

CART VISIBILITY RULES

Selecting the "Quote/Cart Visibility" link under the "Quotation/Projects" drop down will bring up the "Cart Visibility Administration" screen shown in Figure 41-1.

Group	User	Company	Condition
Channel Rep	Catherine Jones		1

Total number of items in this view: 2. Page 1 of 1

Figure 41-1 - Cart Visibility Administration

By default, a user can only see quotes (aka carts or shopping carts or orders) that they have created. In order to allow a user to see any other quotes, a rule for cart visibility needs to be written. To add a new Rule, click the “**Add New**” link. The Cart Visibility Administration screen lists the parameters which a rule can be built. The order in which each choice is displayed reflects its rank from Left to Right. (See chapter 38 for more details on priorities and ranking.)

Cart visibility rules have two parts. One part specifies who (which users) the rule applies to and the second part specifies the actual condition. If the condition is met (true) than those users can see the quote. It is only possible to create 1 rule per combination of User Type (User Group), Employee (User) and Company.

For example, In Figure 41-2 we see a rule that applies to a user group called Direct Sales. The rule states that anyone who is a member of Direct Sales user group will see all quotes.

For the simplicity purposes, the condition in this example is set to 1.

Cart Visibility Administration ■ = required field

User Type : Channel Rep, CUSTOMER, **Direct Sales**, Sales Management

Employee : Catherine Jones, clarence, Dusan, Holly Cook

Company : Amazon Distribution Inc, Co_Name, Eastcoast Distribution Inc, GMS

Condition : 1

Assist **SAVE**

Figure 41-2 Cart Visibility

The Condition field can use anything that evaluates to 1 or 0. If the condition evaluates to 1 (True), the users specified in the rule can see those quotes. If a condition evaluates to 0 (False), the users specified in this rule can not see those quotes. Complex expressions using CPQ tags can be used in the condition. A complete explanation of expressions and list of tags can be found in Ch. 22, Tags and Expressions. **Note:** Only **CART** tags can be used in Condition field for Cart Visibility.

All companies have unique environments but there are some commonalities which we will use for quote visibility rule examples.

Examples of Cart Visibility Rules

Companies can have many different ways of distributing products and services and hierarchal structures to manage them.

For example, If the Sales Management Group requires the need to see all quotes on all of its groups or salespeople, (this may be individual users, Value-added Resellers, Wholesale Distributors, Outside Sales Reps ect....) how would this be set up?

Let's organize a hypothetical Virtual Inc.

Different departments and channels are used to sell products and services. All of these need access to the Configurator, so we will set up several quote sharing rules in order to specify who can or can not see quotes which are generated.

Virtual Inc. will have:

Sales Management: The internal management staff which needs access to all Quotes.

Sales Rep: The internal sales rep staff which work in territories or specific companies.

Channel Rep: The Channel Reps who are wholesalers, VARs, Distributors (external to Virtual Inc)

Direct Sales: Direct Sales are call center sales personnel, customer service ect.

So in this Example, Virtual Inc. would like to have only one user group for the sales people, which would be divided into 2 territories, East and West. The Channel Rep group has 4 major stocking wholesalers (2 in each territory) with 5 Value-added resellers assigned to each.

So based on this hierarchy will create certain Cart visibility rules:

Rule 1: Sale Management will have access to ALL Quotes: Figure 41-3

Cart Visibility Administration ☐ = required field

User Type : Channel Rep CUSTOMER Direct Sales Sales Management	Employee : Catherine Jones clarence Dusan Holly Cook	Company : Co_Name GMS Real inc WebSoft inc
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Condition :

1

Assist **SAVE**

Figure 41-3 Sales Management Rule

The way this rule works is very simple. It only applies to users that belong to a user group called Sales Management. When a user from this group logs in the software evaluates the above condition against every quote. Since the condition is equal to 1, which means true, these users will be able to see all quotes.

Rule 2: The Sales Rep group should see only quotes within their territory. Jerry Spinger is assigned to East; Opah Windfree is assigned to West. In order to make sure each rep can only see quotes that belong in their respective territory we create a rule using the <*SAMETERRITORY*> tag. Figure 41-4

Cart Visibility Administration ☐ = required field

User Type : Channel Rep CUSTOMER Direct Sales Sales Management SALES REP.	Employee : Catherine Jones clarence Dusan Holly Cook	Company : Co_Name GMS Real inc WebSoft inc
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Condition :

<*SAMETERRITORY*>

Assist **SAVE**

Figure 41-4 Sales Rep Rule

Now every Sales Rep will be able to see all quotes located within their respective territory. Based on this rule Jerry Spinger will not be able to see Opah Windfree's quotes, because in there User profile they are in different territories. Figure 41-5 illustrates territory association for these two users. For more info on user admin, refer to User Administration.

The way this rule works is very simple as well. When a user from a group Sales Rep. logs in, the software goes through every single quote in the software and evaluates the tag <*SAMETERRITORY*>. This tag evaluates to 1 (true) if a user who created a quote (quote owner) has the same territory as the logged in user. All such quotes will be visible to a logged in user.

Figure 41-5 User Admin – Territory Selection

Rule 3: Channel Reps can see only those quotes they have generated and all quotes created by their own distributor companies. The Channel Rep Wholesalers Inc, who supplies Westcoast Distribution Inc. and Eastcoast Distribution Inc., needs to view all quotes generated between those 2 distributor companies. Figure 41-6

In this case the condition is a bit more complicated and it requires an expression. :

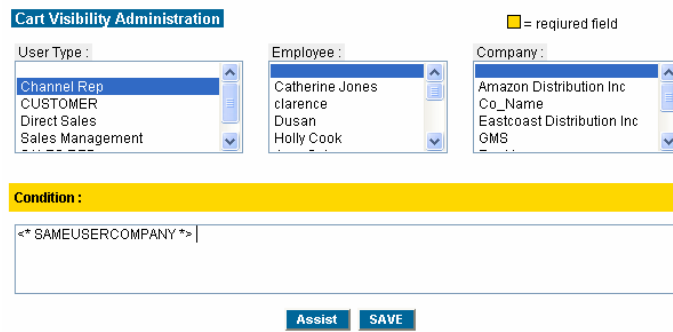
Note: Expressions cannot contain spaces. Unless they are inbetween
 [OR]([EQ](<*CO_INFO(COMPANY_NAME)*>,Eastcoast Distribution Inc),
 [EQ](<*CO_INFO(COMPANY_NAME)*>,Westcoast Distribution Inc))

Figure 41-6 Channel Rep Distributor Rule

The way the above rule works is also very simple. When a user from a company Distributors, Inc. logs in, the software goes through every quote and evaluates whether or not a user who created that quote belongs to a company Eastcoast Distributors or Westcoast Distributors. For every quote whose owner works for any one of these two companies, the condition evaluates to true and the logged in user can see those quotes.

Rule4: By default each employee of each company (Westcoast, Eastcoast) can only see their own quotes. But in order to allow each user to see quotes from their own company we need the following rule. Figure 41-7

We would use this condition to control this: <* SAMEUSERCOMPANY *>



Cart Visibility Administration ☐ = required field

User Type : Channel Rep
CUSTOMER
Direct Sales
Sales Management

Employee : Catherine Jones
clarence
Dusan
Holly Cook

Company : Amazon Distribution Inc
Co_Name
Eastcoast Distribution Inc
GMS

Condition :

<* SAMEUSERCOMPANY *>

Assist SAVE

Figure 41-7 Channel Rep Rule

The way the above rule works is also very simple. When a user from Channel Rep groups logs in the software goes through each quote and evaluates the <*SAMECOMPANY*> tag. For all quotes where the quote owner works for the same company as the logged in user, this tag will evaluate to true, and the logged in user will be able to see those quotes.

For explanations of various other tags and expressions please see Chapter 22, Tags and Expressions.

Depending on the complexity of the distribution network, it is possible to create many rules. To search for a particular rule an administrator can enter full or partial string for a Group, User, Company or Condition and click on S (short for search). If you are unsure of the exact spelling you can use the first initial to broaden your search. Figure 41-8

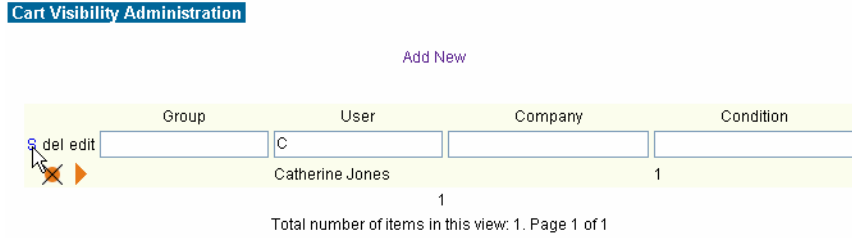


Figure 41-8 Rules Search - User

The relationship between each box (Group, user, Company, Condition) is AND. This means that both conditions must be true in order to find a match. For example, If we were looking for Mike from ABC Company, and used 'Mike' as the User and XYZ by mistake as the company search parameters I would see no matches. This is because both conditions have not been met. If I would leave the Company field blank then I would see ALL Mikes. Figure 41-9

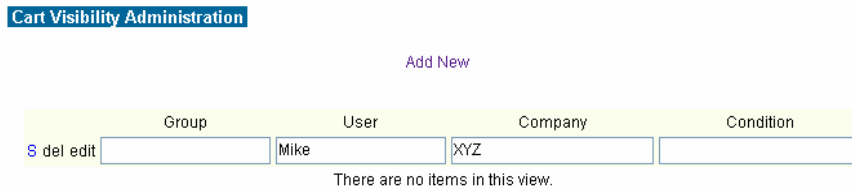


Figure 41-9 Rules Search – User and Company

To delete a rule from the list click on the del link adjacent to the rule you would like to delete. You will get a confirmation message before it is deleted. Figure 41-10

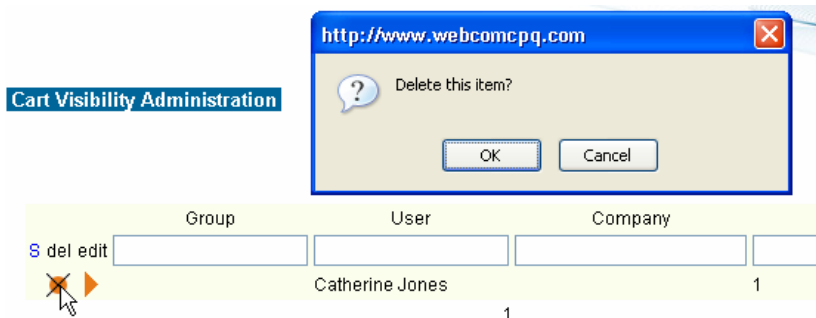


Figure 41-10 Deleting a Rule