

9 CART STATUS RELATIONSHIPS

After defining statuses, the administrator needs to define the actions that will change quote/order status. For example, a desired behavior may be to change quote status from Open to Quoted if a user clicks on Generate Quote button.

The relationships between statuses and actions are specified through Cart Status Relations Definitions section of WebSource administration which is shown in Figure 9-1. This section is invoked by clicking on the Cart Status Relations link.

On the left, we have pre-action statuses, while on the top we have post-action status. List of actions in each square specify which actions will change the status listed all the way on the left side to the status listed all the way on the top. For example, the figure below states that if a user clicks on Generate Quote while the quote Open, the quote status will be changed to Quoted. It can also be seen that if a user clicks on Place Order button while in the status Quoted, the status will be changed to Order Placed.

In addition to specifying which actions are available for each status and which status will result from a certain action, this page is also used to define which user group can perform each action. Example below states that user group Customer can perform action "View"

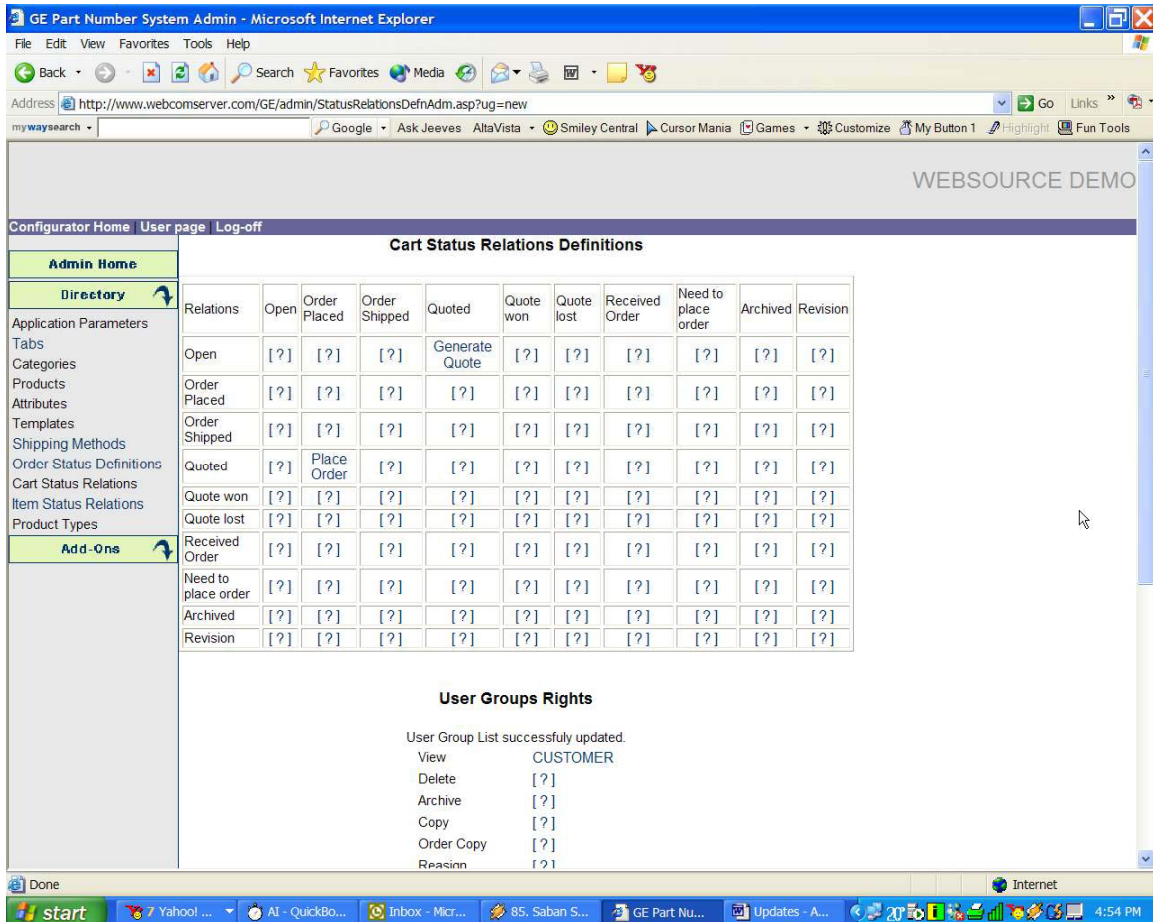


Figure 9-1 Cart Status Relations Definitions

The actual process of specifying an action is performed by clicking on the corresponding square. After clicking on the pre/post action square "Open/Open", a screen that looks like the Figure 9-2 is displayed.

In this example, “the “Quote” status will not change when performing “View” action, “Edit” action, “New Revision” action, “Add Item” action, “Calculate Multiplier” action, “Calculate” action, or “Save Quote” the Start Status and End Status are both Open as indicated by all of them being selected (highlighted).

If it is desired that all the items in the quote need to be reconfigured (be configured using the current product rules and prices instead of the rules and prices as it were when the quote was generated), then the “Check for Automatic Reconfiguration” check box should be selected for the corresponding action.

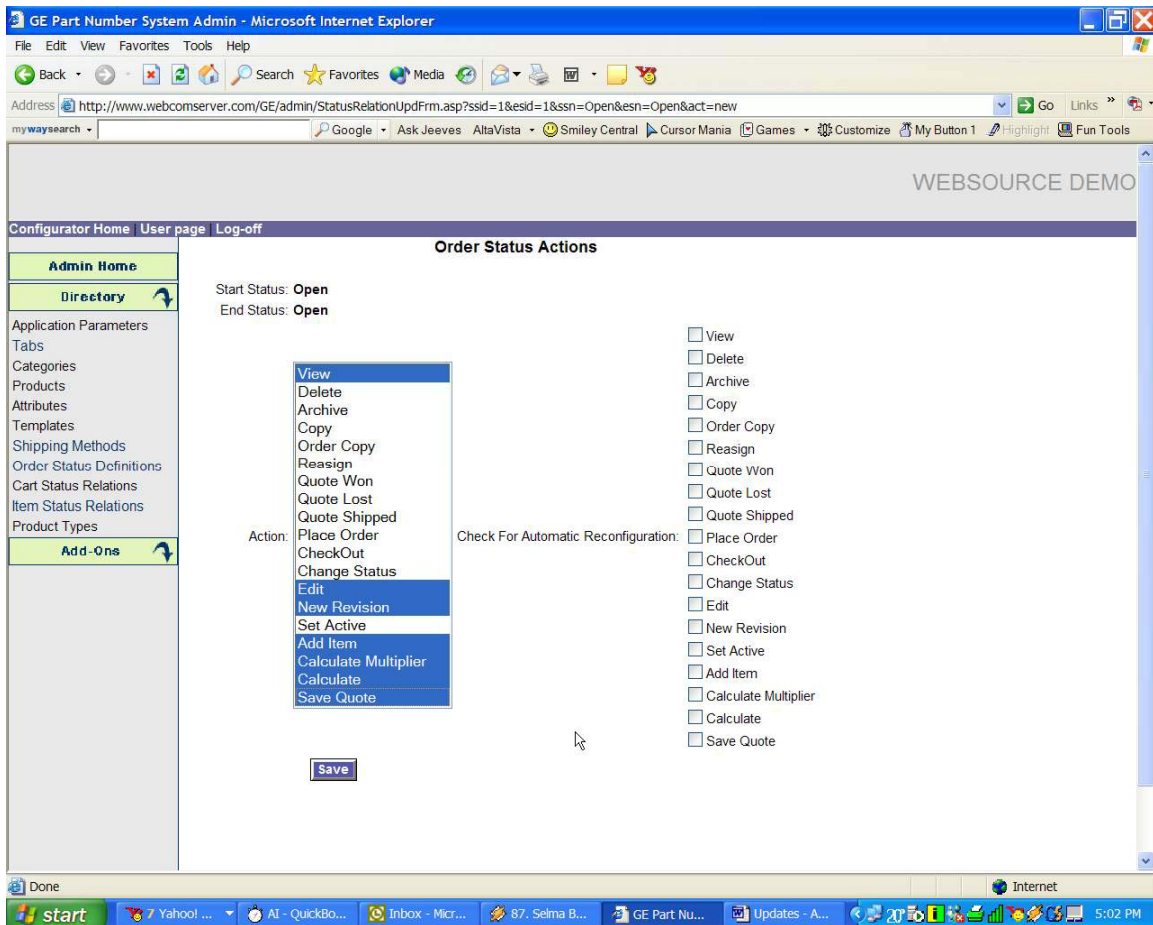


Figure 9-2 Order Status Actions