

USER GROUPS ADMINISTRATION

User Groups is a powerful feature that controls how a user interacts with the system. Products, Reports, Workflow Actions, and more can be accessible according to User Group. This allows users to be easily divided so that privileges can be provided or denied to certain users.

Adding a new User Group is easy. Select the **User Groups** link under the **User/Groups** drop down menu as shown in Figure 52-1.



User Groups Administration

Add New

Type Name	Type Description	Start URL	XSLT File	Start Category	Allow incomplete config
copy del edit					
▶ ✕ ▶ CUSTOMER	Authorized customer				False
▶ ✕ ▶ SALES REP.	Sales representative		defaultcartNew.xml		True
▶ ✕ ▶ Student	Websource students		defaultcartNew.xml		True

1
Total number of items in this view: 3. Page 1 of 1

Figure 52-1 – User Groups Administration

Existing User Groups can be **copied**, **deleted**, or **edited** by clicking the respective symbol to the left of the User Group Name. Click **Add New** at the top of the screen to add a new User Group.

User Groups Administration

Group name :	<input type="text"/>
Description :	<input type="text"/>
Start Page :	<input type="text"/>
Start Category :	Not Specified <input type="button" value="v"/> <input type="button" value="CLEAR"/>

Figure 54-2 - User Group Administration page

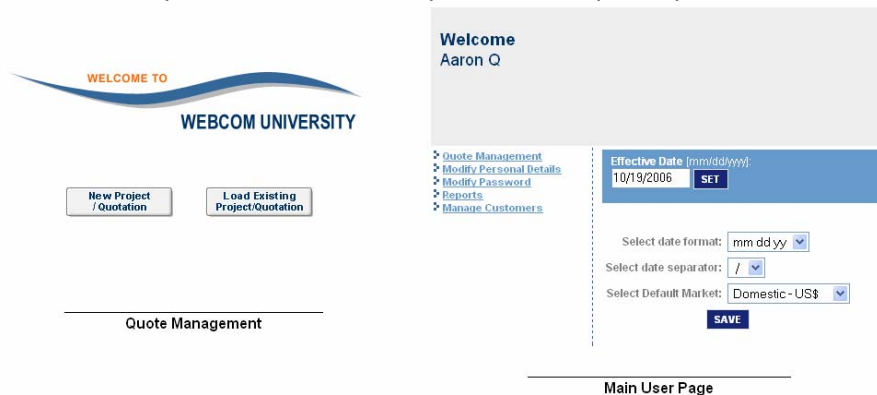
Figure 52-2 shows the top part of the screen displayed when creating or editing a group. **Group Name** is the only required field when creating a User Group. Users will not see this group name. This is only available to Administrator Users.

The following fields are optional when creating a User Group. A few fields become necessary to fill because of their importance to CPQ functionality. For instance, a Shopping Cart must be chosen for a group before anyone in that group can create a quotation.

Description – Used for a more in-depth description of the group that the Group Name cannot provide.

Start Page – This is the home page users in this group will see when they first log in. If left empty, users will see the default home page, which is the quote management page. The main user page can also be displayed as the home page. This page allows users to execute any privileges assigned to them, such as user management. It also allows them to change personal information, change their password, view reports, and carry out other tasks. See Chapter 37 for more information.

NOTE: Links must be given as relative links, such as quotation/loadquot.asp and NOT absolute, such as http://www.domain.com/quotation/loadquot.asp.



Start Category – Defines the category the user will start out in when they click the New Quote link. Clicking the drop down button brings up a pop-up window where the category can be chosen.

Visual Style (Shopping Cart/Quote) :	<input type="text"/>	<input type="button" value="upload"/>	<input type="button" value="download"/>	<input type="button" value="delete"/>
Visual Style (Asset) :	<input type="text"/>	<input type="button" value="upload"/>	<input type="button" value="download"/>	<input type="button" value="delete"/>
Visual Style (Checkout) :	<input type="text"/>	<input type="button" value="upload"/>	<input type="button" value="download"/>	<input type="button" value="delete"/>
Visual Style (Place Order) :	<input type="text"/>	<input type="button" value="upload"/>	<input type="button" value="download"/>	<input type="button" value="delete"/>
Visual Style (Loadquot) :	<input type="text"/>	<input type="button" value="upload"/>	<input type="button" value="download"/>	<input type="button" value="delete"/>
Visual Style (Waiting For Approval) :	<input type="text"/>	<input type="button" value="upload"/>	<input type="button" value="download"/>	<input type="button" value="delete"/>
Visual Style (Other Quotes) :	<input type="text"/>	<input type="button" value="upload"/>	<input type="button" value="download"/>	<input type="button" value="delete"/>
Visual Style (Preview Quote) :	<input type="text"/>	<input type="button" value="upload"/>	<input type="button" value="download"/>	<input type="button" value="delete"/>
Visual Style (Preview Asset) :	<input type="text"/>	<input type="button" value="upload"/>	<input type="button" value="download"/>	<input type="button" value="delete"/>

Figure 52-4 – User Group Administration page

Figure 52-4 shows the Visual Style options available on the User Group Administration page. Each Visual Style section can be assigned a different page. Each page may emphasize certain information, allow addition of information, or may just have a completely different look and feel.

Specially tailored pages for a company's needs can be uploaded by clicking the **Upload** button. Pages can be downloaded for editing by clicking the **Download** button. Selecting a page from the drop down list and clicking the **Delete** button removes the page from the system.

Shopping Cart/Quote – Determines the page displayed when a user creates a new quote.

NOTE: For more information on Shopping Carts and the differences in the pre-installed styles, see Chapter 50.

Asset – This page is displayed when the Edit action is performed on an Asset

Checkout – This is the screen displayed when a user is going through the final checkout procedures.

Place Order – This screen is shown just before checkout and gives a summary of the order.

Loadquote, Waiting for Approval, and Other Quotes – These three settings refer to the three tabs displayed on the Existing Quotes page for a user. Loadquote will be displayed when the user is looking at the My Quotes tab. The Waiting for Approval and Other Quotes pages will be displayed when those tabs are selected.

Preview Quote and Preview Asset – These two pages will be displayed when the Preview action is selected for that item in the Existing Quotes/View Assets page.

NOTE: The Preview action must be allowed for this group in order for it to be used. See Chapter 9.

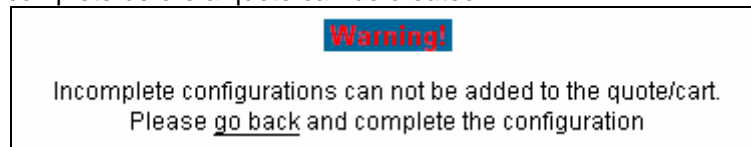
Show Search on Loadquote Pages:	<input checked="" type="checkbox"/>
Customer Required:	<input type="checkbox"/>
Allow storing of incomplete configurations :	<input type="checkbox"/>
Allow search for CRM Accounts and Contacts on Customer pages :	<input checked="" type="checkbox"/>

Figure 52-5 – User Group Administration page

Show Search on Loadquote Pages – Determines whether or not the Advanced Search feature is available on the Existing Quotes page.

Customer Required – CPQ has two workflows: a user can login and configure a product then add it to a Cart/Quote, or when a user logs in is taken directly to a blank Cart/Quote. This option determines the workflow. When selected, the user is taken directly to an empty Cart/Quote. There they can enter customer information. A product can then be configured when the **Add Item** button is clicked.

Allow Storing of Incomplete Configurations – This determines whether or not a user will be able to create a quote from a configuration labeled as Incomplete. If unchecked then a message will be displayed telling the user that the configuration is incomplete and needs to be complete before a quote can be created.



Allow Search for CRM Accounts and Contacts on Customer Pages – This determines whether or not any CRM information is searchable on the customer pages.