places an order through your Web portal their customer information will automatically be inserted in the Customer table in the Microsoft Navision database. When you set up your website, you define templates for each of your different types of Web portal users. The information on the templates will be copied to the new user. The templates can contain basic information that you want all new users created through your Web portal to have, as well as the permissions you want to grant them.

If an existing Web portal user places an order through your Web portal, they receive all discounts that they are entitled to. In fact, everything will work just as if the order was entered manually in the Sales Quote window in Microsoft Navision. You can even grant trusted customers permission to create sales orders. Or, you can choose to reject or accept the sales quotes manually.

By using their user ID and password, each Web portal user can sign in to your Web portal and view their previously entered information. For example, they can view orders, credit memos, offers on reverse auctions, and financial statements. Depending on how you have set up your Web portal, users can also reorder items on the basis of previous orders. It is also possible for Web portal users to monitor the status of their current orders or offers.

There is no separate table for the items you sell through your Web portal. All maintenance and updating is done using the Item card in the Inventory application area of Microsoft Navision. So, whenever you update your prices, or the name or the availability of an item is changed, it will have an immediate effect on your Web portal.

An order placed on your Web portal is no different than one created from within Microsoft Navision; there is full integration with the general ledger through posting.

A sales order placed by a Web portal user is posted like any other sales order in Microsoft Navision, and will therefore result in the same general ledger entries, customer ledger entries, item ledger entries, and so on.

Test Your Knowledge – Introduction to Commerce Portal

1. Before you can begin this course you must install _____, _____, and a number of _____.

2. Name the two sets of clients involved in using Commerce Portal and describe their functions.

3. Briefly describe some of the synchronization features between Microsoft Navision and Commerce Portal.

4. Name a few of the key features of Commerce Portal.

5. Do users need to learn a new interface in order to use Commerce Portal? Please explain how data can be maintained in Microsoft Navision and Commerce Portal.

6. Explain when an email notification might be used.

7. Briefly describe some of the integration between Microsoft Navision and Commerce Portal.

Quick Interaction: Lessons Learned

Take a moment to write down three Key Points you have learned from this chapter:

1.

2.

3.

CHAPTER 2: SETTING UP COMMERCE PORTAL

- Overview
- Setting up Commerce Portal
- Setting up Navision Application Server
- Setting up a Website
- Setting up Web portal Roles and Permissions
- Setting up Notification Processes
- Setting up Web Templates

Overview

After you have completed the installation of the required Microsoft® Business Solutions−Navision® products and Microsoft Navision servers and clients, there are a number of parameters in the Microsoft Navision Commerce Portal application area that you have choose. This chapter describes how to set up Microsoft Navision Commerce Portal.

NOTE: Be sure that one instance of Navision Application Server is installed prior to beginning this chapter.

Setting up Commerce Portal

Before starting to use Commerce Portal, you must enter certain basic setup information that will apply to all of your websites. You also have to set up a website, roles, notification processes, Web Templates, synchronization, requests, and the Navision Application Server. These topics will be described in the following sections.

The following diagram illustrates the framework on which Commerce Portal is built.
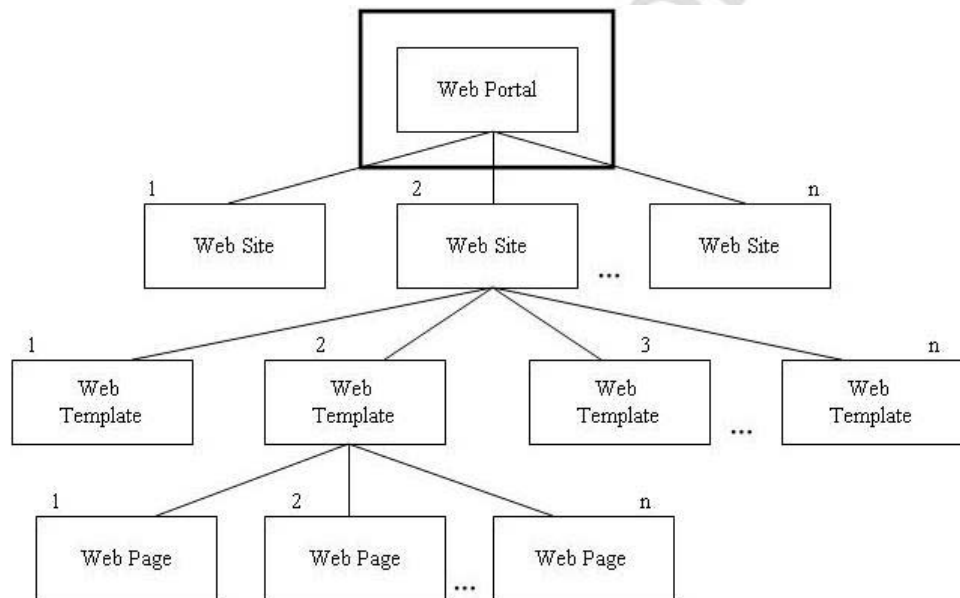
Setting up Commerce Portal includes:

- Information about your country, local currency, and decimal symbol.
- Information about where to store pictures on the Web server as well as information used to communicate with the SQL Server.
- Information about the number series in Commerce Portal.

The Commerce Portal Setup Window

Follow this procedure to enter information in the Commerce Portal Setup window:

1. On the Administration menu, click APPLICATION SETUP→COMMERCE PORTAL→COMMERCE PORTAL SETUP. The Commerce Portal Setup window appears.

   Microsoft Navision does not use a currency code to specify the local currency (LCY). The local country and language are not set up and are represented by blank fields. In order to give your Web portal users the choice of your local currency and language, you must specify these in the relevant fields on the **General** tab.

2. On the **General** tab, in the **Currency Code** field, enter the LCY code from the General Ledger Setup window. When a user signs in to your Web portal using their user ID and password, the currency code on the customer or Vendor card determines which currency is used. If the **Currency Code** field on the customer or Vendor card is blank, the code that you specify here is used.

3. In the **Currency Description** field, enter a description of your local currency. The Web portal user selects, from a list, the currency that they would like prices to be displayed and invoiced in. This list is based on the Currencies window in Microsoft Navision, but because the local currency is not defined there, the description you enter here will be used as the LCY.

   The same principle applies to the next fields. Because your country and language is not defined in the Country table and Language table in Microsoft Navision, the description you enter here defines your default country and language. This information appears on the list from which the Web portal user must select their country and language.

4. In the **Decimal Symbol** field, enter the decimal symbol you have selected in your Windows regional settings. The content of this field defines the decimal symbol of the data synchronized to the SQL Server.

5. Click the **Communication** tab.

6. In the **Picture Target Folder** field, enter the path and name of the folder on the Web server where you want Microsoft Navision to save your pictures.

   Commerce Portal uses this path to save pictures on the Web server converted to GIF or JPEG format. The pictures displayed on your Web portal are not actually saved in the SQL database. Due to performance considerations, Microsoft Navision saves the pictures like any other file, in the file system on the Web server.

The first part of the path, also referred to as the virtual root, corresponds to the Web publishing home directory defined during installation and configuration of the Microsoft Internet Information Server. Attached to this path is the path of the subdirectory in the virtual root, where the pictures are saved.

Pictures for use on your Web portal can be maintained in Commerce Portal.

7. In the **Data Source** field, specify the SQL Server Instance name. If you are running your Web portal on the same server as your SQL Server the name must be localhost.

8. In the **Initial Catalog** field, enter the name of catalog that is used on your Web portal.

9. In the **SQL User ID** field, enter the SQL user ID that the synchronization service must use to connect to the SQL Server.

10. In the **SQL Password** field, enter the password of the SQL user ID.

11. Click the **Numbering** tab.

12. In the **Picture Nos.**, **Contact Nos.**, and the **Reverse Auction Nos.** fields, enter a number series. This is done in the same way, as you would define any other number series in Microsoft Navision.

Exercise – Changing the Password for SQL Server Logon

In this exercise, you change the security settings to match the SQL Server settings.

1. On the Administration menu, click APPLICATION SETUP→COMMERCE PORTAL→COMMERCE PORTAL SETUP. The Commerce Portal Setup window appears.

2. Click the **Communication** tab.

3. In the **SQL Password** field, enter a new password for the SQL User ID.

4. Restart Navision Commerce Portal Synchronization service.

The password you entered must be the same as the password registered on the SQL Server. Otherwise, you experience a lot of error messages in the Error message queue (Microsoft Message Queuing).

For this training session, the SQL Server probably does not have a password for the sa account so you should clear the password settings that you just made. You should never use the sa account in real life, instead create your own SQL database account with Commerce Portal database rights.

Setting up Navision Application Server

For your Web portal to communicate with Microsoft Navision the following communication components must be defined in Microsoft Navision:

- Navision Application Server
- Synchronization
- Request

Setting up the Navision Application Server

In Commerce Portal, the Navision Application Server is used to handle the communication between Microsoft Navision and the Web portal. You can set up one or more application servers to handle the communication. In the Application Server Card window you define which part of the communication the application server handles.

If you only have a limited number of messages sent between Microsoft Navision and your Web portal every day, one application server can handle all the communication. You must define setup codes for synchronization, requests, and mail, all on one application server.

But if you have a high load of communication, you can ensure a high performance by installing more than one application server; for example, by dedicating one application server to handle only the requests from the Web portal.

In the Application Server Card window, you can also define if you want the communication to be logged. In the **Log Requests** field, insert a check mark so that the program will log the messages that are defined in the Message Log Setup List window. If you insert a check mark in the **Log Synchronization** field, all synchronization of data from Microsoft Navision to the SQL database will be logged.

You can read more about installing the Navision Application Server in the "Microsoft Business Solutions–Navision Installation & Configuration" manual.

Setting up Synchronization

On the Administration menu, click APPLICATION SETUP→COMMERCE PORTAL→SYNCHRONIZATION. The Synchronization Setup Card window appears.

In the Synchronization Setup Card window, define message queues to handle the synchronization from Microsoft Navision to your Web portal, as well as the label registry key and how often the program will check whether to synchronize data to the SQL database.

Setting up Requests

On the Administration menu, click APPLICATION SETUP→COMMERCE PORTAL→REQUEST. The Request Setup Card window appears.

In the Request Setup Card window, define how you want the requests and the replies to your Web portal handled by the message queues. You must define an incoming queue to take care of the requests from your Web portal, and define an outgoing queue to take care of the replies sent from Microsoft Navision to your Web portal. You must also define a label registry key for where to find labels and queue names and you must enter the length of time that replies can remain in the queue before they are deleted.

Setting up Mail

In the Mail Setup Card window, define how you want your out-going e-mails to be handled. You can define the time interval at which the program will check whether any e-mails are waiting to be processed and whether the queue is open to send e-mails or not. You can set up the mail queue to prioritize the mails according to the priority on the Contact Card.

Setting up the Log

On the Administration menu, click APPLICATION SETUP→COMMERCE PORTAL→MESSAGE LOG. The Message Log Setup List window appears.

The Message Log Setup List window contains all the message types that can be sent between Microsoft Navision and your Web portal. You can define which messages you want to be logged and in which direction. A check mark in the **Log Requests** field in the Application Server Card window activates the logging.

Exercise – Enabling Logging of Synchronization Messages

In this exercise, you enable the logging of messages sent to the Commerce Server. To verify that the synchronization messages are sent correctly to the SQL Server, you can enable the logging.

1. Open the Application Server Card window.

2. Click the **Actions** tab.

3. In the **Log Synchronization** field, select the option.

   After you have enabled the logging of Synchronization messages, you need to restart the Navision Application Server service in order to see the messages.

4. To see the Synchronization messages, on the Administration menu, click IT ADMINISTRATION→COMMERCE PORTAL→COMMUNICATION→ MESSAGE LOG. The Message Log window appears.

Setting up a Website

After you have set up the general information for Commerce Portal, you are ready to set up any number of websites, each of which can have a different layout, sell different items, or target different user groups.

This diagram shows how the websites you create comprise your Web portal.
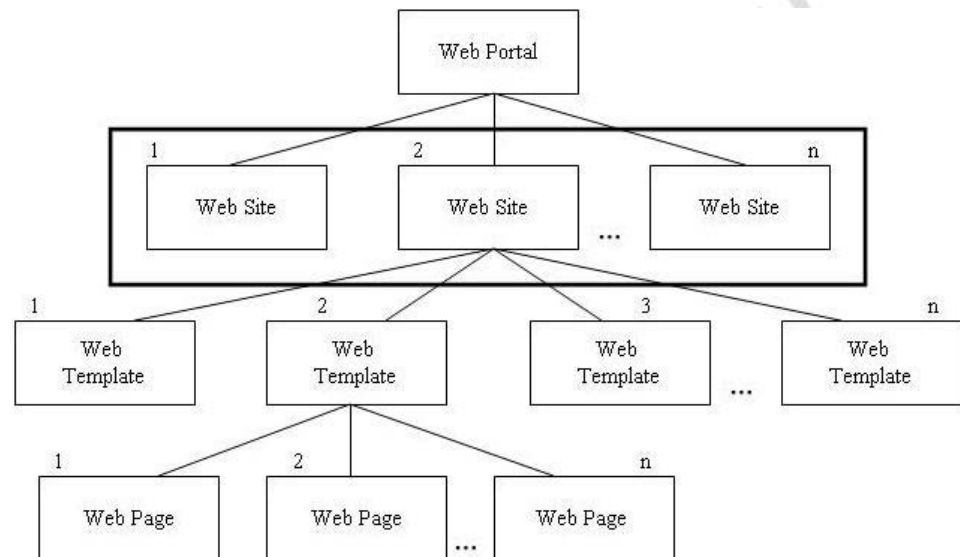
To set up your website, you must create a website card containing the following information:

- The address of your homepage.
- The path to the ASP files on the Web server.
- A quote expiration calculation formula.
- The profiles of template users.
- Notification codes and processes.
- Number series for users and orders created through your Web portal.

Exercises

In these exercises, you create a new website. However, in order to allow your Web portal users to enter your Web portal while you are working on the new one, you must have your old website running.

The layout of the new website will be identical to the old one, so in order to avoid retyping all the information, use the batch job request window to create your new website.

Creating a Website

1. On the Administration menu, click APPLICATION SETUP→COMMERCE PORTAL→WEB SITES. The Web Site Card window appears.

2. On the Edit menu, **Insert New** (or press F3) to insert a new website.

3. On the **General** tab, in the **Code** field, enter an identifier, for example, New Home.

4. To use the Copy Web Site batch job, click FUNCTIONS→COPY WEB SITE. The Copy Web Site batch job request window appears.

5. In the **Copy-from Web Site Code** field, click the **AssistButton** to view a list of websites. The Web Site List window appears.

6. Click the website that you want to make a copy of, for example, Home, and then click **OK**.

7. In the **Include Web Site Setup**, **Include Web Templates**, and **Include Web Pages** fields, select the options.

8. Click **OK** to start the batch job.

9. When the batch job is complete, close the Copy Web Site batch job request window.

10. Verify that all information has been copied from the Home website to your new website.

Setting up Web Portal Roles and Permissions

Commerce Portal allows you to create Web portal users, give them roles and modify the rights of these users and roles from within Microsoft Navision.

In order to create Web portal users, you must give them an identity within Microsoft Navision that allows them to log on to your Web portal. When the user has logged on to your Web portal, they are able to perform tasks according to the permissions that they have been allocated.

Permissions

Each permission grants the Web user authorization to perform a task or a part of a task on your Web portal. All permissions are based on Microsoft Navision information and/or some functionality that will help the user perform a task. The permissions are predefined in Commerce Portal and can be assigned to the Web portal user as a part of a role.

NOTE: You can add new permissions to the Permissions table. However, it is not enough to just do this. You must also have a programmer create a new function in the related codeunit and/or a new Web page that can handle the new permission.

Web Portal Roles

Before you welcome your users in your Web portal, you must define which tasks your Web portal user must be able to perform, and afterward, create the roles according to this definition.

A role is a collection of permissions that you can combine in any way that meets your needs.

You can choose to set up a few general roles, each containing all the permissions for one user type, or you can set up a role for each task or part of a task that the users will perform and then customize each user's rights and possibilities.

Exercise – Scenario

You have decided that you will give some of your partners access to information about your inventory. In this exercise you create a new partner role and add the additional permissions to it.

Creating a New Web portal Role

1. On the Administration menu, click APPLICATION SETUP→COMMERCE PORTAL→WEB PORTAL ROLES. The Web portal Roles window will appear.

2. On the Edit menu, **Insert New** (or press F3) to insert a new Web portal role.

3. In the **Code** field, enter an identifier, for example prtnr2.

4. In the **Description** field, enter Partner 2.

5. Click the existing partner role named PRTNR.

6. Click ROLE→PERMISSIONS. The Web portal Role Permissions window for PRTNR appears.

7. Select all the permissions assigned to the PRTNR role and copy (CTRL+C) them.

8. Escape back to the Web portal Roles window.

9. Click your new role (PRTNR2) and click ROLE→PERMISSIONS.

10. Paste (CTRL+V) the copied permissions into this role.

11. Insert (F3) a new line.

12. In the **Code** field, click the **AssistButton**. The Web portal Permissions List window appears.

13. Locate and select the permission number 10058, Availability Numeric.

14. Click **OK** to add the permission to the role.

Setting up Notification Processes

When you create a website, you can choose a set of notification processes and codes to be used when certain events occur on your Web portal or in Microsoft Navision. These notifications can be divided into two groups:

- Internal notifications – To notify you or your colleagues
- External notifications – To notify your Web portal users

A notification code identifies a number of text lines that can be sent by e-mail to your Web portal users or your colleagues. Basically, notification codes are a set of e-mail templates.

Internal Notifications

Internal notifications relate to you or your colleagues. The notifications are single notification codes, which are selected from the Web Site window.

Microsoft Navision can send internal notifications:

- To notify a colleague that a new customer has been created in Microsoft Navision through your Web portal. The notification code in the **New-Customer Notif.** field is used.
- To notify a colleague that a new quote has been accepted in Microsoft Navision through your Web portal. The notification code in the **New-Quote Notif.** field is used.
- To notify a colleague that a response to a reverse auction has been created in Microsoft Navision through your Web portal. The notification code in the **Rev. Auct. Response Notif.** field is used.

External Notifications

External notifications relate to your Web portal user. The notification codes are grouped in notification processes and can be selected from the Notification Process Code window.

The notification processes can be defined on the Contact card, the vendor or Customer card, or on the Web Site card.

If a notification process is specified on the Contact card of a Web portal user, then the user will be notified according to this. If you leave the **Notification Process Code** field on the Contact card blank, the user will be notified according to the **Notification Process Code** on the Vendor or Customer card. If you also leave the **Notification Process Code** fields on these cards blank, the user will be notified according to the **Notif. Process Code** field on the Web Site card.

Sales and Notifications

Microsoft Navision can send the following external notifications connected to sales:

- A notification to notify a Web portal user that you have received their order from your Web portal. At this point, the user's order is actually a quote in Microsoft Navision with the status Accepted by Customer. The notification code in the **Quote-Received Notif**. field is used.

- A notification to confirm an order. This message is sent to your Web portal user when you make the quote into an order. The notification code in the **Quote-Confirmed Notif.** field is used.

- A notification to notify a customer that you have rejected their quote. The notification code in the **Quote-Rejected Notif.** field is used.

- A notification to notify a customer that you have shipped their order. The notification code in the **Order-Shipped Notif.** field is used.

The following diagram shows the stages of a sales quote's life cycle and the notifications associated with each stage:
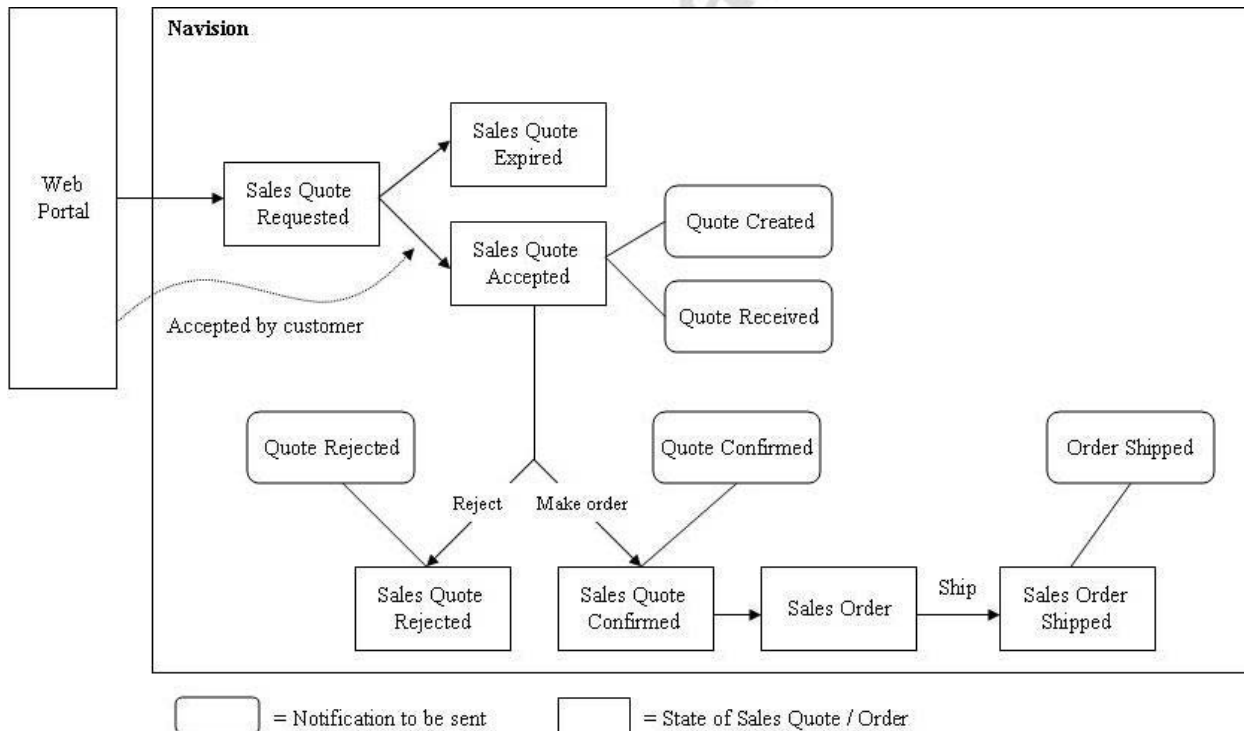
A notification process can be assigned to all your Web portal users. For more information see the section called "Assigning a Notification Process to a Customer" in Chapter 4, "Setting up Items and Customers"; and the section called "Assigning a Notification Process to a Vendor" in Chapter 5, "Working with Reverse Auction."

Reverse Auctions and Notifications

Associated with reverse auctions, Microsoft Navision can send the following external notifications:

- To invite a vendor to participate in a reverse auction. The notification code in the **Rev. Auct. Notif.** field is used.

- To notify a vendor that you have received their offer from your Web portal. The notification code in the **Rev. Auct. Update Notif.** field is used.

- To notify a vendor that you have received their decline of the invitation to participate in the reverse auction. The notification code in the **Rev. Auct. Decline Notif.** field is used.

- To notify a vendor that you have accepted their offer. The notification code in the **Rev. Auct. Won Notif.** field is used.

- To notify a vendor that you have rejected their offer. The notification code in the **Rev. Auct. Lost Notif.** field is used.

Passwords and Notifications

Microsoft Navision can send an external notification to notify a Web portal user that you have created a password for them or a new user ID. The notification code in the **Password-Created Notif.** field is used.

Notification Symbols

You can have the program automatically insert text from Microsoft Navision in the notification text. Do this by using specific symbols that the program replaces with values when you send the e-mail; for example, %08, %10, and so on, as shown in the screen shot below.
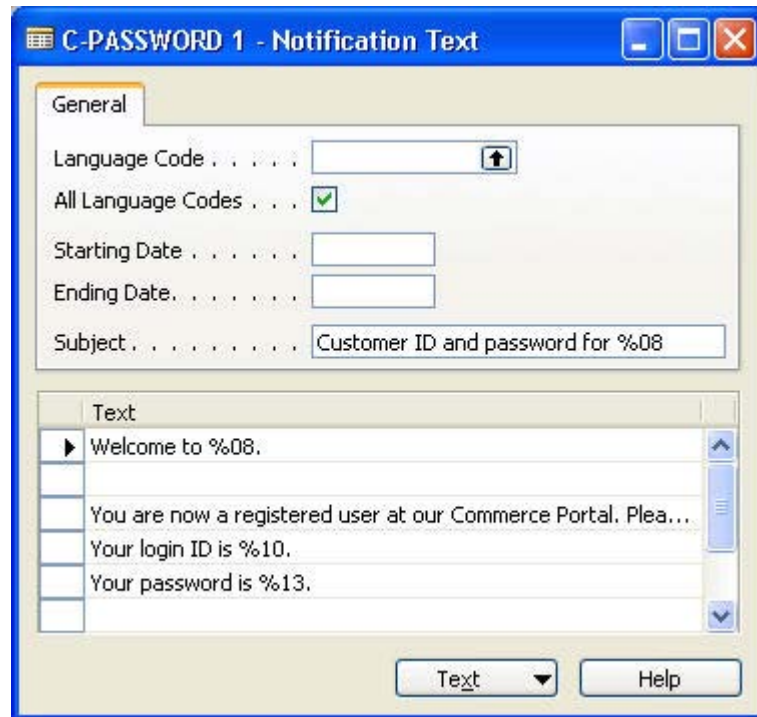
Exercises

In the following exercises, you create a new notification code and set up an alternative text for that notification code.

Creating New Notification Codes

1. On the Administration menu, click APPLICATION SETUP→COMMERCE PORTAL→NOTIFICATION CODES. The Notification Codes window appears.

2. On the Edit menu, **Insert New** (or press F3) to insert a new notification code.

3. For this example, in the **Code** field enter Training and in the **Description** field, enter CP Training.

4. Choose the notification code you have just created. Click NOTIFICATION→TEXTS. The Notification Text window appears.

5. In the **Language Code** field, enter ENU.

6. In the **Subject** field, enter the subject of the notification text and then fill in the text lines. For this example, enter Commerce Portal Exercise.

7. In the **Text** section, enter the following:

Line	Text
1	Hello!
2	<blank>
3	This notification code is a part of a solution to an exercise
4	in the Commerce Portal Training Material.

Creating Alternative Texts

1. Click in the header of the Notification Text window and press F3 to insert a new notification text card.

2. In the **Language Code** field, click the **AssistButton**, and then select a language code from the Languages window. Click **OK**.

3. In the **Subject** field, enter your alternative subject and then fill in the text lines for the body of your e-mail message.

4. In the header of the Notification Text window, select any of the fields, for example, the **Starting Date** field. Press F3 to insert a second notification text card.

5. In the **Starting Date** and **Ending Date** fields, enter dates.

6. In the **Subject** field, enter your alternative subject line text and then fill in some text lines for the body of your second e-mail message.

7. Click TEXT→LIST (or press F5) to verify that all notification texts have been created. The Notification Text List window appears.

Notification Processes

Once you have created your notification codes, you can group them together in notification processes. You can then assign a notification process to one or maybe a group of your Web portal users. To read more about this, see the section called "Assigning a Notification Process to a Customer" in Chapter 4, "Setting up Items and Customers."

Creating Notification Processes

To set up a notification process, follow this procedure:

1. On the Administration menu, click APPLICATION SETUP→COMMERCE PORTAL→NOTIFICATION PROCESSES. The Notification Processes window appears.

2. On the Edit menu, **Insert New** (or press F3) to insert a new notification processes card.

3. For this example, in the **Code** field, enter New NP and in the **Description** field, enter New Notification Process.

4. Leave the **Salutation** field set to Formal.

5. Complete the remaining fields using the following information:

Tab	Field	Value
Sales		
	New Consumer Notif.	NEW-CONS
	Quote-Received Notif.	S-RECEIVE
	Quote-Confirmed Notif.	S-CONFIRM
	Quote-Rejected Notif.	S-REJECT
	Order-Shipped Notif.	S-SHIP
Contact		
	Password-Created Notif.	C-PASSWORD
Revc. Auct.		
	Rev. Auct. Update Notif.	RA-UPD
	Rev. Auct. Decline Notif.	RA-DECL
	Rev. Auct. Won Notif.	RA-WON
	Rev. Auct. Lost Notif.	RA-LOST
	Rev. Auct. Invitation Notif.	RA-NEW

Setting up Web Templates

A Web Template in Commerce Portal is similar to a template in a word processing application. It is a document that contains formatting and sometimes generic text or other content, however, most of the content remains to be filled in on the individual Web page. To read more about Web pages, see Chapter 3, "Setting up Web Pages."

A website can contain any number of Web Templates. The following diagram shows how Web Templates make up a website:
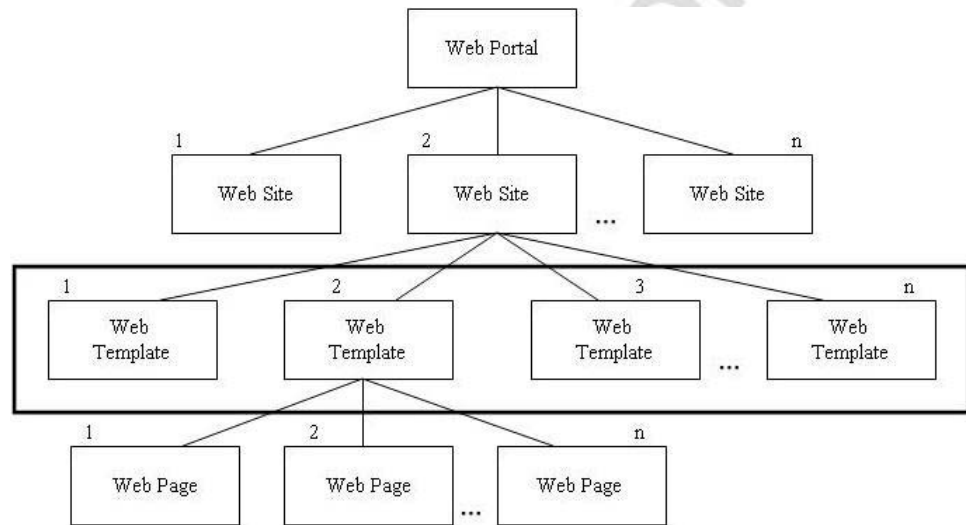
A Web Template can be used as a pattern for creating many Web pages. Each Web Template is based on an ASP page located on the Web server. The properties you choose to edit in Microsoft Navision appear on the Web Template. The fixed properties of a template can only be edited directly on the ASP page or the cascading style sheet. By using Web Templates, you can create new Web pages without having to do additional programming.

You can fill in the value of each property you chose to edit with information from Microsoft Navision, and you can maintain your website from within Commerce Portal. For example, the values of these properties could be a hyperlink to another Web page for a link property, a picture for a picture property, or text for a text property.

Web Templates

The Web Templates window gives you an overview of the templates you have defined for a website.

To view the templates, on the Administration menu, click APPLICATION SETUP→COMMERCE PORTAL→WEB TEMPLATES. The Web Templates window appears.
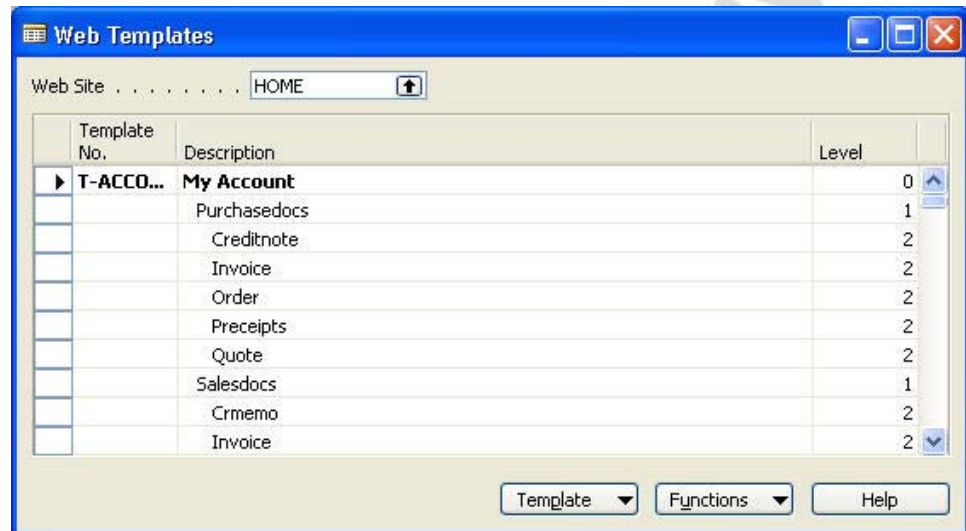
Each template is identified by a number in the **Template No.** field and a brief description in the **Description** field. The Web Templates can have a number of subproperties. The properties and subproperties form a hierarchy within the Web Template. This hierarchy can be seen in the Web Templates window. The lines written in bold text are root property collections. The indented lines, which are written in standard text beneath a root property collection, are its subproperties.

Each of your websites has a separate set of Web Templates. To see a list of websites, in the **Web Site** field, click the **AssistButton**. The Web Site List window appears.

Click **OK** to close the window.

Template Properties

To see the template properties, click TEMPLATE→PROPERTIES. The Properties Template window appears:
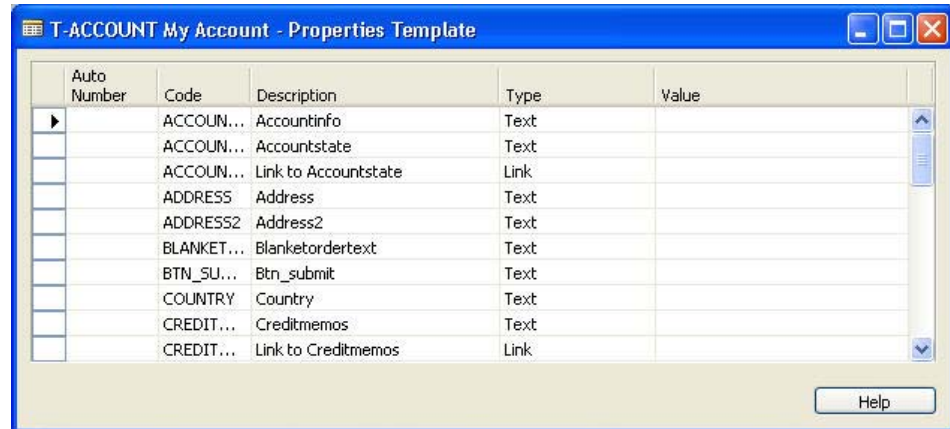
When you create a template, a number of template property lines will be created automatically. Each line corresponds to a property defined in the ASP file.

Automatic Numbering

Sometimes, when you make a Web Template, you cannot foresee how many properties (for example, lines of text) each Web page that is based on that particular template will need. An automatic numbering property appears once on a template, but you can duplicate it as many times as you want on the Web page. You can then enter a different value for each of the duplicated properties.

For example, a single text property only represents one line of text (250 characters). To define a paragraph with a flexible number of lines, it is necessary to use a text property with automatic numbering.

In the Properties Template window, the program fills in the **Code** field with the name of the property in the ASP file. You cannot change the name of a property. The program also fills in the **Description** field, but you can change this.

Template Property Types and Values

Every property has a type and a value. In the Properties Template window, the contents of the **Type** field defines what kind of data the property can contain, for example, text or a number. The **Value** field contains the data itself, that is, the actual text or number.

If you fill in the **Value** field on a template property line, the program enters it as the default value on all Web pages you create with the template. However, you can edit the value on each individual Web page.

The following table describes the seven property types:

Type	Value
Text	The **Value** field can contain text that will appear on the Web page. It can contain up to 250 characters.
Date	The **Value** field can contain a date that will appear on the Web page.
Time	The **Value** field can contain a time that will appear on the Web page.
Number	The **Value** field can contain a number that will appear on the Web page.
Picture	The **Value** field can contain the identification code of a picture. The code represents a link to a picture in the **Picture List** window. The picture will appear on the Web page.
Link	The **Value** field can contain the identification number of another page on the website. The link to the page referred to in this field will appear on the Web page.
Subproperties	The property has subproperties. That is, the property line represents an entire property collection. The contents of the **Value** field indicates whether or not the property's subproperties have been assigned a value. If the **Value** field contains Yes, the **Value** field on the subproperties has been filled in. If the **Value** field contains No, the **Value** field on the subproperties is blank.

You cannot add a new template property line. If the ASP file has been updated with new properties, you have to create the Web Template again, and the properties of the ASP file will be imported.

Creating Web Templates Requirements

You MUST have an ASP programmer set up ASP pages to determine the structure and layout of your website. When you have completed the setup of your Commerce Portal and your website, you are ready to create Web Templates by running the Create Web Template batch job.

Exercises

In these exercises, you create a new template in your website. You will be using an existing ASP file to base the template on, so you actually create a copy of one of the other templates.

NOTE: Before starting this exercise, you must have an ASP programmer create the ASP file addresses.asp. This file defines the names and types of the properties that will be imported into Navision and is used in step 5 of the exercise.

Creating Web Templates

1. On the Administration menu, click APPLICATION SETUP→COMMERCE PORTAL→WEB TEMPLATES. The Web Templates window appears.

2. Click FUNCTIONS→CREATE WEB TEMPLATE. The Create Web Template batch job request window appears.

3. In the **Template No.** field, enter a unique template number, for example, T-EXERCISE.

4. In the **Description** field, enter a brief description, for example, Training Material Exercise.

5. In the **ASP File Name** field, enter addresses.asp. This is the file name of the ASP file you want to base your template on.

6. Click **OK** to start the batch job.

Verifying that the New Template has been Created

1. To verify that the template was successfully created, in the Web Templates window, find and select the T-EXERCISE template.

2. To view the properties of the template, click TEMPLATE→PROPERTIES. The Properties Template window appears.

You can also view the properties in the addresses.asp file that you entered in step 5. The PAGEPROPERTIES section at the bottom of the ASP file defines the names and types of the properties that will be imported into Microsoft Navision. If the name of the property is followed by .#, it means that the property will have subproperties.

In the case of the addresses.asp file, four properties will be imported, three of the type Text and one of the type Link. It should appear as follows:

```
<--PAGEPROPERTIES
ORDERLIST.TEXT
SHIPTOLIST.TEXT
NEWADDRESS.TEXT
LINK.LINK
PAGEPROPERTIES-->
```

When the name is followed by .#, the Description properties can consist of multiple lines of text, like for example, in reorder.asp file and the order.asp file.

Test Your Knowledge – **Setting up Microsoft Navision Commerce Portal**

1. What are the two types of Notifications?

2. What does setting up Commerce Portal include?

3. What do you need in order to create new Web Templates?

4. Before using Commerce Portal, what will you need to enter and set up?

5. When setting up your website, what information must the website card contain?

6. Briefly explain Web Templates.

7. What are the four areas that the Commerce Portal framework is built upon?

8. What are the seven property types found on the Properties Template?

9. What is the Navision Application Server used for with Commerce Portal?

10. Define Permissions and Web portal Roles.

Quick Interaction: Lessons Learned

Take a moment to write down three Key Points you have learned from this chapter:

1.

_____

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2.

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CHAPTER 3: SETTING UP WEB PAGES

- Overview
- Creating Web Pages
- Testing Hyperlinks
- Adding Pictures to your Web Portal

Overview

This chapter describes how to set up Web pages in Microsoft® Business Solutions−Navision® Commerce Portal and how to verify that all links are valid. This chapter also describes how to add pictures to your Web pages.

Creating Web Pages

Once you have set up Web Templates for use in each of your websites, you are ready to create the actual Web page. Each of your Web pages is based on a Web Template. This also means that you can create a number of Web pages based on the same Web Template. These Web pages will make up your Web portal.

The following diagram illustrates the relationship between the different elements of the Web portal.
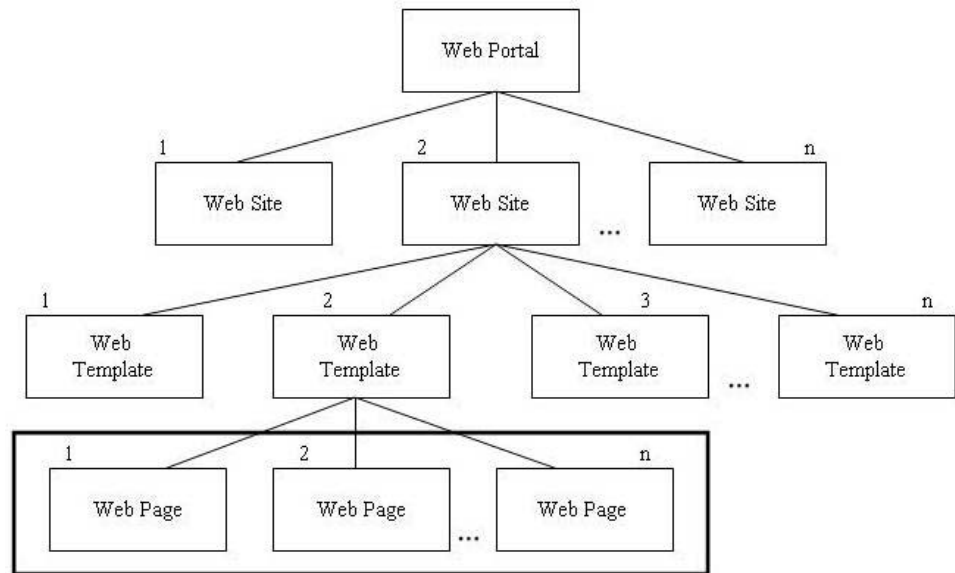
Web Pages

Each of your websites has its own set of Web pages and Web Templates. Each Web page has a set of properties defined by the Web Template. Therefore, you cannot add additional properties to a Web page.

When you create a Web page, a number of property lines will be created. Each line corresponds to a property line defined in the Web Template on which your Web page is based.

After the Web page has been created, you need to fill in or adjust the values of the properties. Note that when you create the Web page, the property lines are simply copied from the Web Template that you base your Web page on. You can create any number of Web pages based on one Web Template; therefore, you might want to customize the values of the properties on each Web page.

Exercise – **Creating New Web Pages**

In these exercises, you create a new Web page on your website. You will be using an existing Web Template, so you will create a new Web page that is similar to one of your other Web pages. You will then fill in additional information to specify the Web page properties to complete the Web page.

1. On the Administration menu, click APPLICATION SETUP→COMMERCE PORTAL→WEB SITE→WEB PAGES. The Web Pages window appears:
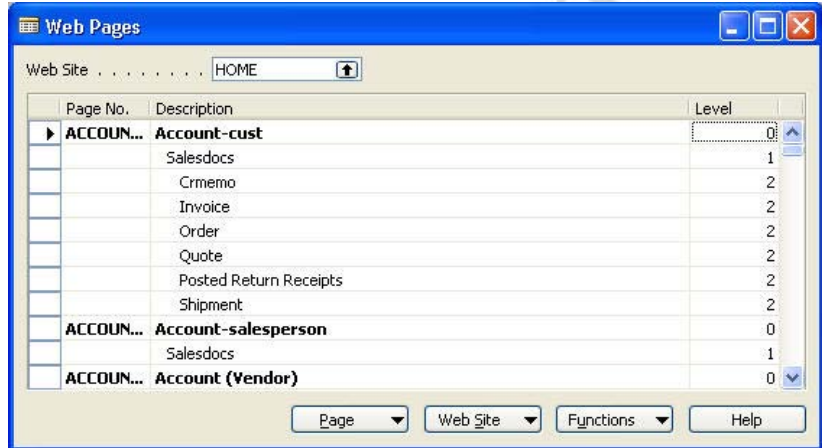
2. Click FUNCTIONS→CREATE WEB PAGE. The Create Web Page batch job request window will appear.

3. In the **Page No.** field, enter a unique Web page number, for example, EXERCISE.

4. In the **Description** field, enter a short description, for example, Training Course Exercise.

5. In the **Template No.** field, click the **AssistButton** to view a list of Web Templates. The Web Template List window appears.

6. In the **Description** field, find Sales Invoices. This will be the Web Template to base your new Web page on. Click **OK**.

7. Click **OK**.

Exercise – **Completing Web Pages**

The new page now appears in the Web Pages window.

1. Click the Web page you have just created.

2. To see the properties of the Web page, click PAGE→PROPERTIES. The Properties Page window appears:
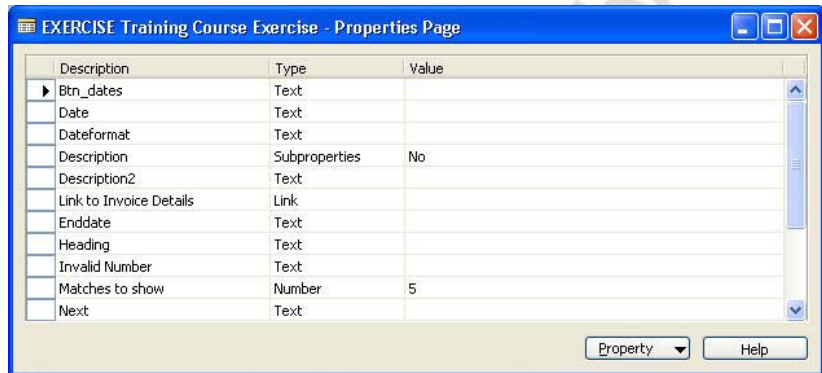
The property lines from the template have been copied to the Web page. You can edit the contents of the **Value** field on each property line. One of the Web page property lines has subproperties and there is a No in the **Value** field. This means that you have to enter the values for the subproperties in order to complete the Web page.

3. On the line with subproperties, click the **Value** field and then click the **AssistButton** in the field. A new property collection appears in the Properties Page window.

4. In the **Value** field of the first line enter Training Course Exercise. You can use as many lines as you need to enter your text. Close the window.

   The subproperties that contained No in the **Value** field now have Yes in the **Value** field. This means that you have assigned the property's subproperties a value.

5. In the Properties Page window, directly in the **Value** field, fill in the other values of the properties using the following information:

Description	Type	Value
Btn_dates	Text	Search
Date	Text	Document Date
Dateformat	Text	(dd/mm/yyyy)
Description2	Text	Please select an invoice from the following list...

Description	Type	Value
Link to Invoice Details	Link	INVOICEDETAIL
Enddate	Text	End Date:
Heading	Text	Sales Invoice Information
Invalid Number	Text	Not a valid number.
Matches to show	Number	5
Next	Text	Next %1
No	Text	Document No.
No Invoices	Text	You currently have no sales invoices registered on the system.
Noofrecs	Text	No of records per page
Previous	Text	Previous %1
Results	Text	result(s) found.
Startdate	Text	Start Date

Once you have filled in values for the properties on the page, the page is complete.

Exercise – Scenario

You have decided to start running a news page on your Web portal in order to keep your customers informed about the latest news and events in your company. In these exercises, you create a new Web page where you can publish your company's news and events. You then add a menu item to the top menu to allow your customers to open your new page.

Adding New Lines to Web Templates

1. On the Administration menu, click APPLICATION SETUP→COMMERCE PORTAL→WEB TEMPLATES. The Web Templates window appears.

2. Select the template number T-GLOBALTEXTPAGES, and then click TEMPLATE→PROPERTIES. The Properties Template window appears:
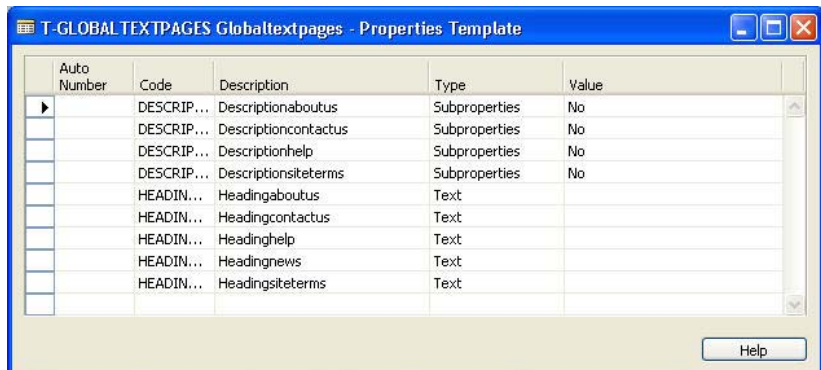
3. Click F3 to add a line for the description.

4. In the **Code** field, enter a code for the template line, for example, descriptionnews.

5. In the **Type** field, enter Subproperties.

6. In the **Value** field, click the **AssistButton**. The Properties Template window for Descriptionnews appears.

7. Select the **Auto Number** option.

8. In the **Code** field, enter #.

9. In the **Description** field, enter a short description, for example, Textline.

10. Escape back to the Globaltextpages Properties Template window.

11. Press F3 to add another new line, this time for the heading.

12. In the **Code** field, enter a code for the template line, for example, headingnews. In the **Type** field enter Text.

13. Close the Globaltextpages Properties Template window.

Adding Extra Lines to Web Pages

1. On the Administration menu, click APPLICATION SETUP→COMMERCE PORTAL→WEB SITE→WEB PAGES. The Web Pages window appears.

2. Locate the GLOBALTEXTPAGES Web Page and click PAGES→PROPERTIES.

3. Click the line you created for the description, in this case Descriptionnews.

4. In the **Value** field, click the **AssistButton**. The Properties Page window appears.

5. Enter the following text, noting that there will be three separate lines of text:

Description	Type	Value
Textline	Text	<H3>News&Events </H3>
Textline	Text	CRONUS International Ltd. Commerce Portal is operational.
Textline	Text	We are pleased to welcome new as well as existing customers.

NOTE: Any valid HTML tag can be used to format text that will be displayed on a Web page on your storefront. The <P> tag in the Value field of the first Web page property line is an HTML tag that sets a line break.

Adding Menu Items on Your Web Portal Home Page

You are now ready to add a menu item to the menu on your Web portal.

1. On the Administration menu, click APPLICATION SETUP→COMMERCE PORTAL→WEB SITE→WEB PAGES. The Web Pages window appears.

2. In the **Page No.** field, find GLOBALMENU. Select the property with the description Menu.

3. Click PAGE→PROPERTIES. The Properties Page window appears.

4. Click F3 to add a new line.

5. In the **Description** field, enter News.

6. In the **Value** field, click the **AssistButton**. The Properties Page window appears.

7. On the first line, for Link, in the **Value** field, click the **AssistButton**. The Web Page List window appears.

8. In the **Page No.** field, locate the GLOBALTEXTPAGES. This is the Web page your customer will see when they click the link.

9. In the **Value** field of the second property line (Text), enter 'News and Events.' This will be the name of the link on your Web portal. Press ENTER.

10. Close all open windows.

Reloading Web Pages

After you have added the new lines to the Web pages, you must reload the Web pages to the SQL Server.

1. On the Administration menu, click APPLICATION SETUP→COMMERCE PORTAL→WEB SITES. The Web Site Card window appears.

2. Click FUNCTIONS→RELOAD PAGE PROPERTIES. The program will now reload all changes made to the page properties.

Adding Extra Lines to Web Pages

For the changes you have made to take affect on your Web portal, you must edit the ASP page GlobalTextPages. The ASP page can be located in the folder indicated in the **ASP File Folder** field on the Web Site Card window.

In the GlobalTextPages ASP page there are two Select Case statements. You must enter one new Case statement for the header and one for the content. The value in the Case statement must match the value you entered in the GLOBALMENU Web Page in Commerce Portal (in this case, NEWS AND EVENTS).

You must also enter the name of the properties in the page properties list in the ASP file (HEADINGNEWS and DESCRIPTIONNEWS). The screen below highlights the necessary changes:

```
%>
<link rel="stylesheet" type="text/css" href="CommercePortal.css">
<html>
<body class="mainframe">
<table width="100%">
<tr>
        <td align="middle" valign="middle"><h3>
        <%
        Select Case cPage
        Case "ABOUTUS"
                Response.write properties.HEADINGABOUTUS
        Case "CONTACTUS"
                Response.write properties.HEADINGCONTACTUS
        Case "SITETERMS"
                Response.write properties.HEADINGSITETERMS
        Case "HELP"
                Response.write properties.HEADINGHELP
        Case "NEWSANDEVENTS"
                Response.write properties.HEADINGNEWS
        End Select

        %>
                </h3>
        </td>
</tr>
<tr>

        <td><%
        Select Case cPage
                Case "ABOUTUS"
                        Response.write BuildString(properties.DESCRIPTIONABOUTUS)
                Case "CONTACTUS"
                        Response.write BuildString(properties.DESCRIPTIONCONTACTUS)
                Case "SITETERMS"
                        Response.write BuildString(properties.DESCRIPTIONSITETERMS)
                Case "HELP"
                        Response.write BuildString(properties.DESCRIPTIONHELP)
                Case "NEWSANDEVENTS"
                        Response.write BuildString(properties.DESCRIPTIONNEWS)
                End Select
        %></td>
</tr>
</table>
</body>
</html>

<!--PAGEPROPERTIES
HEADINGNEWS, TEXT
DESCRIPTIONNEWS.#, TEXT
HEADINGABOUTUS, TEXT
DESCRIPTIONABOUTUS.#, TEXT
HEADINGSITETERMS, TEXT
DESCRIPTIONSITETERMS.#, TEXT
```

To verify that the new page has been added to your Web portal and that the Web pages refer to each other correctly, open your Web portal and browse to the Web page.

Testing Hyperlinks
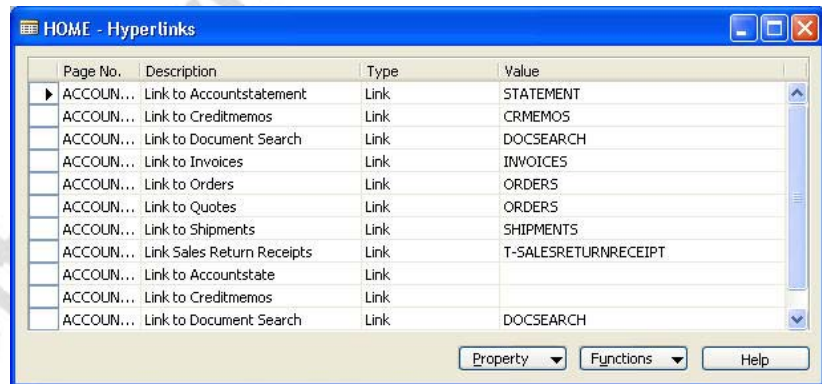
When you have finished creating all of your Web pages for your website, there will be a structure among the Web pages. The Web pages will refer to each other, using hyperlinks. The pictures on your Web pages are also referred to through links.

There are two types of hyperlinks in Commerce Portal:

- A link from one Web page to another.

- A link to a picture.

Before you allow customers into your Web portal, you can test that all hyperlinks refer to a Web page or a picture; that is, that the hyperlink is not broken.

1. On the Administration menu, click APPLICATION SETUP→COMMERCE PORTAL→WEB SITE→WEB PAGES. The Web Pages window appears.

2. In the **Site** field, click the **AssistButton** to select a website from the Web Site List window, and then click **OK**.

3. Click WEB SITE→HYPERLINKS. The Hyperlinks window appears:

4. The Hyperlinks window displays all of the properties for the website that have the type Link or Picture.

5. The **Page No.** field contains the number of the Web page, and the **Description** field contains the description from the Web page property line.

6. The **Type** field contains the type of the hyperlink: a link or picture. The **Value** field contains the actual link.

7. Click the hyperlinks you want to test.

HINT: To select hyperlinks that are not sequential, press CTRL and then click each line.

---

8. To start testing the selected hyperlinks, click FUNCTIONS→CHECK HYPERLINKS. A dialog box appears asking if you want to check selected hyperlinks. Click **Yes**.

   When the program has completed the test, a window appears that tells you how many hyperlinks were tested and how many broken hyperlinks were found.

9. Click **OK**.

10. On the **View** menu, click **Marked Only** to view the broken hyperlinks that were found during the test.

Exercise – Scenario

In these exercises you test all hyperlinks on a website. You then delete one of the links and run the test again, and finally you reestablish the link.

Testing all Hyperlinks

1. On the Administration menu, click APPLICATION SETUP→COMMERCE PORTAL→WEB SITE→WEB PAGES. The Web Pages window appears.

2. In the **Site** field, click the **AssistButton** to select a website from the Web Site List window, and then click **OK**.

3. Click WEB SITE→HYPERLINKS. The Hyperlinks window appears.

4. On the **Edit** menu, click **Select All** (or press CTRL+A) to select all hyperlinks.

5. To start testing the selected hyperlinks, click FUNCTIONS→CHECK HYPERLINKS. A dialog box appears asking if you want to check selected hyperlinks. Click **Yes**.

   When the program has completed the test, a window appears that tells you how many hyperlinks were tested and how many broken hyperlinks were found.

6. Click **OK**.

Changing Hyperlinks

1. On the Administration menu, click APPLICATION SETUP→COMMERCE PORTAL→WEB SITE→WEB PAGES. The Web Pages window appears.

2. In the **Page No.** field, find DEFAULT.

3.   Click PAGE→PROPERTIES. The Properties Page window appears.

4.   On the property line for Local Menu, in the **Value** field, click the **AssistButton**. The Web Page List window appears.

5.   In the **Page No.** field, find the EXERCISE web page you created earlier and click **OK**.

     The Local Menu property now has a hyperlink to the EXERCISE web page.

6.   Escape back to the Web Pages window.

Deleting and Testing Hyperlinks

1.   Verify that your line indicator is on the DEFAULT Web page.

2.   Press F4 to delete the DEFAULT Web page. A message appears asking if you want to delete the Page Property Collection. Click **Yes**.

     Test the hyperlinks again.

3.   On the Web Pages window, click WEB SITE→HYPERLINKS. The Hyperlinks window appears.

4.   On the **Edit** menu, click **Select All** (or press CTRL+A) to select all hyperlinks defined on your website.

5.   Click FUNCTIONS→CHECK HYPERLINKS. A dialog box appears asking if you want to check selected hyperlinks. Click **Yes**.

6.   When the program has completed the test, a window appears indicating how many hyperlinks were tested and how many broken hyperlinks were found.

7.   Click **OK**.

8.   To view the broken hyperlinks, on the **View** menu, click **Marked Only**.

9.   Do not close the Hyperlinks window.

Reestablishing Hyperlinks

1.   In the **Value** field of the hyperlink, click the **AssistButton**. The Web Page List window appears.

2.   In the **Page No.** field, locate the LOCALMENU Web page.

3.   Click **OK**.

4.   Now you are ready to test the hyperlinks again.

5.   Click FUNCTIONS→CHECK HYPERLINKS. A dialog box appears asking if you want to check selected hyperlinks. Click **Yes**.

6. When the program has completed the test, a message should appear indicating how many hyperlinks were tested and that none were found broken.

   The broken hyperlink has been reestablished.

7. Click **OK** to finish.

Adding Pictures to Your Web Portal

You may want to include pictures on your Web portal. If you have digitized pictures that you would like to use, you can import them into Commerce Portal. For example, if you have pictures of your items, or if you have menu graphics like buttons, bars, or other decorative graphics, you can import them into Commerce Portal.

You can import the pictures you want to include on your Web portal to the Picture Card. Pictures are then synchronized to the Web Server automatically. The format of the picture files must be either JPEG or GIF. If you have pictures inserted on your Item card that you want to use on your Web portal, you can save the pictures in either GIF or JPEG format and import it to the Picture card.

Handling Pictures

You can import, export, and remove pictures in the same way as you would handle pictures of your employees or items in Microsoft Navision.

The Picture Card is accessed on the Administration menu, by clicking APPLICATION SETUP→COMMERCE PORTAL→WEB SITE→PICTURES. The Picture Card window appears:
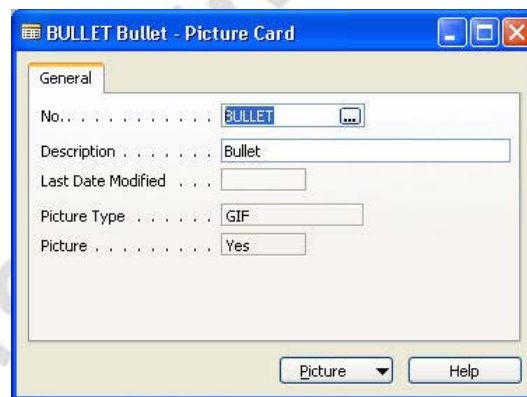
To see a list of pictures, on the Picture Card window, click PICTURE→LIST. The Picture List window appears.

To import a picture, click PICTURE→IMPORT. A dialog box appears in which you select the file name to import.

To remove a picture, click PICTURE→REMOVE. A dialog box appears in which you confirm the removal of the picture.

To view a picture, click PICTURE→VIEW. The picture is shown in an external viewer.

Exercise – Scenario

In this exercise you Import a new picture for use on your Web portal.

TIP: If you do not already have a picture, you can export one of the other pictures in Commerce Portal to use for this scenario.

Creating Pictures

1. On the Administration menu, click APPLICATION SETUP→COMMERCE PORTAL→WEB SITE→PICTURES. The Picture Card window appears.

2. On the Edit menu, click **Insert New** (or press F3) to create a new picture.

3. Press ENTER to have the program fill in the **No.** field automatically. Alternatively, you can enter a unique value manually.

4. In the **Description** field, enter a short description, for example, Training Course Exercise.

5. Click PICTURE→IMPORT. A dialog box appears in which you can select a picture by its file name.

6. Locate the file and click **Select Image**.

7. To view the picture, click PICTURE→VIEW. The picture is shown in an external viewer.

8. Escape back to the **Picture Card**.

   The **Last Date Modified** field shows the date of the last modification on each picture card. The program maintains the field, and you cannot change the date manually.

The picture is now imported. You can display the picture on your Web portal. You can include the picture on a Web page that has a property with the type Picture by entering the picture number in the **Value** field on the property line.

Test Your Knowledge − Setting up Web Pages

True   False

❑   ❑   1.   After a Web page has been created, you need to fill in or adjust the values of the properties.

❑   ❑   2.   There are three types of hyperlinks in Commerce Portal.

❑   ❑   3.   Pictures can be imported into Commerce Portal if they are either GIF or JPEG format.

❑   ❑   4.   You can create multiple Web Pages based on the same Web Template.

❑   ❑   5.   The **Type** field of the Hyperlink contains the actual link.

❑   ❑   6.   Each of your Web Pages is based on a Web Template.

❑   ❑   7.   Web Pages refer to each other using Page References.

❑   ❑   8.   Each Web Page has a set of properties defined by the Web Template. Therefore, you can add additional properties to a Web page.

Quick Interaction: Lessons Learned

Take a moment to write down three Key Points you have learned from this chapter:

1.

2.

3.

CHAPTER 4: SETTING UP ITEMS AND CUSTOMERS

- Overview
- Grouping Items on Your Web portal
- Customers and Commerce Portal

Overview

This chapter describes the final steps you must take before you can welcome users onto your Web portal.

Grouping Items on Your Web portal

Your Web portal contains an electronic product catalog to display the items that you plan to sell. When you design your catalog, you may want to display your items in groups. You can group your items in many different ways. For example, items can be grouped by item type or by association, such as paint and brushes.

Your inventory might already be grouped. For example, you may use different number series for different groups of items.

To group your items on your Web portal you must use the **Class** field on the item card.

Commerce Server Catalog

The catalogs that display your items on the Web portal are created and maintained in Microsoft Commerce Server Catalog Management.

For example, in the demonstration Web portal the items are classified by furniture type. They are grouped as chairs, desks, whiteboards, and so on. Chairs have been further divided into guest chairs and swivel chairs.

You can read more about Catalogs in the Microsoft documentation of Commerce Server.

Exercise – Scenario

You have decided to start selling spare parts for the furniture on your storefront. In these exercises, you create a new class called Spare Parts. You then group the relevant items using this new class. In order to allow your customers to buy spare parts from your storefront, you must create the necessary category.

Creating New Classes

1. On the Warehouse menu, click PLANNING & EXECUTION→SETUP INVENTORY→CLASSES. The Classes window appears.

2. On the **Edit** menu, click **Insert New** (or press F3), to create a new class.

3. In the **Code** field, enter Spare Part.

4. In the **Description** field, enter Spare Parts.

5. Close the **Classes** window.

Assigning Items to a Class

1. On the Warehouse menu, click PLANNING & EXECUTION→ITEMS. The Item Card window appears.

2. In the **No.** field, find 70000.

3. Click the **E-Commerce** tab.

4. In the **Class** field, click the **AssistButton**, click the line for SPARE PART and click **OK**. Alternatively, you can enter Spare in the **Class** field and press ENTER.

5. Press PAGE DOWN and repeat steps 4-5 for Items 70001−70060.

Adding a New Class to the Catalog

Classes are added to the Catalogs on the Microsoft Commerce Server in the Business Desk.

1. On your desktop, click the **Commerce Portal Business Desk** button.

   If an icon does not exist or the Business Desk does not open, in the browser you need to enter the computer name where Commerce Portal is installed and "CommercePortalbizdesk." It should look like this: computername/CommercePortalbizdesk.

   You may be asked to enter a User Name and Password.

2. Under the Business Desk Home pane, click CATALOGS→CATALOG EDITOR. The Catalogs pane appears.

3. Click **Cronus Catalog**. On the menu bar, click **Open Catalog**. The Catalog Content window appears.

3. Click NEW→NAVISION ITEM. Click **OK** to enter your new class as a category. The Catalog Editor window appears.

4. Under **Category Properties**, in the **Name**, **Display name**, and **Description** fields, enter Spare Parts.

5. In the **Searchable** field, select the option to include the category in your index.

Synchronizing to Your Web portal

To synchronize your Item table to the SQL Server database, follow this procedure:

1. On the Administration menu, click APPLICATION SETUP→COMMERCE PORTAL→PERIODIC ACTIVITIES→SYNCHRONIZATION. The Synchronized Tables List window appears.

2. Click the line containing Item, table 27.

3. Click FUNCTIONS→FORCE SYNCHRONIZATION. A dialog box appears asking if you want to force synchronization of the Item table. Click **Yes**.

4. Open the Catalog Content window in the Microsoft Commerce Server:

On the Microsoft Commerce Server, open the Business Desk. Click CATALOGS→CATALOG EDITOR. Click **Cronus Catalog**. On the menu bar, click **Open Catalog**. The Catalog Content window appears.

5. Expand the Categories section and under Categories, click **Spare Parts.**

In the Products in category: Spare Part section, the list of items (70000-70060) now appears.

To verify that the menu item has been added to your Web portal, open your Web portal and browse the Web pages. If your Web portal is already open, just refresh the Web page.

Customers and Commerce Portal

Both new and existing Web portal users can place orders on your Web portal.

If you want your existing customers to use the same account on your Web portal as in Navision – using the same information such as addresses, payment terms, and so on – you have to enable them to use Commerce Portal. New users can sign up on your Web portal.

To enable customers to shop on your Web portal, you must complete the following tasks:

- Assign person contacts to customers (company contact).
- Assign roles to customers (person contacts).
- Assign notification process codes to customers (person contacts).
- Assign Commerce Portal user IDs and passwords to customers (person contacts).
- Assign priorities to your customers (person contacts).

The following sections describe these tasks in more detail.

Assigning Contact Cards to Customers

All information about Web portal users is maintained on related Contact cards. If a customer is already registered in your database, you can manually grant them the necessary permissions and create a Commerce Portal login ID and password for them by creating a Contact Person card. If a new Web portal user signs up in your Web portal, Navision automatically creates a new Customer card, a Contact Company card, and Contact Person card.

Assigning a Role to Customers

Before you welcome your customers to your Web portal, you must define which tasks your customers are allowed to perform on your Web portal, and afterwards you must grant permissions to each customer by assigning a role according to this definition.

In Commerce Portal, you can define different roles. This means that several types of Web portal users can do business activities with your company or browse in your Web portal. Different roles have different permissions to perform different activities, such as business, maintenance, or administration activities.

You can choose to assign the same role to all your customers or you can define different roles and assign these to customers according to the permissions you want to grant them. The roles are assigned to the Contact Person card.

Assigning a Notification Process to a Customer

In Commerce Portal, you can notify your customers of the status of their orders. But instead of doing this manually by phone or fax, you can have Navision do this automatically by e-mail. This is done using notification processes.

External notifications relate to your Web portal user. The notification codes are grouped in notification processes and can be selected from the Notification Process List window.

The notification processes for a customer can be defined per contact on the Contact Person card, per customer on the Customer card, or per website on the Web Site card.

If a notification process is specified on the Contact card of the Web portal user, the user will be notified according to this. If you leave the **Notification Process Code** field on the Contact Person card blank, the user will be notified according to the notification process code on the Customer card. If you also leave the **Notification Process Code** field on the Customer card blank, the user will be notified according to the **Notification Process Code** field on the Web Site card.

The customer and the contacts related to the customer can receive e-mail notifications, for example, when the following events in Navision occur:

- When a sales quote is accepted.
- When a sales quote is confirmed, that is, made into a sales order.
- When a sales quote is rejected.
- When a sales order is shipped.
- When a Web portal user ID and password are created.

Assigning Web portal User IDs and Passwords to Customers

Customers need to sign in to your Web portal with their user ID and password in order to be correctly identified when they place an order and to ensure that they receive all discounts that they are entitled to.

New customers must register on your Web portal with a login ID and a password of their own choice. The customer then uses this Web portal user ID and password to sign in to your Web portal, where they are allowed to perform the tasks you have granted them permission for.

But some of your existing customers may also want to place orders through your Web portal. In order to use the information on the Customer card with existing customers, you have to create a Web portal user ID and password for them.

NOTE: The login ID must be unique. If you enter a login ID that already exists, a dialog box telling you this will appear.

When you create a Web portal user ID and password for a new Web portal user, Navision automatically generates the password and the user will receive an e-mail notification. The notification code in the **Password-Created Notif.** field, defined on the **Contact** tab of the notification process card for this customer, determines the content of the e-mail.

To read about notification processes, see the section called "Setting up Notification Processes" in Chapter 2, "Setting up Microsoft Navision Commerce Portal."

Deleting a Web portal User's Login ID

You can also disable your Web portal users, which means that the user will no longer be able to sign in to your Web portal. Do this by using the Remove from Web portal function. The program then deletes all the information that was used for the user to have access to the Web portal. This includes roles and notification process codes.

NOTE: It is not possible to delete a login ID if there are any sales documents containing the login ID that are not posted.

Assigning Queue Priorities to Your Customers

When you create a new Customer card, the program automatically assigns the value Medium Priority to the customer and the related contact persons. However, you can assign different priorities to your customers and contact persons. When many customers are browsing your Web portal, and there are a large number of Web portal requests that need to be processed, the requests from your customers with the highest priority will be processed first.

Exercises

In the following exercises, you create a new Contact Person card for a customer. You will also generate a new login, password, and assign roles to the contact to give your customer access to your Web portal.

Creating a New Contact Person

1. On the Sales & Marketing menu, click SALES→CONTACTS. The Contact window appears.

2. Press F3 and ENTER to create a new Contact card.

3. Complete the following fields with this information:

Tab	Field	Value
General		
	Type	Person
	Company No.	John Haddock Insurance Co.
	Name	Kendall Keil
Communication		
	E-mail	\<your email address> to view the email.
Commerce Portal		
	Login ID	kkeil
	Notification Process Code	Basic

4. Click CONTACT→COMMERCE PORTAL ROLES. The Web portal User Roles window appears.

5. In the **Web portal Role Code** field, click the **AssistButton** to view a list of the Web portal roles. The Web portal Roles window appears.

6. In the **Code** field, find PRTNR. Click on the line and click **OK**.

7. Commit the code to the field.

8. Escape back to the Contact Card window for Kendall Keil.

9. To create a password for this contact, click FUNCTIONS→COMMERCE PORTAL→CREATE PASSWORD. A dialog window asks if you want to create a new password and send to the user. Click **Yes**.

10. A dialog box appears telling you that an email message containing a new Password will be sent to the user. Click **OK**.

11. On the **Commerce Portal** tab, the **Password** option is now selected.

    While in the Contact header, if you Zoom (CTRL+F8) and find the **Password** field, you see that an encrypted password has been added to this Contact Card table.

12. Open the email to see your password.

Manually Sending Emails with Passwords

If you do not have access to Microsoft® Outlook® within the class, but you have
Outlook Express or Outlook installed and configured on your machine, you can
manually send the email.

1. On the Administration menu, click APPLICATION SETUP→COMMERCE
   PORTAL→PERIODIC ACTIVITIES→COMMERCE PORTAL STATUS. The
   Commerce Portal Status window appears.

2. Click the **Communication** tab.

3. In the **No. of Queued E-mail Msgs** field, click the **AssistButton**.

4. Locate your email address from the list.

5. Click FUNCTIONS→RESEND MANUALLY. A Microsoft Office Outlook
   security dialog box appears. Select the **Allow Access for** option and
   click **Yes**.

6. Outlook then opens with the email notification to be sent to you.

7. Make note of the Login and Password within the body of the email.

8. Close the email without clicking **Send**.

Logging On to Your Web portal

1. Open your Internet browser and enter the address of your Web
   portal, the website will appear in your browser.

2. Log on to your Web portal as the new contact person you have
   created in the previous exercise, using the password you received in
   the e-mail.

Test Your Knowledge – **Setting up Items and Customers**

1. In the Catalog Editor, you select the _____ option to include the category in your index.

2. You use the _____ field on the Item Card to group your items on your Web portal.

3. The function used to synchronize the Item table to SQL Server database is called _____.

4. The requests from your customers with the _____ _____ will be processed first.

5. Your Web portal contains a/an _____ _____ to sell the item that you plan to sell.

6. You can disable your Web portal users by using the _____ _____ function.

7. The _____ assists in letting your customers know the status of their orders automatically by e-mail.

8. The catalogs that display your items on the Web portal are created and maintained in _____ _____.

Quick Interaction: Lessons Learned

Take a moment to write down three Key Points you have learned from this chapter:

1.

   _____

   _____

   _____

   _____

2.

   _____

   _____

   _____

   _____

3.

   _____

   _____

   _____

   _____

CHAPTER 5: WORKING WITH REVERSE AUCTION

- Overview
- Vendors and Commerce Portal
- Reverse Auction

Overview

This chapter describes how you can ease your purchasing process by requesting offers on different items from your vendors through the Web portal.

Vendors and Commerce Portal

You can give your vendors access to some of your internal information, located in Microsoft® Business Solutions−Navision®, by giving them access to your Web portal.

If you want your vendors to use the same account on your Web portal as in Microsoft Navision − using the same information like addresses, payment terms, and so on − you just have to enable them to use Commerce Portal.

To enable vendors to access information and to respond to reverse auctions on your Web portal, you must complete the following tasks:

- Assign Contact Person cards to vendors (company contacts).
- Assign roles to vendors (person contacts).
- Assign notification process codes to vendors (person contacts).
- Assign Commerce Portal login ID and passwords to one or more contact persons related to the vendors (person contacts).
- Assign priorities to your vendors (person contacts).

The following sections describe these tasks in more detail.

Assigning a Contact Person Card to Vendors

All information about Web portal users is maintained on related Contact Person cards. If a vendor is already registered in your database, you can manually grant them the necessary permissions and create a Commerce Portal login ID and password for them by creating a Contact Person card.

Assigning a Role to a Vendor

Before you welcome your vendors to your Web portal, you must define which tasks each of your vendors is allowed to perform on your Web portal. Then you must assign one or more roles to your vendor according to these tasks. You can choose to assign the same role to all your vendors or you can define different roles and assign these to vendors according to the permissions you want to grant them. The roles are assigned to the Contact Person card.

Assigning a Notification Process to a Vendor

In Commerce Portal, you can notify your vendors of different events connected to your reverse auctions. But instead of doing this manually by telephone or fax, you can have Microsoft Navision do this automatically by e-mail. This is done using notification processes.

A notification process can be assigned to each of your vendors and/or the contact persons related to the vendor. If the **Notification Process Code** field on the Vendor card is filled in, the vendor will receive e-mail notifications, for example, when the following events in Microsoft Navision occur:

- When a reverse auction is created.
- When an auction is closed.
- When an offer is accepted.
- When an offer is rejected.
- When a Web portal login ID and password is created.

The notification process code is used to send e-mail notifications to the vendor when a new reverse auction is created and the vendor is invited to participate, or when an offer is accepted or rejected.

The notification processes can be defined on the Contact Person card, the Vendor card, or on the Web Site card.

If a notification process is specified on the Contact Person card of the vendor, the vendor will be notified according to this. If you leave the **Notif. Process Code** field on the Contact card blank, the vendor will be notified according to the notification process code on the Vendor card. If you also leave the **Notification Process Code** field on the Vendor card blank, the vendor will be notified according to the **Notif. Process Code** field on the Web Site card.

Assigning a Web portal Login ID and Passwords to Vendors

Vendors need to sign in to your Web portal with their login ID and password in order to be correctly identified to view personal information or place an offer on a reverse auction.

A login ID and password for vendors must be created from within Microsoft Navision or by a contact that is granted administrator permission and that is related to the current vendor. The login ID must be entered on the Contact card, and you can create the password by running the create password batch job.

NOTE: The login ID must be unique. If you enter a login ID that all ready exists, a dialog box telling you this will appear.

When Microsoft Navision creates a Web portal login ID and password for a vendor, the vendor will receive an e-mail notification. The notification code in the **Password-Created Notif.** field in the notification process code defined on the Communication tab of the Web Site card determines the content of the e-mail.

This Web portal login ID and password is then used by the vendor to sign into your Web portal, which allows the vendor to place offers on reverse auctions, maintain information on items, enter delivery dates, and enter drop shipments.

To read about notification processes, see the section called "Setting up Notification Processes" in Chapter 2, "Setting up Microsoft Navision Commerce Portal."

Deleting a Web portal Login ID

You can also disable your Web portal vendors, which means that the vendor will no longer be able to sign in to your Web portal.

NOTE: It is not possible to delete a login ID if there is any reverse auction documents containing the login ID that are not posted.

Assigning Queue Priorities to Your Vendors

When you create a new Vendor card, the program automatically assigns the value Medium Priority to the vendor. However, you can assign different priorities to your vendors. When many Web portal users are browsing your Web portal and there are a large number of Web portal requests that need to be processed, the requests from your vendors with the highest priority will be processed first.

Exercises

In the following exercises, you create a new Contact Person card for a vendor. You also generate a new login and password. You assign roles to the contact to give your vendor contact person access to your Web portal.

Creating a New Contact

1. On the Sales & Marketing menu, click SALES→CONTACTS. The Contact window appears.

2. Press F3 and ENTER to create a new Contact card.

3. Complete the following fields with this information:

Tab	Field	Value
General		
	Type	Person
	Company No.	The Cannon Group PLC
	Name	Mason Bendixen
Communication		
	E-mail	<your email address> to view the email.

Tab	Field	Value
Commerce Portal		
	Login ID	mbendixen
	Notification Process Code	Basic

4. Click CONTACT→COMMERCE PORTAL ROLES. The Web portal User Roles window appears.

5. In the **Web portal Role Code** field, click the **AssistButton** to view a list of the Web portal roles. The Web portal Roles window appears.

6. In the **Code** field, find VEND, click the line and then click **OK**.

7. Commit the code to the field.

8. Escape back to the Contact Card window for Mason Bendixen.

9. To create a password for this contact, click FUNCTIONS→COMMERCE PORTAL→CREATE PASSWORD. A dialog window asks if you want to create a new password and send to the user. Click **Yes**.

10. A dialog box appears telling you that an email message containing a new Password will be sent to the user. Click **OK**.

11. On the **Commerce Portal** tab, the **Password** option is now selected.

    While in the Contact header, if you Zoom (CTRL+F8) and find the **Password** field, you see that an encrypted password has been added to this Contact Card table.

12. Open the email to see your password.

Manually Sending Emails with Passwords

If you do not have access to Microsoft® Outlook® within the class, but you have Outlook Express or Outlook installed and configured on the machine, you can manually send the email.

1. On the Administration menu, click APPLICATION SETUP→COMMERCE PORTAL→PERIODIC ACTIVITIES→COMMERCE PORTAL STATUS. The Commerce Portal Status window appears.

2. Click the **Communication** tab.

3. In the **No. of Queued E-mail Msgs** field, click the **AssistButton**.

4. Locate your email address from the list.

5. Click FUNCTIONS→RESEND MANUALLY. A Microsoft Office Outlook security dialog box appears. Select the **Allow Access for** option and click **Yes**.

6. Outlook then opens with the email notification to be sent to you.

7. Make note of the Login and Password within the body of the email.

8. Close the email without clicking **Send**.

Reverse Auction

A reverse auction is when you put a demand for purchasing products to one or more vendors on the Web portal. The participating vendors can then respond to your auction by placing an offer on the Web portal, stating delivery time and quantity. Finally, you choose which of the vendors you want to buy from.

Completing a reverse auction includes the following tasks:

- Setting up vendors as participants
- Creating a reverse auction
- Choosing participants
- Handling the responses
- Selecting a winner
- Participants

When a vendor has agreed to participate in your future reverse auctions, you must enable the vendor to be a participant. On the Vendor card, you can include the vendor in the group that can be invited to participate in a reverse auction. Before you invite a vendor to participate in a reverse auction, make sure that a Web portal user login ID and a password has been sent to the vendor.

Creating a Reverse Auction

Each reverse auction document in Microsoft Navision lists one item that is up for auction. The document consists of a header and some lines, similar to other documents in Microsoft Navision. The header contains relevant information about the item and the requirements of the reverse auction. The lines contain information about the participants and their responses to the reverse auction. Each reverse auction should have a unique identification number, so that both customer and vendor can make sure that they are referring to the same auction.

Public Reverse Auction

It is up to you whether the auction should be public or not. A public reverse auction results in an open reverse auction, where participating vendors are able to follow the auction progress. All vendor bids are made public for the rest of the participating vendors to view and react to. However, not all information about a vendor is made public to the other vendors. The vendors name or other information about the vendor is not displayed on the Web portal.

Choosing Participants

When you have filled in the header of the reverse auction document, you can choose the vendors you want to invite to participate. You can choose the participants one by one from the lines, or you can use the Suggest Reverse Auction Lines batch job to fill in the lines. Only vendors with a check mark in the **Reverse Auction Participant** field on the Vendor card and who have a Web portal login ID and password can participate. When you have filled in the reverse auction, you must release it so that it can be shown on your Web portal.

Handling the Responds

After you have released the reverse auction to the Web portal, you are able to receive responses from vendors. The responses will automatically be copied to the lines on the reverse auction. The lines contain information about the participants and their responses to the reverse auction.

Closing the Reverse Auction

When the closing date of the reverse auction has passed or you have decided to close the reverse auction, you can run the Close Reverse Auction for Offers batch job. This batch job changes the status of the reverse auction to Closed for Offers before you select the winner of the auction.

Selecting a Vendor

When the closing date has passed or you have closed the reverse auction by using the Close Reverse Auction for Offers batch job, you must choose a winner of the auction by running the Select Vendor batch job. If you have set up the relevant reverse auction notifications, the vendors will receive notifications of the result of the reverse auction.

Exercises

In the following exercises, you create a reverse auction, choose participants for it, and then release it to your Web portal. Then you log on to your Web portal (as a vendor) to place an offer on the reverse auction. Finally, you close the reverse auction, select a vendor, and make an order from the reverse auction.

Creating a Reverse Auction

1. On the Purchase menu, click ORDER PROCESSING→REVERSE AUCTIONS. The Reverse Auctions window appears:
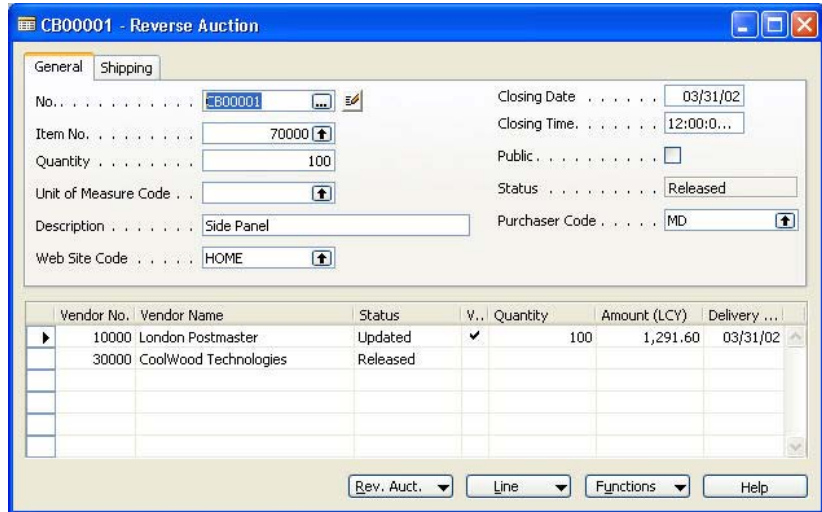
2. Press F3 and ENTER to create a new reverse auction.

3. In the **Item No.** field enter 70000.

4. In the **Quantity** field, enter 100.

5. In the **Web Site Code** field, enter the name of your website. In this example, enter home.

6. In the **Closing Time** field, enter 12.

7. Click FUNCTIONS→SUGGEST REVERSE AUCTION LINES.

   The program creates a reverse auction line for all vendors assigned to the item listed for auction. That is, only the vendors who have a check mark in the **Reverse Auction Participants** field on the Vendor card will be included in the list of participants.

8. To release the reverse auction to your Web portal, click FUNCTIONS→RELEASE. The Release Reverse Auctions batch job window appears.

9. Click **OK**.

   The **Status** field on the Reverse Auction header and lines now display Released.

10. Make note of the Reverse Auction No.

Making a New Bid on a Reverse Auction

1. Start the Internet browser and enter the address of your Web portal, the website appears in you browser.

2. Log on to your Web portal as Mason Bendixen.

3. From the menu, click **Reverse Auctions**. The **Reverse Auctions** list appears.

4. Click the line for the Reverse Auction number noted in step 10 of the previous exercise.

5. Place an offer for the reverse auction with the following data:

Field	Value
Item Number	70000
Quantity	101
Expected Receipt Date	Enter a date a few days after the Offerdeadline date.
Currency	British Pound
Unit Price	20

6. To submit the order, click **Update**. You have now placed an offer for the reverse auction.

7. Go back to Microsoft Navision and on the Purchase menu, click ORDER PROCESSING→REVERSE AUCTIONS. The Reverse Auctions window appears.

8. Find the reverse auction you have placed an offer on and check the data. Notice that on the line for the vendor associated with your vendor Contact Card (Vendor 10000), the **Quantity**, **Amount (LCY)**, and **Delivery Date** fields are updated with the values you entered in step 5. Also notice that the **Status** field for this line has been changed to Updated.

9. Do not close the Reverse Auction window.

Closing the Reverse Auction

1. On the Reverse Auction window from the previous exercise, click FUNCTIONS→CLOSE REVERSE AUCTION FOR OFFERS. The Close for Offers batch job window appears.

2. Click **OK** to continue.

3. In the header, the status of the Reverse Auction has now changed to Closed for Offers.

4. Do not close the Reverse Auctions window.

Selecting a Vendor and Making a Purchase Order

1. On the Reverse Auction window from the previous exercise, click the line for Vendor 10000.

2. Click FUNCTIONS→SELECT VENDOR. The line of the selected vendor is now bold.

3. Click FUNCTIONS→CREATE ORDER. The Create Order batch job window will appear.

4. Click **OK** to accept the creation of the order.

5. On the **Shipping** tab, you can see the order number that has been created. Make note of this Order No.

6. To see the order you have just created, on the Purchase menu, click ORDER PROCESSING→ORDERS. The Purchase Order window appears.

7. Locate the Order No. noted in step 5 above.

Test Your Knowledge – **Working with Reverse Auction**

1. All information about Web portal users is maintained on related
   _____ cards.

2. The _____
   field must be checked on the _____ card in order
   to eligible for a reverse auction, in addition to a Web portal login ID
   and password.

3. A reverse auction is _____
   _____.

4. The winner of the auction is selected by running the _____
   _____ function.

5. A/an _____ reverse auction results in an open reverse
   auction, where participating vendors are able to follow the auction
   progress.

Quick Interaction: Lessons Learned

Take a moment to write down three Key Points you have learned from this chapter:

1.

2.

3.

CHAPTER 6: COMMERCE PORTAL ARCHITECTURE AND ADMINISTRATION

- Overview
- System Architecture
- Request/Response
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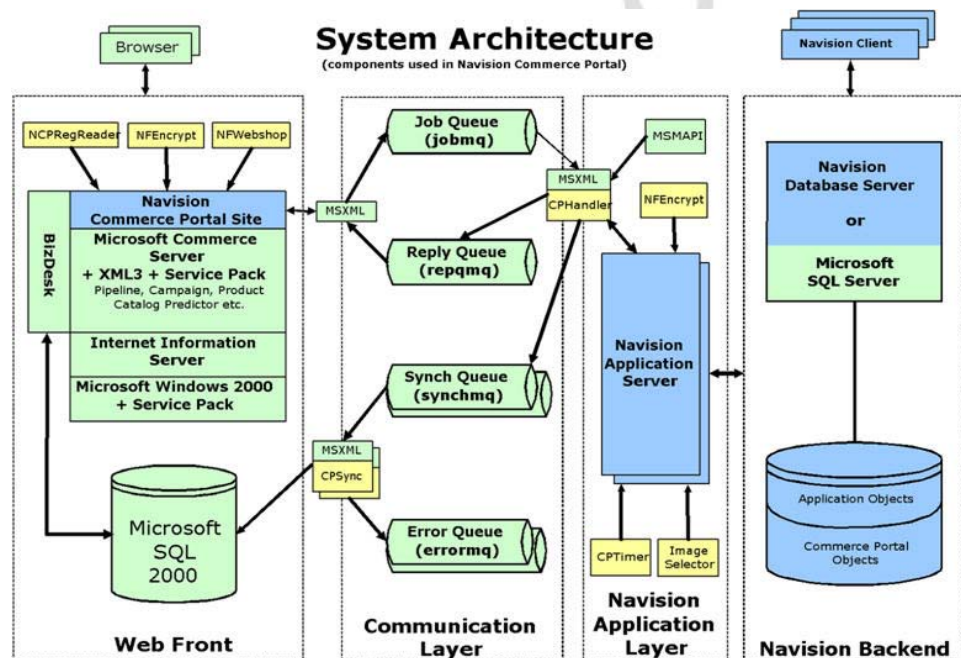
Overview

This chapter provides you with an overview of the architecture used for Microsoft® Business Solutions–Navision® Commerce Portal. An understanding of the architecture allows you to troubleshoot Commerce Portal issues.

System Architecture

The following diagram provides an overview of the system architecture of Commerce Portal. Commerce Portal is based on a four-tier model consisting of a Web front, a communication layer, a Navision Application layer and a Microsoft Navision backend. In Commerce Portal, all data is maintained from within Microsoft Navision but stored in both the Microsoft Navision database and in the SQL Server database. Synchronization between the two is done through messages sent through Microsoft Message Queuing (MSMQ). Navision Application Server is used to handle communication between Microsoft Navision and the Web portal.

System Architecture
(components used in Navision Commerce Portal)

Browser

Navision Client

NCPRegReader | NFEncrypt | NFWebshop

Job Queue (jobmq)

MSMAPI

MSXML CPHandler

NFEncrypt

BizDesk

Navision Commerce Portal Site
Microsoft Commerce Server
+ XML3 + Service Pack
Pipeline, Campaign, Product Catalog Predictor etc.

MSXML

Reply Queue (repqmq)

Navision Database Server
or
Microsoft SQL Server

Internet Information Server

Navision Application Server

Microsoft Windows 2000
+ Service Pack

Synch Queue (synchmq)

MSXML CPSync

Microsoft SQL 2000

Error Queue (errormq)

CPTimer | Image Selector

Application Objects

Commerce Portal Objects

Navision Application Server

Web Front | Communication Layer | Navision Application Layer | Navision Backend

Data Interchange between the Web Front and the Backend

The communication between the Web front and the backend includes several stages of data interchange:

- A request is sent from the Web front to the Job message queue.
- Navision Application Server receives the job request messages from the CPHandler.
- Microsoft Navision sends back the reply message to the Web front through the Reply message queue.
- The Web front receives the reply message.

Each of these stages is described in detail in the following sections.

Sending a Request from the Web Front to the Job Message Queue

1. Using ASP code, the program creates an XML document using Microsoft® XML Core Services (MSXML) with the globally unique identifier (GUID) number left blank.

2. The website ASP code calls the MSMQ (job queue) send method which returns a GUID. The ASP code now starts to listen to the MSMQ (reply queue) looking for message with the previously stored GUID.

3. When the correct message is found, the ASP code receives it and starts processing the XML document in the message.

Processing Requests from the Web Portal
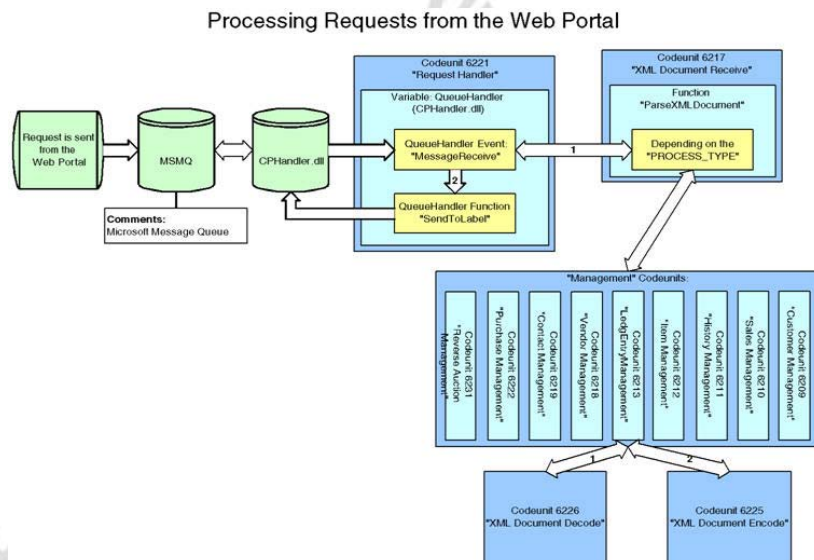
Receiving the Job Request Messages from the CPHandler

1. The CP Handler "cQueueHandler" method exposes the "MessageReceived" event. This event exists in Microsoft Navision as a trigger which is fired as soon as a message is ready to be processed.

2. The XML document is extracted by the Queue Handler.

3. Codeunit 6221 (Request Handler) extracts the process type and login ID (to determine the queue priority). It creates a log entry in the "Message Log Header" table. Then it calls Codeunit 6217 (XML Document Receive).

4. Codeunit 6226 (XML Document Decode) receives the message and checks whether the GUID number of the XML document is blank. If it is blank, the process is stopped and an error message is sent back to the Web front.

Sending and Receiving the Reply Message

1. Depending on the process type, one of the management codeunits processes the XML document.

2. Codeunit 6225 (XML Document Encode), creates the reply XML document. The previously extracted GUID is added as an element.

3. The reply XML document is sent back to the Queue Handler by Codeunit 6221 (Request Handler). The Queue Handler sends it to the MSMQ (reply queue).

Synchronization

Data that is relevant for Commerce Portal is stored in both the Microsoft Navision database and in the SQL Server database.

In Commerce Portal, all data is maintained in Microsoft Navision. This includes item names, descriptions, prices, translations, and availability. The program also maintains information about your Web portal users, the text on your Web pages, and to some extent the design of your Web portal.

The synchronization between the two databases is done through messages sent using MSMQ.

Automated Synchronization

The following diagram shows how the records in Microsoft Navision are synchronized with the SQL Server database. Synchronization is triggered by the Microsoft Navision C/SIDE triggers OnInsert, OnModify, OnRename and OnDelete. The following diagram shows this process using Table 8 (Language) as an example.

Synchronization
(example with Table Language)
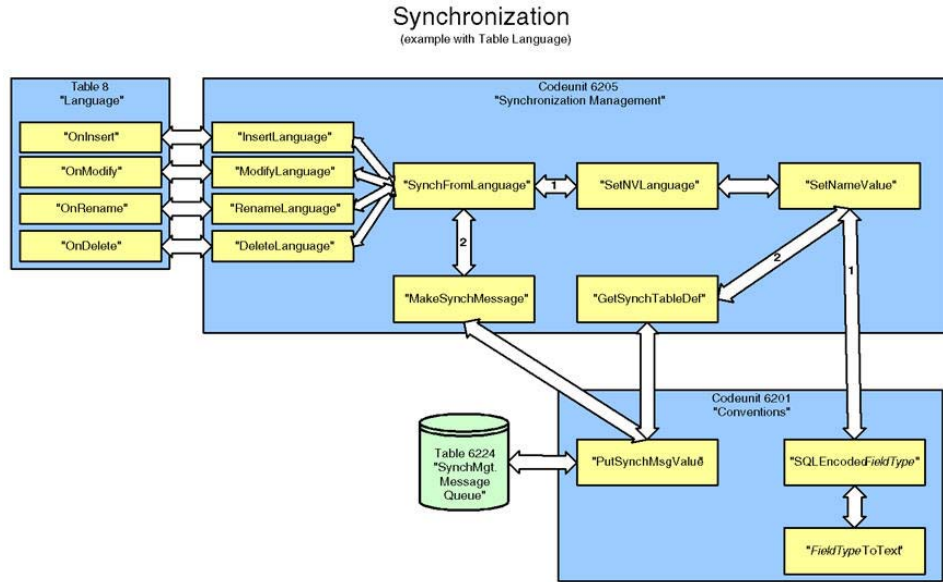
You can use this as guidance when customizing the synchronization processes, for example, when adding new fields or tables.

The last stage in the synchronization process is that the program places the data in the SynchMgt. Message Queue table (6224) and Navision Application Server collects the data from this table and submits it to MSMQ (the sync queue).

Force Synchronization

When you first install Commerce Portal, you have to force synchronization to initialize the SQL Server. Similarly, when you add fields or tables to the synchronization, you need to force the synchronization to initialize again.

To synchronize your SQL Server database with the Microsoft Navision database (force synchronization), follow this procedure:

1. On the Administration menu, click APPLICATION SETUP→COMMERCE PORTAL→PERIODIC ACTIVITIES→SYNCHRONIZATION. The Synchronized Tables List window appears.

2. Click the lines containing the tables you want to synchronize.

3. Click FUNCTIONS→FORCE SYNCHRONIZATION. A dialog box appears asking if you want to force synchronization of the Item table. Click **Yes**.

A window with a status bar appears on the screen until the synchronization has completed. Depending on your configuration and hardware, this process can take several hours.

NOTE: The synchronization procedure creates XML messages. The Navision Application Server and the Microsoft Navision Commerce Portal synchronization service handles the synchronization of the SQL Server database with the Microsoft Navision database. The synchronization is done through MSMQ using a Windows NT service (Microsoft Navision Commerce Portal Synchronization), which is included in the Commerce Portal installation.

Troubleshooting Synchronization

In the following exercises, you troubleshoot the synchronization of data from the SynchMgt. Message Queue table (6224) in Microsoft Navision to the SQL Server. This is done by disabling components one at a time to see how far the data can go with that component disabled. This shows you the key places to start your troubleshooting. If no data is entered in the SynchMgt. Message Queue table (6224), you must troubleshoot within Microsoft Navision.

For an overview of how records are synchronized to the SQL Server, see the diagram in the previous section, "Automated Synchronization."

Overview

Data is stored in the SynchMgt. Message Queue table (6224) when you run the Force Synchronization batch job or when you modify data in a table that contains synchronization data. The data is only deleted from the SynchMgt. Message Queue table if a MSMQ message is created in the Synch. message queue requiring this deletion. From the Synch message queue the message can only go to SQL Server or the Error message queue.

The data is collected by Navision Application Server and stored in a MSMQ message. The CPHandler places the message in the Synch. message queue.

The Commerce Portal synchronization service retrieves the messages from MSMQ. If Commerce Portal synchronization can process the message, it is sent to SQL Server. Otherwise, the message is sent to the Error message queue attached to the error message describing the error.

The components used in synchronization are highlighted in the diagram below.
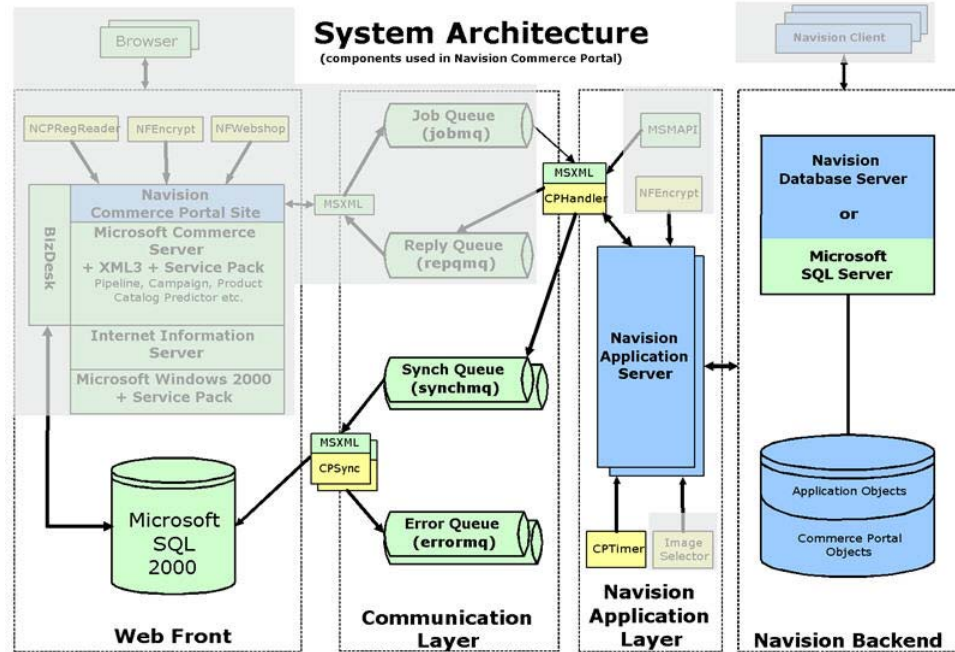
For more information about error handling, see the Common Error document in the "Channel Readiness Kit for E-Commerce."

Exercise – Troubleshooting Navision Application Server

To do this exercise, you need to complete the following five tasks:

- Stop the Navision Application Server.
- Synchronize the Currency table.
- Verify the data.
- Restart the Navision Application Server.
- Verify that the data has been removed.

Each of these tasks is described in detail in the following sections.

Stopping the Navision Application Server

1. On your Desktop, right-click **My Computer** and click **Manage**.

2. Expand Services and Applications and click **Services**.

3. Right-click **Navision Application Server Computername-CLASSIC** and click **Stop**.

Synchronizing the Currency Table

1. In Microsoft Navision, on the Administration menu, click APPLICATION SETUP→COMMERCE PORTAL→PERIODIC ACTIVITIES→SYNCHRONIZATION. The Synchronized Tables List window appears.

2. Click the line containing Currency (table 4).

3. Click FUNCTIONS→FORCE SYNCHRONIZATION. A dialog box appears asking if you want to force synchronization of the Item table. Click **Yes**.

Verifying the Data in SynchMgt. Message Queue Table

1. On the Tools menu, click **Object Designer** and then click **Table**.

2. In the **Name** field, find the SynchMgt. Message Queue table (6224).

3. Click **Run**. The SynchMgt. Message Queue – Table window appears.

   Verify that the currency data you want synchronized appears.

Restarting the Navision Application Server

1. On your Desktop, right-click **My Computer** and click **Manage**.

2. Expand Services and Applications and click **Services**.

3. Right-click **Navision Application Server Computername-CLASSIC** and click **Start**.

Verifying the Removal of Data in the SynchMgt. Message Queue Table

1. In Microsoft Navision, on the Tools menu, click **Object Designer** and then click **Table**.

2. In the **Name** field, find the SynchMgt. Message Queue table (6224).

3. Click **Run**. The SynchMgt. Message Queue – Table window appears.

   Verify that the currency data has been removed.

NOTE: The Navision Application Server checks the table every 10 seconds, as controlled by the CPTimer. Therefore you may need to refresh the table a few times before you can verify that the data has been removed.

Synch. Message Queue Properties

The CPHandler.dll retrieves the messages from the Navision Application Server and places them in the private Synch. message queue. The security properties for the Synch. message queue must grant full control to everyone. If the properties are not set correctly, the CPHandler cannot access the message queue and the data remains in the SynchMgt. Message Queue table (6224).

Exercise – Synch. Message Queue Administration

In this exercise, you change the security settings of the Synch. message queue to ensure that the data stays in the SynchMgt. Message Queue table (6224). It is very important to choose the settings as described in the following procedure. If you select Deny to all settings you will not be able to change the settings back and you will have to reinstall MSMQ.

To do this exercise, you need to complete the following five tasks:

- Change the Synch. message queue's security settings.
- Synchronize the Currency table.
- Verify the data.
- Reset the security settings for the Synch. message queue.
- Verify that the data has been removed.

Changing the Security Settings for the Synch. Message queue

1. On your Desktop, right-click **My Computer** and click **Manage**.

2. Expand **Services and Applications**, click **Message Queuing** and then click **Private Queues**. The list of Private Queues appears.

3. Right-click the **Synch. Message Queue** (possibly labeled synchmq) and click **Properties**. The Properties window appears.

4. On the **Security** tab, in the **Name** field, click **Everyone**.

5. In the **Permissions** field, under **Full Control**, click **Deny**.

6. In the Permission section, verify that the **Allow** option is selected for **Get Properties** and **Get Permissions**. This allows you to set the settings correctly after this exercise.

7. Click **OK**. A message appears asking you to confirm the changes. Click **Yes**.

Synchronizing the Currency Table

1. In Microsoft Navision, on the Administration menu, click
   APPLICATION SETUP→COMMERCE PORTAL→PERIODIC
   ACTIVITIES→SYNCHRONIZATION. The Synchronized Tables List window appears.

2. Click the line containing Currency (table 4).

3. Click FUNCTIONS→FORCE SYNCHRONIZATION. A dialog box appears asking if you want to force synchronization of the Item table. Click **Yes**.

Verifying the Data in the SynchMgt. Message Queue

1. On the Tools menu, click **Object Designer** and then click **Table**.

2. In the **Name** field, find the SynchMgt. Message Queue table (6224).

3. Click **Run**. The SynchMgt. Message Queue – Table window appears.

4. Verify that the currency data you want synchronized appears.

Resetting the Security Settings for Synch. Message Queue

1. On your Desktop, right-click **My Computer** and click **Manage**.

2. Expand **Services and Applications**, click **Message Queuing** and then click **Private Queues**. The list of Private Queues appears.

3. Right-click **synchmq** (the Synch. Message Queue) and click **Properties**. The synchmq Properties window appears.

4. On the **Security** tab, in the **Name** field, click **Everyone**.

5. In the **Permissions** field, under **Full Control**, click **Allow**.

Verifying the Removal of Data from the SynchMgt. Message Queue Table

1. In Microsoft Navision, on the Tools menu, click **Object Designer** and then click **Table**.

2. In the **Name** field, find the SynchMgt. Message Queue table (6224).

3. Click **Run**. The SynchMgt. Message Queue – Table window appears.

4. Verify that the currency data has been removed.

The message has now been processed by CPHandler and sent to SQL Server through the Synch. message queue.

Navision Commerce Portal Synchronization Service

The Navision Commerce Portal Synchronization service monitors the Synch. message queue and processes all the messages in it. These messages are either sent to the Commerce Server or to the Error message queue.

Exercise – Commerce Portal Synchronization Service Administration

To do this exercise, you need to complete the following six tasks:

- Stop the Navision Commerce Portal Synchronization service.
- Verify that the Synch. message queue is empty.
- Synchronize the Currency table from Commerce Portal.
- Verify that the Synch. message queue contains messages.
- Restart the Navision Commerce Portal Synchronization service.
- Verify that the Synch. message queue is empty.

Stopping the Navision Commerce Portal Synchronization

1. On your Desktop, right-click **My Computer** and click **Manage**.
2. Expand Services and Applications and click **Services**.
3. Right-click **Navision Commerce Portal Synchronization** and click **Stop**.

Verifying that the Synch. Message Queue is Empty

1. On your Desktop, right-click **My Computer** and click **Manage**.
2. Expand **Services and Applications**, click **Message Queuing** and then click **Private Queues**. The list of Private Queues appears.
3. Resize the window so you can see the Messages column in the right pane.
4. Press F5 to refresh.
5. Verify that there are no messages in the Synch. message queue.

Synchronizing the Currency table

1. In Microsoft Navision, on the Administration menu, click APPLICATION SETUP→COMMERCE PORTAL→PERIODIC ACTIVITIES→SYNCHRONIZATION. The Synchronized Tables List window appears.
2. Click the line containing Currency (table 4).
3. Click FUNCTIONS→FORCE SYNCHRONIZATION. A dialog box appears asking if you want to force synchronization of the Item table. Click **Yes**.

Verifying that the Synch. Message Queue Contains Messages

1. On your Desktop, right-click **My Computer** and click **Manage**.

2. Expand **Services and Applications**, click **Message Queuing** and then click **Private Queues**. The list of Private Queues appears.

3. Resize the window so you can see the Messages column in the right pane.

4. Press F5 to refresh.

5. Verify that there are messages in the Synch. message queue.

Restarting Navision Commerce Portal Synchronization

1. On your Desktop, right-click **My Computer** and click **Manage**.

2. Expand Services and Applications and click **Services**.

3. Right-click **Navision Commerce Portal Synchronization** and click **Start**.

Verifying that the Synch. Message Queue Is Empty

1. On your Desktop, right-click **My Computer** and click **Manage**.

2. Expand **Services and Applications**, click **Message Queuing** and then click **Private Queues**. The list of Private Queues appears.

3. Resize the window so you can see the Messages column in the right pane.

4. Press F5 to refresh.

5. Verify that there are no messages in the Synch. message queue.

The messages have been picked up by the Navision Commerce Portal Synchronization service and sent to SQL Server.

NOTE: You can verify that the messages are sent to SQL Server by deleting the COMMERCE_CURRENCY table in the CommercePortal_commerce database in the SQL Server Enterprise Manager prior to running the synchronization. The synchronization process recreates this table.

Error Message Queue

The messages that, for one reason or another, cannot be processed by Navision Commerce Portal synchronization end up in the Error message queue.

Exercise – Error Message Queue Administration

In this exercise, you change the Connection String in the Commerce Portal setup so that it contains incorrect information. Then you restart the Navision Commerce Portal Synchronization service to have the changes take effect. After the synchronization process, you see the resulting messages in the Error message queue. Then correct the setup and start Navision Commerce Portal Synchronization again to see that the messages in the Error message queue are still there but a new synchronization has been successful.

To do this exercise, you need to complete the following eight tasks:

- Change the Commerce Portal setup.
- Restart the Navision Commerce Portal Synchronization service.
- Synchronize the Currency table.
- Verify the error messages in the Error message queue.
- Reset Commerce Portal Setup.
- Restart the Navision Commerce Portal Synchronization.
- Synchronize the Currency table.
- Verify the Error message queue.

Changing Commerce Portal Setup

1. In Microsoft Navision, on the Administration menu, click APPLICATION SETUP→COMMERCE PORTAL→COMMERCE PORTAL SETUP. The Commerce Portal Setup window appears.

2. Click the **Communication** tab.

3. In the **Initial Catalog** field, enter the name of a nonexistent catalog, for example, Wrong Catalog.

Restarting the Navision Commerce Portal Synchronization

1. On your Desktop, right-click **My Computer** and click **Manage**.

2. Expand Services and Applications and click **Services**.

3. Right-click **Navision Commerce Portal Synchronization** and click **Restart**.

Synchronizing the Currency table

1. In Microsoft Navision, on the Administration menu, click APPLICATION SETUP→COMMERCE PORTAL→PERIODIC ACTIVITIES→SYNCHRONIZATION. The **S**ynchronized Tables List window appears.

2. Click the line containing **Currency** (table 4).

3. Click FUNCTIONS→FORCE SYNCHRONIZATION. A dialog box appears asking if you want to force synchronization of the Item table. Click **Yes**.

Verifying That there Are Error Messages in the Error Message Queue

1. On your Desktop, right-click **My Computer** and click **Manage**.

2. Expand **Services and Applications**, click **Message Queuing** and then click **Private Queues**. The list of Private Queues appears.

3. Resize the window so you can see the Messages column in the right pane.

4. Press F5 to refresh.

5. Verify that there are messages in the Synch. message queue.

There are twice as many messages in the Error message queue as in the Synch. message queue because the Navision Commerce Portal synchronization creates a message containing the error description for each message, and also sends this to the Error message queue.

Resetting Commerce Portal Setup.

1. In Microsoft Navision, on the Administration menu, click APPLICATION SETUP→COMMERCE PORTAL→COMMERCE PORTAL SETUP. The Commerce Portal Setup window appears.

2. Click the **Communication** tab.

3. In the **Initial Catalog** field, enter the correct name of the catalog this is used on your Web portal, for example, CommercePortal_COMMERCE.

Restarting Navision Commerce Portal Synchronization

1. On your Desktop, right-click **My Computer** and click **Manage**.

2. Expand Services and Applications and click **Services**.

3. Right-click **Navision Commerce Portal Synchronization** and click **Restart**.

Synchronizing the Currency Table

1. In Microsoft Navision, on the Administration menu, click
   APPLICATION SETUP→COMMERCE PORTAL→PERIODIC
   ACTIVITIES→SYNCHRONIZATION. The Synchronized Tables List
   window appears.

2. Click the line containing Currency (table 4).

3. Click FUNCTIONS→FORCE SYNCHRONIZATION. A dialog box appears
   asking if you want to force synchronization of the Item table. Click
   Yes.

Verifying That there Are No New Error Messages in the Error Message Queue

1. On your Desktop, right-click **My Computer** and click **Manage**.

2. Expand **Services and Applications**, click **Message Queuing** and
   then click **Private Queues**. The list of Private Queues appears.

3. Resize the window so you can see the Messages column in the right
   pane.

4. Press F5 to refresh.

5. Verify that there are no messages in the Synch. message queue.

The messages have been picked up by the Navision Commerce Portal
Synchronization service and sent to SQL Server.

Exercise – Troubleshooting Navision Application Server

You can use the previous exercise to test whether the Navision Application
Server is the cause of an unsuccessful synchronization. This is the case if you can
see the data in the SynchMgt. Message Queue table (6224).

You can then check to see if the Navision Application Server is running before
you start the following exercise.

If the Navision Application Server is running, you can also check the database
information in Microsoft Navision to verify that you are using the correct
connections.

1. In Microsoft Navision, on the File menu, click DATABASE→
   INFORMATION. The Database Information window appears.

2. Click the **Connection** tab and verify that the client is connected to
   the server.

3. Click the **Sessions** tab and verify that there are two current sessions,
   one for the Navision Application Server and one for the Client. Both
   of these sessions should be using Windows login.

Another cause of trouble with the Navision Application Server can be that the CPHandler.dll is not registered properly. This results in a warning event for computername-CLASSIC. You can view the event using the Event Viewer in the Computer Management window.

This event has the following description:

```
Trigger 99 in Codeunit 1 does not exist.
This trigger must be executed to establish connection to
the Message Bus.
```

In the following diagram, you can see that Navision Application Server depends on the CPHandler.dll in order to initiate the QueueHandler.

Starting the Navision Application Server
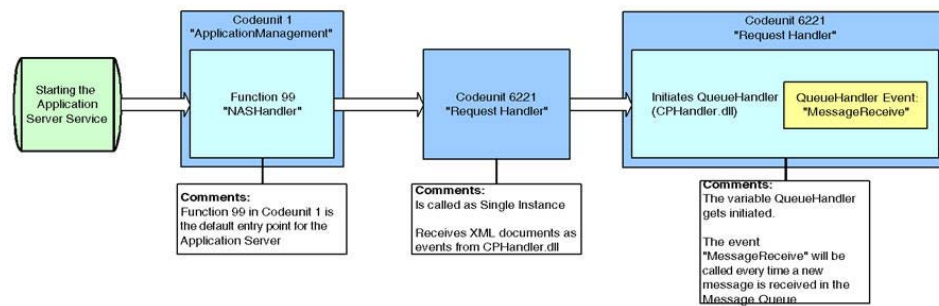
You need to register the CPHandler.dll again.

4. On the Start menu, click **Run** and enter regsvr32"C:\ProgramFiles\Navision\Client\CPHandler.dll".

5. Restart the computer.

Monitoring the Status of Commerce Portal

When users browse your Web portal, SQL Server and Microsoft Navision create and process a number of messages through Microsoft Commerce Server.

To maintain Commerce Portal, you must:

- Monitor the Commerce Portal status.
- Delete expired or rejected quotes.
- Handle unprocessable messages.
- Monitor the message log.

Commerce Portal Status

The status of Commerce Portal can be divided into two categories:

- Sales related to Commerce Portal
- Communication between SQL Server and Microsoft Navision

The sales and communication status of Commerce Portal is monitored from the Commerce Portal Status window.

On the **Sales** tab you can monitor the number of sales quotes that have been:

- Accepted by the customer.
- Expired before the customer request.
- Rejected by you or one of your colleagues.

On the **Communication** tab you can monitor:

- Unprocessable e-mail messages.
- Pictures and records that need to be updated or synchronized with SQL Server.

Each field has an **AssistButton** which lets you view the message queues.

Unprocessable e-mail messages can be deleted or modified, and then processed manually in the E-Mail Queue window, or you can modify the e-mail message, and then send it again.

Deleting Expired or Rejected Quotes

In time, a number of sales quotes will be created through your Web portal. The customer may never accept some of these sales quotes, and therefore they will expire. Other sales quotes may be incorrectly filled in, or there may be other reasons why you want to reject them.

Therefore, a number of invalid sales quotes will be registered in your Microsoft Navision Sales & Marketing, Order Processing area. You can, of course, delete the sales quotes manually as you would delete any other sales quote, however the Commerce Portal solution provides a batch job that can delete several expired and/or rejected sales quotes at once.

Exercises

In these exercises, you use the Delete Expired or Rejected Quotes batch job to maintain your Commerce Portal. First, enter the required information about yourself in the Web portal so that Microsoft Navision can create a new Customer card, a contact person card and a sales quote for you. Open your Web portal and place an order. Then go back to Microsoft Navision and reject the newly created sales quote, and finally, you will delete the rejected sales quote.

Registering as a New Customer

Because you have not signed in to your Web portal, you are an unknown customer. Therefore you have to register as a new customer on your Web portal.

1. Open your browser.

2. In the Commerce Portal window, click **Register**.

3. Fill in the fields as followed:

Field	Value
Name	Dan Jump
Street Name and Number	Hollywood Blvd. 102
Town/City	Los Angeles
Country	USA
Phone No.	555-555-1234
E-Mail	Dan.jump@cronuscorp.net
Login Name	danjump1
Password	djump1
Confirm Password	djump1

4. Click **Submit**.

Placing an Order and Accepting Purchases

Create an order for the following items: Item No. 1968 GRENOBLE
Whiteboard, red; and Item No. 1928-W, ST.MORITZ Storage Unit/Drawers.

1. In the Commerce Portal window, in the **Login Name** field, enter
   danjump1.

2. In the **Password** field, enter djump1.

3. Under Catalog Categories, click **Whiteboards**.

4. Click 1968-W: GRENOBLE Whiteboard, red.

5. Click **Add to Shopping Cart**.

6. Click **Catalog**.

7. Under Catalog Categories, click **Storage Units**.

8. Click 1928-W: ST.MORITZ Storage Unit/Drawers.

9. Click **Add to Shopping Cart**.

10. In the Select items to buy now window, click **Continue**.

11. In the Select Address window, click **Continue**.

12. In the Order Confirmation window, click **Purchase**.

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*NOTE: A credit card may be required at this point. Attempt to enter a fake credit card
number (5555555555555555) and if you are unable to finish this purchase, close the
browser. You will not be able to complete the next two exercises but you can still look
at the forms.*

Locating and Rejecting Sales Quotes

1. In Microsoft Navision, on the Sales & Marketing menu, click ORDER
   PROCESSING→QUOTES. Locate the sales quote that has just been
   created.

2. Click FUNCTIONS→COMMERCE PORTAL→REJECT to reject the quote.

3. The sales quote has been rejected.

4. Click the **Commerce Portal** tab. The **CP Status** field displays the
   status of this Sales Quote.

Deleting Rejected Sales Quotes

1. In Microsoft Navision, on the Administration menu, click APPLICATION SETUP→COMMERCE PORTAL→PERIODIC ACTIVITIES→COMMERCE PORTAL STATUS. The Commerce Portal Status window appears.

2. Click COMMERCE PORTAL→DELETE EXPIRED OR REJECTED QUOTES. The Delete Expd./Rejected Qte. batch job window appears.

3. Click the **Options** tab and select the **Delete Rejected Quotes** option.

4. Click **OK** to start the batch job.

When the batch job has finished, on the Sales & Marketing menu, click ORDER PROCESSING→QUOTES to verify that the sales quote has been deleted.
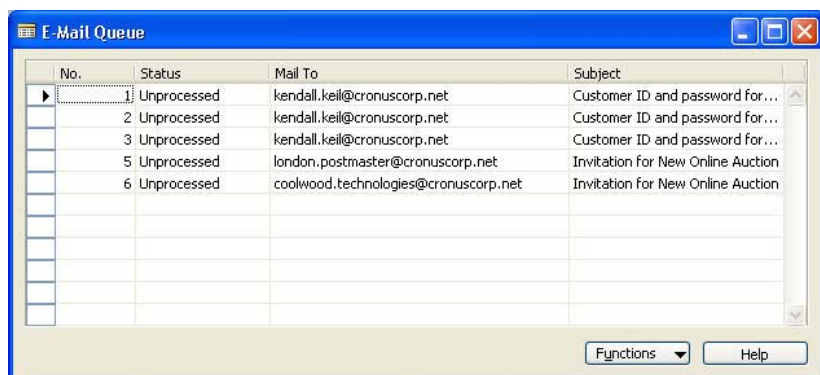
Unprocessable E-Mails

The processing of e-mails in Commerce Portal might not succeed for a number of reasons. As a result, unprocessable e-mails are logged, and you can then process the e-mails manually.

To examine unprocessable e-mail messages, follow this procedure:

1. On the Administration menu, click APPLICATION SETUP→COMMERCE PORTAL→PERIODIC ACTIVITIES→COMMERCE PORTAL STATUS. The Commerce Portal Status window appears.

   On the **Communication** tab, the **No. of Unprocessed E-Mail Msgs.** field contains the number of e-mail messages that have not been processed by the application server.

2. To view a list of unprocessable e-mails, in the **No. of Unprocessed E-Mail Msgs.** field, click the **AssistButton**. The E-Mail Queue window appears:

The E-Mail Queue window displays the e-mails that are not being processed by the application server. You have two possibilities to resend these e-mails:

– Click the e-mail you want processed and click FUNCTIONS→RESEND MANUALLY. The e-mail will be sent from your own account and not from Microsoft Navision.

– Select the e-mail that you want processed and click FUNCTIONS→ REPROCESS. The e-mail will be put back into the message queue and the application server will attempt to resend it.

3. Click FUNCTIONS→REPROCESS to manually process any messages.

Monitoring the Message Log

If you have set up Commerce Portal to log all incoming and outgoing messages to and from the Web portal, you can view these in the Message Log window.

1. To ensure that all communication is logged, on the Administration menu, click APPLICATION SETUP→COMMERCE PORTAL→APPLICATION SERVER CARD. The Application Server Card window appears.

2. Click the **Actions** tab and select the **Log Communication** option.

All synchronization from Microsoft Navision to the SQL server, except from the picture synchronization, is logged. The synchronization is logged in the Message Log Header and the Message Log Lines tables.

In addition to the synchronization, the normal communication between the Web front and Microsoft Navision is also logged according to the set up.

3. To view the message log, on the Administration menu, click IT ADMINISTRATION→COMMERCE PORTAL→COMMUNICATION→MESSAGE LOG. The Message Log window appears.

The header contains information about the time, subject and direction of the messages sent between Microsoft Navision and your Web portal. The **Message Direction** field shows whether the message in the log is incoming or outgoing. The lines show the content of the XML document that was transferred.

4. To delete messages, on the Administration menu, click IT ADMINISTRATION→DATA DELETION→DELETE MESSAGE LOG ENTRIES. The Delete Message Log Entries window appears.

If you do not fill in the Filter fields, all entries will be deleted when you click **OK**.

Test Your Knowledge – Commerce Portal Architecture & Administration

1. When you first install Commerce Portal, you have to _____ _____to initialize the SQL Server.

2. The messages that cannot be processed by Navision Commerce Portal synchronization end up in the _____.

3. All synchronization from Navision to the SQL Server, except the _____, will be logged in the Message Log.

4. The _____ _____ monitors the Synch. Message queue and processes all the messages in it.

5. Synchronization between the Microsoft Navision database the SQL Server database is done through messages sent through _____ _____.

6. The Navision Application Server receives the job request messages from the _____.

7. The status of Commerce Portal can be divided into two categories: _____ _____.

8. Synchronization is triggered by the Microsoft Navision C/SIDE triggers _____.

9. Data is stored in the _____ _____ table when you run the Force Synchronization batch job or when you modify data in a table that contains synchronization data.

10. The _____ retrieves the messages from the Navision Application Server and places them in the private Synch. Message queue.

11. Commerce Portal is based on a four-tier model consisting of _____
    _____
    _____.

12. One cause of trouble with the Navision Application Server may be that the CPHandler.dll is not _____ properly.

Quick Interaction: Lessons Learned

Take a moment to write down three Key Points you have learned from this chapter:

1.

2.

3.

APPENDIX A: TEST YOUR KNOWLEDGE SOLUTIONS

Test Your Knowledge – Introduction to Commerce Portal (CH1)

1. Before you can begin this course you must install Microsoft® Business Solutions–Navision®, Commerce Portal, and a number of Microsoft products.

2. Name the two sets of clients involved in using Commerce Portal and describe their functions.

   – Microsoft Navision clients. These are connected to your company's local area network and are used by you and your colleagues. Microsoft Navision clients do not have to be dedicated specifically to the Commerce Portal. These clients can act as normal Microsoft Navision clients because all information requested or created through the Internet on your Web portal is processed like any other information in Microsoft Navision.

   – Web browsers. These are connected to the Internet and are used by the users of your Web portal. Web browser clients can be of any type and can be started from any platform. The design of your home page determines the requirements for Web browsers; for example, whether or not Web browsers have to support frames.

3. Briefly describe some of the synchronization features between Microsoft Navision and Commerce Portal.

   All data is maintained in Microsoft Navision. Data used in the Web portal is synchronized with Microsoft® SQL Server®. After the first synchronization is carried out, the SQL Server is synchronized every time you update information in Microsoft Navision that is relevant for the Commerce Portal. For example, changing the name of an item will automatically create a message that updates the item name in the SQL Server database.

   When a user who is signed on your Web portal requests information about a specific item, the static data – such as item number and item name – is retrieved from the SQL Server database. By comparison, the variable data – such as item price and item availability – is retrieved from the Microsoft Navision database.

4. Name a few of the key features of Commerce Portal.

– Data is maintained only in Microsoft Navision.
– You can create multiple websites.
– You can define the permissions for your Web portal users based on roles.
– You can set up automatic email notifications to Web portal users and colleagues to provide them with updates on the handling of their sales or purchase order.
– You can set up specific language-dependent text and descriptions, to be used on your Web portal.
– You can increase the efficiency of your purchasing activity by listing items you want to order on your Web portal and inviting your vendors to participate in a reverse auction.
– Web pages are maintained from within Microsoft Navision.
– Commerce Portal has full integration with the rest of the Microsoft Navision Application.
– Commerce Portal supports GIF and JPG picture formats.

5. Do users need to learn a new interface in order to use Commerce Portal? Explain how data can be maintained in Microsoft Navision and Commerce Portal.

No, Microsoft Navision users do not need to familiarize themselves with a new user interface. From within Microsoft Navision, they can update the Web portal user and item information, handle sales quotes, sales orders, reverse auctions, and similar activities.

Customer information on the Customer card and Contact card can be maintained from the Web portal as well as from within Microsoft Navision.

All data relevant to the Commerce Portal is synchronized with (copied to) the SQL Server database so that the data is stored in both the Microsoft Navision database and the SQL Server database. The program automatically synchronizes the SQL Server database and, subsequently, the Web pages on the Web portal with the Microsoft Navision database.

6. Explain when an email notification might be used.

– To notify Web portal users of specific events, the status of their orders and offers, and their new password and/or user ID.
– To notify you or your colleagues of information entered by users of your Web portal.

7. Briefly describe some of the integration between Microsoft Navision and Commerce Portal.

If a new customer places an order through your Web portal, their customer information will automatically be inserted in the Customer table in the Microsoft Navision database.

If an existing Web portal user places an order through your Web portal, they receive all discounts as indicated by their Customer card setup.

By using their user ID and password, each Web portal user can sign on to your Web portal and view their previously entered information.

Whenever you update your Item prices or names, or update the availability of an item, this data will be immediately updated on your Web portal.

An order placed on your Web portal is no different than one created from within Microsoft Navision.

Test Your Knowledge – **Setting up Microsoft Navision Commerce Portal (CH2)**

1. What are the two types of Notifications?

   – Internal notifications – to notify you or your colleagues
   – External notifications – to notify your Web portal users

2. What does setting up Commerce Portal include?

   – Information about your country, local currency, and decimal symbol.
   – Information about where to store pictures on the Web server as well as information used to communicate with the SQL Server.
   – Information about the Number Series to be used for Commerce Portal-initiated entries.

3. What do you need in order to create new Web Templates?

   You must have an ASP programmer set up ASP pages to determine the structure and layout of your website. When you have completed the setup of your Commerce Portal and your website, you are ready to create Web Templates by running the Create Web Template batch job.

4. Before using Commerce Portal, what will you need to enter and set up?

You must enter basic setup information that will apply to all of your websites. You also have to set up a website, roles, notification processes, Web Templates, synchronization, requests, and the Navision Application Server.

5. When setting up your website, what information must the website card contain?

– The address of your homepage.
– The path to the ASP files on the Web server.
– A quote expiration calculation formula.
– The profiles of template users.
– Notification codes and processes.
– Number Series for users and orders created through your Web portal.

6. Briefly explain Web Templates.

A Web Template in Commerce Portal is similar to a template in a word processing application. It is a document that contains formatting and sometimes generic text or other content. However, most of the content will be filled in on the specific Web page.

A website can contain any number of Web Templates. A Web Template can be used as a pattern for creating many Web pages. Each Web Template is based on an ASP page located on the Web server.

7. What are the four areas that the Commerce Portal framework is built upon?

Web portal, Web Sites, Web Templates, and Web Pages

8. What are the seven property types found on the Properties Template?

Text, Date, Time, Number, Picture, Link, and Subproperties

9. What is the Navision Application Server used for with Commerce Portal?

In Commerce Portal, the Navision Application Server is used to handle the communication between Navision and the Web portal.

10. Define Permissions and Web portal Roles.

   Each permission grants the Web user authorization to perform a task or a part of a task on your Web portal.

   Web portal Roles are a collection of different permissions that allow Web portal users to perform different tasks, such as business, maintenance, or administrative activities.

Test Your Knowledge – Setting up Web Pages (CH3)

True   False

☒   ❏   1. After a Web page has been created, you need to fill in or adjust the values of the properties.

❏   ☒   2. There are ~~three~~ **two** types of hyperlinks in Commerce Portal.

☒   ❏   3. Pictures can be imported into Commerce Portal if they are either GIF or JPEG format.

☒   ❏   4. You can create multiple Web Pages based on the same Web Template.

❏   ☒   5. The ~~Type~~ **Value** field of the Hyperlink contains the actual link.

☒   ❏   6. Each of your Web Pages is based on a Web Template.

❏   ☒   7. Web Pages refer to each other using ~~Page References~~ **hyperlinks**.

❏   ☒   8. Each Web Page has a set of properties defined by the Web Template. Therefore, you ~~can~~ **cannot** add additional properties to a Web page.

Test Your Knowledge – **Setting up Items and Customers (CH4)**

1. In the Catalog Editor, you select the <u>Searchable</u> option to include the category in your index.

2. You use the <u>Class</u> field on the Item Card to group your items on your Web portal.

3. The function used to synchronize the Item table to SQL Server database is called <u>Force Synchronization</u>.

4. The requests from your customers with the <u>highest priority</u> will be processed first.

5. Your Web portal contains an <u>electronic product catalog</u> to sell the item that you plan to sell.

6. You can disable your Web portal users by using the <u>Remove from Web portal</u> function.

7. The <u>notification process</u> assists in letting your customers know the status of their orders automatically by e-mail.

8. The catalogs that display your items on the Web portal are created and maintained in <u>Microsoft Commerce Server Catalog Management</u>.

Test Your Knowledge – Working with Reverse Auction (CH5)

1. All information about Web portal users is maintained on related <u>Contact Person card</u>s.

2. The <u>Reverse Auction Participant</u> field must be checked on the <u>Vendor</u> card in order to eligible for a reverse auction, in addition to a Web portal login ID and password.

3. A reverse auction is <u>when you put a demand for purchasing products to one or more vendors on the Web portal</u>

4. The winner of the auction is selected by running the <u>Select Vendor</u> function.

5. A <u>public</u> reverse auction results in an open reverse auction, where participating vendors are able to follow the auction progress.

Test Your Knowledge – Commerce Portal Architecture & Administration (CH6)

1. When you first install Commerce Portal, you have to <u>force synchronization</u> to initialize the SQL Server.

2. The messages that cannot be processed by Navision Commerce Portal synchronization end up in the <u>Error Message Queue</u>.

3. All synchronization from Navision to the SQL Server, except the <u>picture synchronization</u>, will be logged in the Message Log.

4. The <u>Navision Commerce Portal Synchronization service</u> monitors the Synch. Message queue and processes all the messages in it.

5. Synchronization between the Microsoft Navision database the SQL Server database is done through messages sent through <u>Microsoft Message Queuing (MSMQ).</u>

6. The Navision Application Server receives the job request messages from the <u>CPHandler</u>.

7. The status of Commerce Portal can be divided into two categories:
    <u>Sales related to Commerce Portal and Communication between SQL
    Server and Navision.</u>

8. Synchronization is triggered by the Microsoft Navision C/SIDE
    triggers <u>OnInsert, OnModify, OnRename and OnDelete</u>.

9. Data is stored in the <u>SynchMgt. Message Queue</u> table when you run
    the Force Synchronization batch job or when you modify data in a
    table that contains synchronization data.

10. The <u>CPHandler.dll</u> retrieves the messages from the Navision
    Application Server and places them in the private Synch. Message
    queue.

11. Commerce Portal is based on a four-tier model consisting of <u>a Web
    front, a communication layer, a Navision Application layer and a
    Microsoft Navision backend.</u>

12. One cause of trouble with the Navision Application Server may be
    that the CPHandler.dll is not <u>registered</u> properly.