

VIRTUAL NUGM 2023

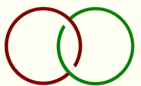
# TAILORING MANAGE 2000 WEB PORTALS

Linda McHenry, LJM Services with Peter Newby, Epicor

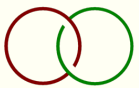
# Agenda

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1. Adding Custom Web Functions to Web Portals
2. Adding News Panel Articles to Web Portals
3. Enabling MSO Access in Manage 2000 Web Functions



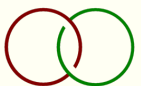
# Tailoring Web Menus



# Adding Custom Web Functions to Web Portals

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- Web portal menus are defined in MENU.BUILD
- Root web portal menus are defined DEFINE.WEB.LINKS
- Web portal functions are defined FN.BUILD
- Custom web inquiries can be built in REPORT.BUILD
- Note:
  - WelcomePortal Quick Links and the global menu ShortCuts are MENU.BUILD items attached to the user through the web preferences hierarchy.



# Portal Menus Are Just Menus

hp4 - pmn:LJM.TRAIN - Manage 2000 - Peter Newby

File Edit Commands Scripts Attachments Tools Help Debug

Attachments Add Attachment Add Note Notes Note Summary

MENU.BUILD - Build Menus "ADD" Mode

Menu Name LJM.CM.INQS

02 Custom Y 03 Sequence U **Viewer**

04 Module LJM LJM Services Customizations

05 Menu Title LJM Services Inquiries

06 WebLink Only Y

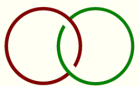
07 Command	08 Menu Name	09 Description
.01) LjmCustGroup		Customer Association Gro
.02) LjmCustGroups		Customer List by Associa
.03)		
.04)		
.05)		
.06)		
.07)		
.08)		
.09)		
.10)		

10 Filter Subroutine Name

10 Enter the Filter Subroutine Name, TOP .....

Entries 2

User pmn:LJM.TRAIN, PID 0460 on hp4 0 Ins



# Portal Menus Roots Are in DEFINE.WEB.LINKS

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File Edit Commands Scripts Attachments Tools ProcessOpts Help Debug

Attachments Add Attachment Add Note Notes Note Summary

Define Web Portal Links (197) "CHG" Mode

Name **CUSTOMER** Role **ALL** UpdateControl 1

03 Description Customer Portal 06 Custom Flag

04 Link Filter Sub 07 Single Level

05 Ok To Cache 08 Menu Location LOCAL

09 Menu Entries 5

.01)	Customer.General General Information
.02)	Customer.Sales Sales Inquiries
.03)	Customer.AR Accounts Receivable Inquiries
.04)	Customer.Service.Inquiries Service Inquiries
.05)	<b>LJM.CM.INQS LJM Services Inquiries</b>
.06)	
.07)	
.08)	
.09)	

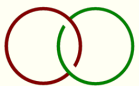
10 SeeAlso Menu AR.DOC AR Documentation

11 Portal Function CustomerPortal Customer Information

12 Base File Name CM Customer Master

Change Which Field, END, TOP, \P .....

User pmn:LJM.TRAIN, PID 0460 on hp4 0 Ins

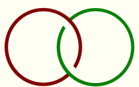


# LJM.CM.INQS Is Now Part of CustomerPortal

The screenshot shows the Epicor Manage 2000 Customer Portal. The browser address bar indicates the URL: vm-m2kweb.americas.epicor.net/LJM/ROIPortals/CustomerPortal/CustomerPortal.aspx?CustNbr=1024. The page header includes the Epicor logo and the word "Customer". A navigation menu contains links for Customer Information, SeeAlso, General Information, Sales Inquiries, Accounts Receivable Inquiries, Service Inquiries, and LJM Services Inquiries. A search bar shows "Customer Nbr" with the value "1024 SEARS SYSTEMS, INC" and a "Go" button. A dropdown menu is open, showing options for "Customer Association Group" and "Customer List by Association Group". Below the search bar is a "Summary" section with two columns of information: "Customer Information" and "Relationship Information".

Customer Information	
<b>Name</b>	Sears Systems, Inc
<b>Address</b>	600 Ford Road Suite 2000
<b>City, State Post</b>	Minneapolis, MN 55426-4913
<b>Country</b>	United States of America
<b>Phone</b>	612-595-0500
<b>800 Number</b>	800-595-9305
<b>Fax Number</b>	612-595-9450
<b>Contact Name</b>	Melanie Hubbard
<b>Major Customer</b>	

Relationship Information	
<b>Customer Since Date</b>	04/09/2023
<b>Customer Type</b>	RET Retail
<b>Class</b>	D
<b>Sales Person</b>	105 Jake Needles
<b>Territory</b>	4 Central
<b>Sales Rep</b>	102 James Martin Company



# The Secret to Passing Portal Key

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File Edit Commands Scripts Attachments Tools ProcessOpts Help Debug

Attachments Add Attachment Add Note Notes Note Summary

FN.BUILD - Pseudo Function Parameters "CHG" Mode

Function Name LjmCustGroup

Type W Web

Module LJM LJM Services Customizations

Description Customer Association Group

05 Web URL /MT/ReportBuildRpt/ReportBuildRpt.aspx

06 Web Target

07 Web Query Parameters	08 Web Query Values	Entries	3
.01) ReportLibrary REPORT.BUILD mod	LJM		
.02) ReportID REPORT.BUILD report I	LJM.CUST.GROUP		
.03) CustNbr Customer number	&KEY&		

09 Custom JavaScript Entries 0

.01)

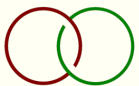
.02)

.03)

.04)

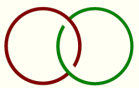
Change Which Field, END, TOP, \P .....

User pmn:LJM.TRAIN, PID 0460 on hp4 1 Ins





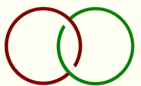
# Newsfeeds in Web Portals



# Adding News Panel Articles to Web Portals

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- Web portals have a hidden panel reserved for a newsfeed
- Create a feed in NEWS.FEEDS and attach articles
- Create your own articles in NEWS.ARTICLES.
- Attach the feed to the portal in DEFINE.PORTAL.VIEW



# Create a Feed in NEWS.FEEDS and Attach Articles

hp4 - pmn:LJM.TRAIN - Manage 2000 - Peter Newby

File Edit Commands Scripts Attachments Tools ProcessQpts Help Debug

Attachments Add Attachment Add Note Notes Note Summary

News Feed Maintenance "CHG" Mode

Id 000018

02 Description News Feed for LOOK.AR 03 Frequency 23:59:59

04 Comments Entries 1

.01) Tailored displays to add to CustomerPortal

.02)

05 Roles Entries 2 06 Contacts Entries 0

.01) DEVELOPER Web application developer .01)

.02) SYSUSER System User .02)

.03) .03)

07 Included Articles Entries 6

.01) STD\_CM\_03 Customer &LLK CM& Expiring Quotes

.02) STD\_CM\_04 Special Pricing Opportunities

.03) STD\_CM\_06 Sales Orders last 30 days

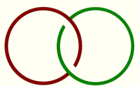
.04) STD\_CM\_07 Shipments last 30 days

.05) STD\_CM\_08 Shipments due next 30 days

.06) STD\_CM\_09 A/R Items Due next 30 days

Change Which Field, END, TOP, \P .....

User pmn:LJM.TRAIN, PID 0500 on hp4 0 Ins



# Create Your Own Articles in NEWS.ARTICLES

hp4 - pmn:LJM.TRAIN - Manage 2000 - Peter Newby

File Edit Commands Scripts Attachments Tools ProcessOpts Help Debug

Attachments Add Attachment Add Note Notes Note Summary

### News Article Maintenance "CHG" Mode

Id	000030	02 News Source	MSO
07 Desc	Graph AR Aging - Customer &LLK	03 ECA Id	
08 Title	&CAPTION&	04 Monitor	
09 Category	MSO Software Object Displays	05 MSO Id	516S Graph AR Aging -
		06 REST Id	

10 Summary (HTML) Entries 2

.01)	<pre style="white-space=pre">&MSO.DATA&</pre>	Edit
.02)	&GRAPH.IMAGE&	
.03)		
.04)		

Drill Back

11 Function

12 Document /ROIPortals/WelcomePortal/WelcomePortal.aspx

13 Feeds Entries 1

.01)	000018 News Feed for LOOK.AR
.02)	
.03)	
.04)	

14 Code Behind MSO.NEWS

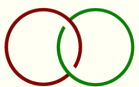
15 Parameters Entries 1

.01)	516S
.02)	

16 Publish on 17 Retire on

Change Which Field, END, TOP, \P .....

User pmn:LJM.TRAIN, PID 0500 on hp4



# Attach the Feed to the Portal in DEFINE.PORTAL.VIEW

hp4 - pmn:LJM.TRAIN - Manage 2000 - Peter Newby

File Edit Commands Scripts Attachments Tools ProcessQpts Help Debug

Attachments Add Attachment Add Note Notes Note Summary

Define Web Portal Views (267) "CHG" Mode

View Name  Role  03 Ctl

04 Description  05 Custom

06 File Name	07 Key Gen Sub	08 Dictionary
.01) CM Customer Master		Cust_Nbr... 33
.02)		
.03)		
.04)		
.05)		
.06)		
.07)		
.08)		

Entries 1

09 News Feed

10 News Item  Entries 0

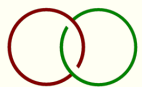
.01)

.02)

.03)

Change Which Field, END, TOP, \P .....

User pmn:LJM.TRAIN, PID 0500 on hp4 0 Ins



# LOOK.AR Now Displays Feed 000018

**EPICOR Manage 2000** Customer

Customer Information    General Information    Sales Inquiries    Accounts Receivable Inquiries    Service Inquiries    LJM Services Inquiries

Customer Nbr:

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**Summary**

**Customer Information**

Name: Sears Systems, Inc.  
 Address: 600 Ford Road, Suite 2000  
 City, State Post: Minneapolis, MN 55428-4913  
 Country: United States of America  
 Phone: 612-595-0500  
 800 Number: 800-595-9305  
 Fax Number: 612-595-9450  
 Contact Name: Melanie Hubbard  
 Major Customer

**Relationship Information**

Customer Since Date: 04/09/2023  
 Customer Type: RET Retail  
 Class: D  
 Sales Person: 105 Jake Needles  
 Territory: 4 Central  
 Sales Rep: 102 James Martin Company

**A/R Information**

Credit Status  
 Payment Terms: A 2% 10, 1% 20 Net 30  
 Last Year Sales: 329,186,010.87  
 YTD Sales: 4,166,911.53  
 AR Balance: 3,050,117.70  
 Minor Cust AR Balance

**Customer Location**

[+Recent Activity](#)    [+Chart](#)

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**News**

News Feed for LOOK.AR

**Last 30 Days Shipments - Cust 1024**

Sales Order Number	Shipment Number	Shipment Date	Ship Status	Shipment Date	Line Item	Extra Charge	Fee	Cus Code
8030	2	09-16-23	Shipped	10-16-23		4,800.00	10.00	01
8030	3	10-16-23	Allotted			938.00	0.00	01
8031	2	09-16-23	Allotted			366,892.87	0.00	01
8039	1	09-30-23	Allotted			2,531.76	0.00	01
8087	1	10-13-23	Consigned	10-13-23		64,348.64	0.00	01
8088	1	10-14-23	Consigned	10-14-23		10,769.98	0.00	01

**Last 30 Days Sales Orders - Cust 1024**

SO Nbr	SO Date	Order Total	Cus Code	Line Nbr	Item Number	Delivery Date	Delivery Quantity	Unit Price	Extended Price
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**Special Pricing Opportunities**

**AR Items Due Next 30 Days - 1024**

Invoice Number	Invoice Date	Invoice Amount	Cus Code	Due Date	Balance Due
9457	08-24-23	282038.48		09-10-23	94011.82
				10-10-23	94011.83
				11-10-23	94011.83
9458	08-24-23	219958.98		09-10-23	93318.65
				10-10-23	93318.65
				11-10-23	93318.65
9459	08-24-23	282092.23		09-10-23	94030.78
				10-10-23	94030.74
				11-10-23	94030.74
9461	08-24-23	351372.13		09-10-23	117124.09
				10-10-23	117124.04
				11-10-23	117124.04
9463	08-24-23	358422.93		09-10-23	118840.97
				10-10-23	118840.98
				11-10-23	118840.98

**Shipments Due Next 30 Days - Cust 1024**

Sales Order Number	Req Ship Date	Ln Item Number	Delivery Quantity	Line Item Total	Fee	Cus Code
8029	10-17-23	1 100101	10	20,828.00	01	
		2 102101	80	137,182.30	01	
		3 103101	18	30,467.89	01	
		4 104101	28	48,778.55	01	
		5 105101	4	622.94	01	
8030	10-16-23	6 248101	4	228.41	01	
		7 296101	8	314.14	01	
		2 102101	80	98,973.05	01	
		4 104101	28	55,000.00	01	
		5 105101	4	420.49	01	
8031	11-01-23	6 248101	4	184.18	01	
		7 296101	8	144.88	01	
		9 100101	1	2,000.00	01	
		1 100101	100	209,280.00	01	
		2 103101	10	20,448.26	01	
4 104101	30	58,834.24	01			

**Expiring Sales Quote Opportunities**

SO#	Expiration Date	Summary Information	Customer Ref Nbr
1018	12-01-23	Sales Quote 1018 Bill To: Sears Systems, Inc Ship To: Sears - Western Warehouse Status: Open Total: \$1234.11	12341
1016	12-01-23	Sales Quote 1016 Bill To: Sears Systems, Inc Ship To: Sears - Western Warehouse Status: Open Total: \$1826.99	12348

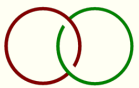
2 records listed

**Graph AR Aging - Customer 1024**

AR Aging for 1024 Soars Systems, Inc



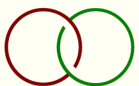
# Enabling MSOs in Web Functions



# Enabling MSO Access in Web Functions

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- MSOs can be enabled in web functions, globally, or by role, or by contact
- MSOs in web functions can NOT navigate to PWS functions
- In sp6 many MSOs are scoped, out of the box, to be available in Portals:
  - CustomerPortal 20 MSOs - 508S, 509S, 510S, 515S, 516S, 629S, 709S, 710S, 1108S...
  - ItemInfoPortal 8 MSOs - 705S, 707S, 880S, 1107S, 1144S, 1229S, 1238S, 1239S
  - StockStatusPortal 7 MSOs - 705S, 707S, 880S, 1107S, 1144S, 1238S, 1239S
  - MasterScheduler 8 MSOs - 705S, 707S, 880S, 1238S, 1239S, 1246S, 1253S, 1262S
  - PlannerScheduler 8 MSOs - 705S, 707S, 880S, 1238S, 1239S, 1246S, 1253S, 1262S
  - SoPortal 2 MSOs - 810S, 817S
  - SalesQuotePortal 2 MSOs - 550S, 1270S
  - PurchaseOrderPortal 2 MSOs - 1143S, 1271S
  - CasePortal 15 MSOs - 531S, 533S, 589S, 605S, 607S, 612S, 633S, 712S...,
  - VendorPortal 5 MSOs - 567S, 615S, 639S, 1111S
- Change MSO scope in MSO.BUILD screen 2





# Enabling MSOs Globally in Web Functions

hp4 - pmn:LJM.TRAIN - Manage 2000 - Peter Newby

File Edit Commands Scripts Attachments Tools ProcessOpts Help Debug

Attachments Add Attachment Add Note Notes Note Summary

**WEB.CONSTANTS.3 - Default Preference Settings** "CHG" Mode

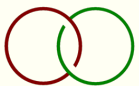
01 Preference Code	02 Sect	03 Value	Entries
.01) 1 Ext Home Page (Log	1 Globa	../MT/Login/Login.aspx	
.02) 3 Default Facility	1 Globa	01 Epicor Industries	
.03) 4 Items Per Page	1 Globa	25	
.04) 18 Web Server Path	1 Globa	06 LJM site on vm-m2kweb	
.05) 22 Mobile Style Shee	1 Globa	IPhone	
.06) 27 Mobile Theme	1 Globa	a	
.07) <b>38 Enable MSO</b>	1 Globa	<b>Y</b>	
.08)			
.09)			
.10)			

04 Allow User Settings

SYSUSER		NON-SYSUSER	
05 Shortcut Menu	<input type="text" value="INTRANET IntraNet Access"/>	06	<input type="text" value="INTERNET Internet Access"/>
07 SiteMap Menu	<input type="text" value="INTRANET IntraNet Access"/>	08	<input type="text" value="INTERNET Internet Access"/>

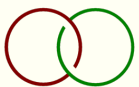
Change Which Field, END, TOP, \P .....

User pmn:LJM.TRAIN, PID 0500 on hp4 0 Ins



# LOOK.AR Now Has an Attachment Icon Menu

The screenshot displays the EPICOR Manage 2000 Customer interface. At the top, the EPICOR logo and 'Manage 2000' are on the left, and 'Customer' is centered. Below this, a navigation bar includes links for 'Customer Information', 'SeeAlso', 'General Information', 'Sales Inquiries', 'Accounts Receivable Inquiries', 'Service Inquiries', and 'LJM Services Inquiries'. The main content area shows the 'Customer Nbr' as '1024 SEARS SYSTEMS, INC' with a search icon and a paperclip icon. A dropdown menu is open, listing various options: '+ Related MSOs', '+ Quick Displays', '+ Graphs and Charts', '+ Web Functions', '+ Resoures from other sites', '+ Documentation', and a list of fields: 'City, State Post', 'Country', 'Phone', '800 Number', 'Fax Number', 'Contact Name' (with 'Melanie Hubbard' as a link), and 'Major Customer'. The 'Customer 1024 Contact Listing' sub-menu is expanded, showing items like 'Customer 1024 Last 5 Orders', 'Customer 1024 Information', 'Last 30 Days Sales Orders-Cust 1024', 'Shipments Due Next 30 Days-Cust 1024', 'Expiring Sales Quote Opportunities', 'Special Pricing Opportunities', 'Deposits Received From 1024', 'Last 30 Days Shipments - Cust 1024', 'AR Items Due Next 30 Days - 1024', and 'Cust 1024 Case History'. To the right, there are two information panels: 'Relationship Information' and 'A/R Information'. The 'Relationship Information' panel includes fields for 'Customer Since Date' (04/09/2023), 'Customer Type' (RET Retail), 'Class' (D), 'Sales Person' (105 Jake Needles), 'Territory' (4 Central), and 'Sales Rep' (102 James Martin Company). The 'A/R Information' panel includes 'Credit Status', 'Payment Terms' (A 2% 10, 1% 20 Net 30), 'Last Year Sales' (329,186,010.87), 'YTD Sales' (4,166,911.53), 'AR Balance' (3,050,117.70), and 'Minor Cust AR Balance'. At the bottom left, there are buttons for '+Recent Activity' and '+Chart'.



# Quick Display Example

EPICOR® Manage 2000® Customer

Customer Information See Also General Information Sales Inquiries Accounts Receivable Inquiries Service Inquiries LJM Services Inquiries

Customer Nbr 1024 1108S: Customer 1024 Contact Listing

+ Related MSOs

Go

Summary

Customer Information

Name

Address  
600 Ford Road  
Suite 2000

City, State Post

Country

Phone

800 Number

Fax Number

Contact Name

Major Customer

+ Recent Activity

News

News Feed for

Last 30 Days

Sales Order Number	Ship Number	Ship Date	Status	Amount	Cur	Due Date
5030						
5030						
5031	2	09-18-23	Allocated	385,852.07	U.00	01
5053	1	09-30-23	Allocated	2,531.76	0.00	01
5057	1	10-13-23	Consigned	64,345.64	0.00	01
5058	1	10-14-23	Consigned	10,768.98	0.00	01

5 records listed

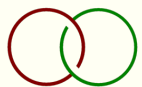
AR Items Due Next 30 Days - 1024

Invoice Number	Invoice Date	Invoice Amount	Cur Code	Due Date	Balance Due
5030	10-17-23				

Shipments Due Next 30 Days-Cust 1024

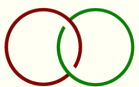
Delivery Quantity	Line Item Total	Fac Code	Cur Code
10	20,035.00		01

Close



# Navigation Shortcuts under 'Web Functions'

The screenshot displays the EPICOR Manage 2000 Customer interface. At the top, the EPICOR logo and 'Manage 2000' are on the left, and 'Customer' is centered. Below this is a navigation bar with links: Customer Information, SeeAlso, General Information, Sales Inquiries, Accounts Receivable Inquiries, Service Inquiries, and LJM Services Inquiries. A search bar contains '1024 SEARS SYSTEMS, INC'. A dropdown menu is open under '+ Web Functions', listing 'Open AR Items for Customer 1024', 'Sales Order Inquiry for 1024', and 'Sales Quote Inquiry for 1024'. To the right, there are three summary boxes: 'Relationship Information' (Customer Since Date: 04/09/2023, Customer Type: RET Retail, Class: D, Sales Person: 105 Jake Needles, Territory: 4 Central, Sales Rep: 102 James Martin Company), 'A/R Information' (Credit Status, Payment Terms: A 2% 10, 1% 20 Net 30, Last Year Sales: 329,186,010.87, YTD Sales: 4,166,911.53, AR Balance: 3,050,117.70, Minor Cust AR Balance), and a 'Major Customer' section with contact details (City: Minneapolis, MN 55426-4913, Country: United States of America, Phone: 612-595-0500, 800 Number: 800-595-9305, Fax Number: 612-595-9450, Contact Name: Melanie Hubbard). At the bottom, there are buttons for '+Recent Activity' and '+Chart'.





Thank you!

VIRTUAL NUGM 2023

