

## PRIORITIES

Priorities in Configurator set the choices available in **Global Parameters** > *Discounting Rules* and **Quotation/Projects** > *Quote / Cart Visibility, Total Amount Limit and Customer Visibility*. The Ranking sets the order in which each are executed, with ranking 1 being the highest priority. Setting Ranking to 0 is equivalent to disabling the section.

Labels can also be changed for each of the different sections. Sections are User, User Group, Company, Category, Product and Product Type.

**Note: Priorities are defined on the Global Level, for all categories and products and can not be defined for the particular category or product.**

Selecting the “Priorities” menu expands the “Priorities” drop down as shown in Figure 38-1.



There are 6 types of Priorities:

- **Max Quote/Cart Amount**
- **Quote/Cart Visibility**
- **Private Cust. Visibility**
- **Global Cust. Visibility**
- **Quote/Cart Headings**
- **Discounting**

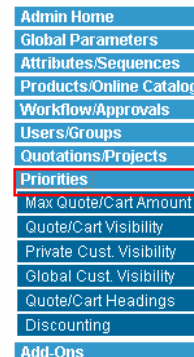
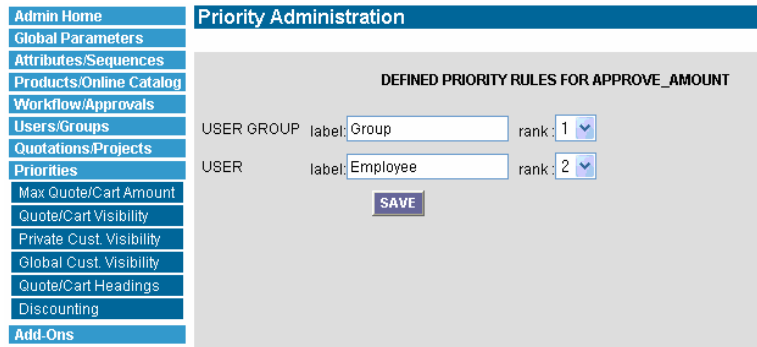


Figure 38-1 Priorities Drop Down menu

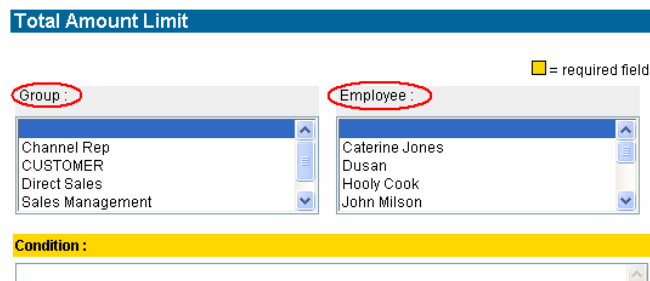
## Max Quote/Cart Amount

Max Quote/Cart Amount Priority Administration is shown in Figure 38-2. It defines priority rules for **Quotation/Projects** > *Total Amount Limit*.



The screenshot shows a web application interface for "Priority Administration". On the left is a navigation menu with items like "Admin Home", "Global Parameters", "Attributes/Sequences", "Products/Online Catalog", "Workflow/Approvals", "Users/Groups", "Quotations/Projects", "Priorities", "Max Quote/Cart Amount", "Quote/Cart Visibility", "Private Cust. Visibility", "Global Cust. Visibility", "Quote/Cart Headings", "Discounting", and "Add-Ons". The main content area is titled "DEFINED PRIORITY RULES FOR APPROVE\_AMOUNT". It contains two rows of configuration: "USER GROUP" with label "Group" and rank "1", and "USER" with label "Employee" and rank "2". A "SAVE" button is located below the second row.

Figure 38-2 - Max Quote/Cart Amount Priority Administration

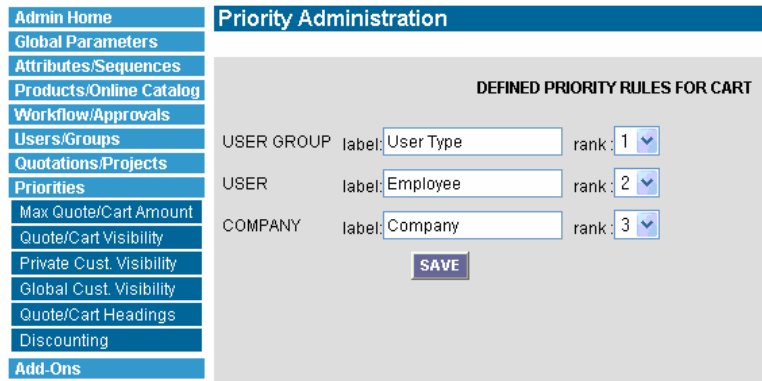


The screenshot shows the "Total Amount Limit" configuration interface. It features two dropdown menus: "Group" and "Employee". The "Group" dropdown lists "Channel Rep", "CUSTOMER", "Direct Sales", and "Sales Management". The "Employee" dropdown lists "Caterine Jones", "Dusan", "Hooly Cook", and "John Millson". A legend indicates that a yellow square represents a required field. Below the dropdowns is a "Condition" field, which is highlighted in yellow, indicating it is a required field.

Quotation/Projects > Total Amount Limit (Group and Employee shown)

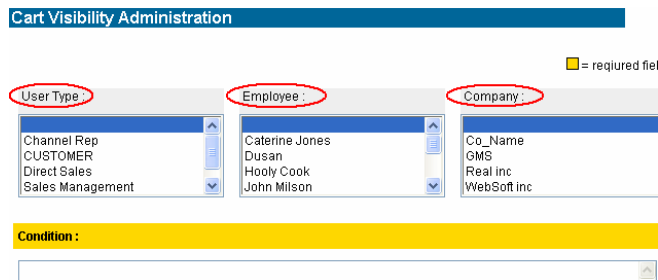
## Quote/Cart Visibility

Quote/Cart Visibility Priority Administration is shown in Figure 38-3.  
 It defines priority rules for **Quotation/Projects** > *Quote / Cart Visibility*.



Admin Home	Priority Administration
Global Parameters	<p style="text-align: center;"><b>DEFINED PRIORITY RULES FOR CART</b></p> <p>USER GROUP label: <input type="text" value="User Type"/> rank: 1</p> <p>USER label: <input type="text" value="Employee"/> rank: 2</p> <p>COMPANY label: <input type="text" value="Company"/> rank: 3</p> <p style="text-align: center;"><input type="button" value="SAVE"/></p>
Attributes/Sequences	
Products/Online Catalog	
Workflow/Approvals	
Users/Groups	
Quotations/Projects	
Priorities	
Max Quote/Cart Amount	
Quote/Cart Visibility	
Private Cust. Visibility	
Global Cust. Visibility	
Quote/Cart Headings	
Discounting	
Add-Ons	

Figure 38-3 - Quote/Cart Visibility Priority Administration

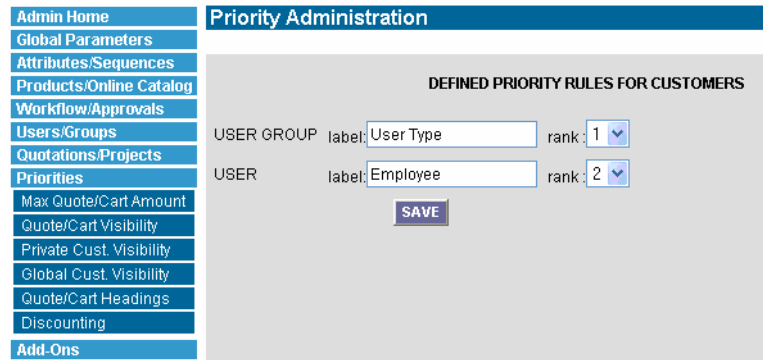


■ = required field

User Type	Employee	Company
Channel Rep CUSTOMER Direct Sales Sales Management	Caterine Jones Dusan Hooly Cook John Milson	Co_Name GMS Real Inc WebSoft inc
<p><b>Condition :</b></p>		

## Private Cust. Visibility

Private Cust. Visibility Priority Administration is shown in Figure 38-4.  
 It defines priority rules for **Quotation/Projects** > *Customer Visibility* > *Local Customers*.

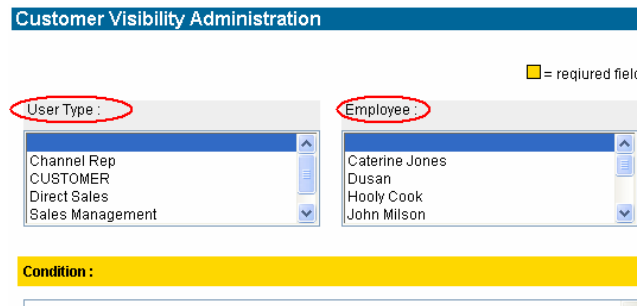


The screenshot shows a web application interface for "Priority Administration". On the left is a navigation menu with items like "Admin Home", "Global Parameters", "Attributes/Sequences", "Products/Online Catalog", "Workflow/Approvals", "Users/Groups", "Quotations/Projects", "Priorities", "Max Quote/Cart Amount", "Quote/Cart Visibility", "Private Cust. Visibility", "Global Cust. Visibility", "Quote/Cart Headings", "Discounting", and "Add-Ons". The main content area is titled "DEFINED PRIORITY RULES FOR CUSTOMERS" and contains two rows of configuration:

USER GROUP	label:	rank:
	User Type	1
USER	Employee	2

Below the table is a "SAVE" button.

Figure 38-4 - Private Cust. Visibility Priority Administration



The screenshot shows the "Customer Visibility Administration" interface. At the top right, a legend indicates that a yellow square represents a "required field". Below this, there are two dropdown menus: "User Type" and "Employee". The "User Type" dropdown is circled in red and contains the following options: Channel Rep, CUSTOMER, Direct Sales, and Sales Management. The "Employee" dropdown is also circled in red and contains the following options: Catherine Jones, Dusan, Hooly Cook, and John Milson. Below the dropdowns is a yellow bar labeled "Condition:".

## Global Cust. Visibility

Global Cust. Visibility Priority Administration is shown in Figure 38-5. It defines priority rules for **Quotation/Projects** > *Customer Visibility* > *Global Customers*.

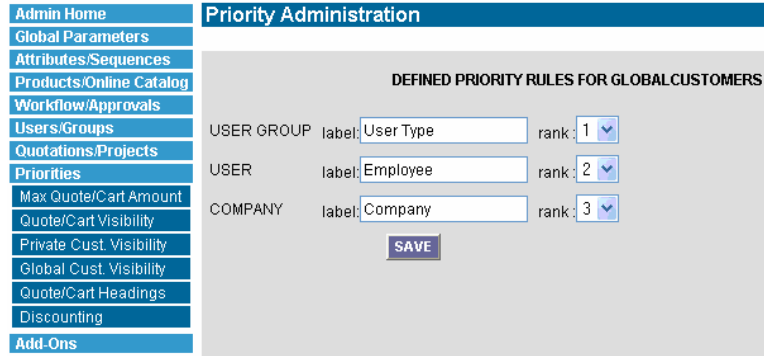
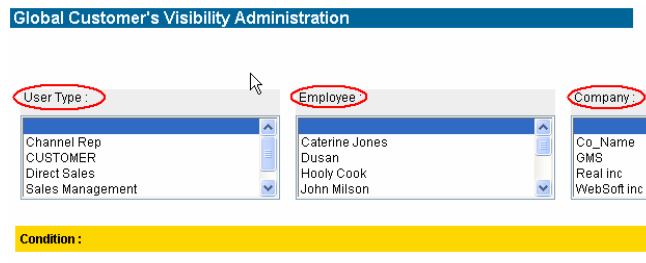


Figure 38-5 - Global Cust. Visibility Priority Administration



## Quote/Cart Headings

Quote/Cart Headings Priority Administration is shown in Figure 38-6. It defines Priority Rules for Load Quote.

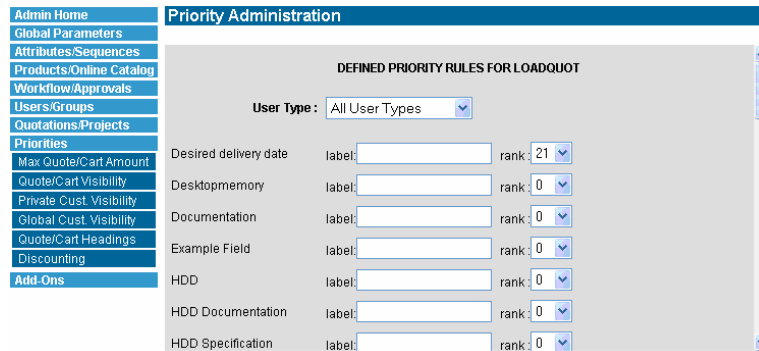


Figure 38-6 - Quote/Cart Headings Priority Administration

