JD Edwards EnterpriseOne Applications

Customer Self Service Implementation Guide

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Preface

Welcome to the JD Edwards EnterpriseOne Applications Customer Self-Service Implementation Guide.

Audience

This guide is intended for implementers and end users of the JD Edwards EnterpriseOne Customer Self-Service system.

JD Edwards EnterpriseOne Products

This implementation guide refers to these JD Edwards EnterpriseOne products from Oracle:

- JD Edwards EnterpriseOne Sales Order Management
- JD Edwards EnterpriseOne Inventory Management
- JD Edwards EnterpriseOne Transportation Management
- JD Edwards EnterpriseOne Forecast Management
- JD Edwards EnterpriseOne Service Management
- JD Edwards EnterpriseOne Case Management
- JD Edwards EnterpriseOne Solution Advisor

JD Edwards EnterpriseOne Application Fundamentals

Additional, essential information describing setup and design of the system appears in the companion volumes of documentation called *JD Edwards EnterpriseOne CRM Application Fundamentals 9.0 Implementation Guide* and *JD Edwards EnterpriseOne Inventory Management 9.0 Implementation Guide.*

Customers must conform to the supported platforms for the release as detailed in the JD Edwards EnterpriseOne minimum technical requirements. In addition, JD Edwards EnterpriseOne may integrate, interface, or work in conjunction with other Oracle products. Refer to the cross-reference material in the Program Documentation at `http://oracle.com/contracts/index.html` for Program prerequisites and version cross-reference documents to assure compatibility of various Oracle products.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

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Related Documents

You can access related documents from the JD Edwards EnterpriseOne Release Documentation Overview pages on My Oracle Support. Access the main documentation overview page by searching for the document ID, which is 1308615.1, or by using this link:

https://support.oracle.com/CSP/main/article?cmd=show&type=NOT&id=1308615.1

To navigate to this page from the My Oracle Support home page, click the Knowledge tab, and then click the Tools and Training menu, JD Edwards EnterpriseOne, Welcome Center, Release Information Overview.

Conventions

The following text conventions are used in this document:

Convention	Meaning
Bold	Indicates field values.
Italics	Indicates emphasis and JD Edwards EnterpriseOne or other book-length publication titles.
`Monospace`	Indicates a JD Edwards EnterpriseOne program, other code example, or URL.

1

Introduction to JD Edwards EnterpriseOne Customer Self Service

This chapter contains the following topics:

- Section 1.1, "JD Edwards EnterpriseOne Customer Self Service Overview"
- Section 1.2, "JD Edwards EnterpriseOne Customer Self Service Implementation"

1.1 JD Edwards EnterpriseOne Customer Self Service Overview

JD Edwards EnterpriseOne Customer Self Service enables customers access to their information, provides them with timely and accurate information, and enables them to submit order and support requests.

Through self service, customers can:

- Submit orders and review order status.

  Before placing orders, customers can review inventory information to determine if adequate amounts are on-hand or adequate quantities are backordered before they submit orders.

- Review shipment status.

  Customers can review estimated delivery date and time, freight charges, and shipment routes.

- Validate account transactions.

  Customers can access their account, review invoices that apply to them, and identify any accounting discrepancies.

- Compare forecast information to schedules.

  Customers can review forecast information and adjust forecasts or add new forecasts.

- Submit cases and search for resolutions.

  Customers can submit cases and search for failure analysis information or solutions to help them resolve their issues, as well as submit solutions.

- Review service information

  Customers can add and view equipment and view their contracts and work orders.

This implementation guide discusses the setup and implementation features of JD Edwards EnterpriseOne Customer Self Service system for these Oracle products:

- JD Edwards EnterpriseOne Sales Order Management
- JD Edwards EnterpriseOne Inventory Management
- JD Edwards EnterpriseOne Transportation Management
- JD Edwards EnterpriseOne Forecast Management
- JD Edwards EnterpriseOne Failure Analysis
- JD Edwards EnterpriseOne Case Management
- JD Edwards EnterpriseOne Solution Advisor

JD Edwards EnterpriseOne Service Management Customer Self Service information is located in a different implementation guide.

See "Using the Customer Self-Service Portal" in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*.

Information on using Service and Support portal applications is also located in a different guide.

See "Understanding CSS Portlets" in the *JD Edwards EnterpriseOne Tools Portal Content Configuration Guide*

1.2 JD Edwards EnterpriseOne Customer Self Service Implementation

This section provides an overview of the steps that are required to implement the JD Edwards EnterpriseOne Customer Self Service system.

Implementing JD Edwards EnterpriseOne Customer Self Service for a particular feature must be preceded by setting up the corresponding JD Edwards EnterpriseOne application from Oracle:

- JD Edwards EnterpriseOne Sales Order Management
- JD Edwards EnterpriseOne Inventory Management
- JD Edwards EnterpriseOne Transportation Management
- JD Edwards EnterpriseOne Forecast Management
- JD Edwards EnterpriseOne Failure Analysis
- JD Edwards EnterpriseOne Case Management
- JD Edwards EnterpriseOne Solution Advisor

For example, if you are implementing JD Edwards EnterpriseOne Customer Self Service to enable customers to review and submit orders, you must first set up and implement JD Edwards EnterpriseOne Sales Order Management before you implement JD Edwards EnterpriseOne Customer Self Service for Sales Order Management.

Each product's Getting Started chapter contains specific implementation and component interface information for that product. This implementation guide includes information about component interface features for customer self service as it relates to order submittal and review, shipment tracking, inventory inquiry, account payable inquiry, case submittal, failure analysis inquiry, and solution inquiry and submittal.

In the planning phase of the implementation, take advantage of all JD Edwards EnterpriseOne sources of information, including installation guides and troubleshooting information.

When determining which electronic software updates (ESUs) to install for JD Edwards EnterpriseOne Customer Self Service, use the EnterpriseOne and World Change Assistant. EnterpriseOne and World Change Assistant, a Java-based tool, reduces the time that is required to search for and download ESUs by 75 percent or more and enables you to install multiple ESUs at one time.

See *JD Edwards EnterpriseOne Tools Software Updates Guide*.

1.2.1 Installation Steps for the JD Edwards EnterpriseOne Collaborative Portal

You can use the JD Edwards EnterpriseOne Collaborative Portal to implement JD Edwards EnterpriseOne Customer Self Service. This guide does not describe in detail how to install and configure the Collaborative Portal. However, this section provides an overview of the general steps involved in installing and configuring the Collaborative Portal.

Use these steps as a guide to the installation and configuration process for the Collaborative Portal and the JD Edwards EnterpriseOne portlets. You should perform the steps in the order listed.

1. Install and configure the JD Edwards EnterpriseOne system.
2. Apply the updates, service packs, or Electronic Software Updates (ESUs) specified in the MTRs.

   See your JD Edwards EnterpriseOne installation documentation.
3. Install and configure the JD Edwards EnterpriseOne Collaborative Portal.

   JD Edwards EnterpriseOne Tools Portal Reference for Oracle Web Center Guide
4. Generate JD Edwards EnterpriseOne portlets in the WebClient_Portal.war file.

   Use both of these guides:

   - *JD Edwards EnterpriseOne Tools Form Design Aid Guide*
   - *JD Edwards EnterpriseOne Tools Release 8.98 HTML Web Server Reference Guide*
5. Install the WebClient_Portal.war file in the Collaborative Portal.

   WebSphere Portal for Multiplatforms:

   See
   http://publib.boulder.ibm.com/infocenter/wpdoc/v510/index.jsp?topic=/com.ibm.wp.ent.doc/wpf/welcome.html
6. Create pages and add portlets to pages in the Collaborative Portal.

   WebSphere Portal for Multiplatforms:

   See
   http://publib.boulder.ibm.com/infocenter/wpdoc/v510/index.jsp?topic=/com.ibm.wp.ent.doc/wpf/welcome.html

1.2.2 JD Edwards EnterpriseOne Sales Order Management-Specific Implementation Steps

These steps lists the required implementation steps for JD Edwards EnterpriseOne Customer Self Service in the Sales Order Management system:

1. Set processing options for the Recurring Orders program (P4004Z).

See "Entering Sales Orders" in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.

2. Set processing options for the Sales Blanket Order Release program (P420111).

   See "Entering Additional Orders" in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.

3. Set processing options for the Item Hierarchy (Web) program (P4101H).

   See Placing Orders.

4. Set processing options for the Keyword Search program (P418929W).

   See Placing Orders.

5. Set processing options for the Sales Order Entry program (P4210).

   See "Entering Sales Orders" in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.

6. Set processing options for the Self Service-Sales Order Inquiry program (P4210SS).

   See Working with Orders.

7. Set processing options for Order Templates (P4015W).

   See Ordering Through Templates.

1.2.3 JD Edwards EnterpriseOne Inventory Management-Specific Implementation Steps

The required implementation steps for JD Edwards EnterpriseOne Customer Self Service in the Inventory Management system are:

1. Set processing options for the Self Service-Inventory Information Inquiry program (P41204).

   See Performing Customer Inquiries.

2. Set processing options for the Item Cross Reference Self Service program (P4104SS).

   See Managing Customers and Items.

1.2.4 JD Edwards EnterpriseOne Transportation Management-Specific Implementation Step

The required implementation step for JD Edwards EnterpriseOne Customer Self Service in the Transportation Management system is:

1. Set processing options for the Self Service Shipment Tracking program (P4947S).

   See Performing Customer Inquiries.

1.2.5 JD Edwards EnterpriseOne Forecast Management-Specific Implementation Step

The required implementation step for JD Edwards EnterpriseOne Customer Self Service in the Forecast Management system is:

1. Set processing options for the Self Service-Display and Respond to Forecasts program (P3462).

   See Performing Customer Inquiries.

1.2.6 JD Edwards EnterpriseOne Failure Analysis-Specific Implementation Step

The required implementation step for JD Edwards EnterpriseOne Customer Self Service in the Failure Analysis system is:

1. Set processing options for the Self Service-Failure Analysis program (P17766SS).

   See Performing Customer Inquiries.

1.2.7 JD Edwards EnterpriseOne Case Management-Specific Implementation Step

The required implementation steps for JD Edwards EnterpriseOne Customer Self Service in the Case Management system are:

1. Set processing options for the Case Customer Self Service Inquiry and Add program (P90CG900).

   See "Setting Up Case Management Fundamentals" in the *JD Edwards EnterpriseOne Applications Customer Relationship Management for Support Implementation Guide*.

2. Set processing options for the Customer Self Service Case Update program (P90CG910).

   See "Setting Up Case Management Fundamentals" in the *JD Edwards EnterpriseOne Applications Customer Relationship Management for Support Implementation Guide*.

1.2.8 JD Edwards EnterpriseOne Solution Advisor-Specific Implementation Steps

The required implementation step for JD Edwards EnterpriseOne Customer Self Service in the Solution Advisor system is:

1. Define solutions with visibility of All so that self service users can view the solution.

   See "Setting Up Solution Advisor" in the *JD Edwards EnterpriseOne Applications Customer Relationship Management for Support Implementation Guide*.

2

Understanding Customer Self Service

This chapter contains the following topics:

- Section 2.1, "JD Edwards EnterpriseOne Customer Self Service Business Processes"
- Section 2.2, "JD Edwards EnterpriseOne Customer Self Service Implementation"

2.1 JD Edwards EnterpriseOne Customer Self Service Business Processes

JD Edwards EnterpriseOne Customer Self Service enables you to provide customers access to timely and accurate information without waiting for a response from a customer service agent. When you enable customers with quick and cost-effective access to information, not only are you making it easier for customers to conduct business with you, but you are also increasing supply chain efficiency and improving customer loyalty.

Customer Self Service enables customers to search for and access:

- Orders
- Shipments
- Inventory
- Accounts receivable
- Forecast
- Cases
- Failure analysis and solutions
- Service information

2.1.1 Orders

Customers can use self service to view their orders, including shipment information, and to update limited order information, such as quantity requested, requested date, and description. The Self Service Sales Order Inquiry program (P4210SS) processing options control how customers can access and view order information.

You can set up recurring orders; templates that you use to enter information for orders that are always the same. You can specify that the system automatically generates an order on a regular schedule. Use the processing options in the Recurring Orders program (P4004Z) to define how recurring orders are used. Use the Sales Blanket Order Release program (P420111) to release sales orders against the blanket. Using

customer self service, customers can review and possibly be prompted to approve their order information.

Customers can use the product catalog to view products by group and hierarchy to quickly search and select items to order. Use the Item Cross Reference Self Service program (P4104SS) to provide customers with their item numbers and descriptions.

Using the shopping cart functionality, customers can verify that they ordered the correct items and quantities before they confirm their orders.

2.1.2 Shipments

Using self service, customers and suppliers can review the status of shipments. Customers can review the status of shipments from the supplier (outbound shipments), including the delivery date and time, freight charges, and shipment routes. Suppliers can review status of inbound shipments. If the supplier is using Federal Express, the customer can access its shipment tracking system to review shipment status. Set up the processing options in the Self Service Shipment Tracking program (P4947S) to control how the system displays shipment information.

2.1.3 Inventory

Both suppliers and customers can use self service to review inventory information, such as general item information, item quantities, and reorder points. Customers can review this information to determine if adequate on-hand quantity is available or adequate quantities are back ordered before they place their orders. Use the Inventory Information Inquiry program (P41204) processing options to control how information displays to customers.

2.1.4 Accounts Receivable

Customers can review the transactions that only apply to them, including open invoices and payment statuses to help identify and resolve accounting discrepancies.

2.1.5 Forecast

Suppliers can use customer self service to provide customers (also known as planners) with personalized forecast information so they can compare it to schedules and modify and add new forecast information, as necessary. Set up the processing options in the Self Service- Display and Respond to Forecasts program (P3462) to specify how the system displays forecast information and what processes are available to customers.

2.1.6 Cases

Using self service, customers can initiate and update cases using the Case CSS Inquiry and Add (Case Customer Self Service Inquiry and Add) (P90CG900) and the CSS Case Update (Customer Self Service Case Update) (P90CG910) programs. Customers can enter detailed issue information, so the system can route the case to the appropriate provider group to manage the case to resolution. Using the self service case programs, customers can search for script and solution records to assist them with resolving their cases.

2.1.7 Failure Analysis and Solutions

If you are using failure analysis to support case resolution, the Self Service - Failure Analysis program (P17766SS) enables customers to access failure analysis information, including resolutions for their issues and cases.

If you are using the Solution Advisor program (P90CE050), customers can access and search for solutions to help them resolve their cases. Customers can also submit solutions for you to review and add to the solution library.

2.1.8 Service Information

Customers can use self service to:

- Add and view equipment
- View contracts
- View work orders

Note: The tasks and processes that are associated with service management customer self service are discussed in the Service Management Implementation Guide.

See "Using the Customer Self-Service Portal" in the *JD Edwards EnterpriseOne Applications Service Management Implementation Guide*.

2.2 JD Edwards EnterpriseOne Customer Self Service Implementation

You access all Customer Self Service applications on the JD Edwards EnterpriseOne Portal's Customer Self Service tab. The Customer Self Service tab contains various portlets that enable you to access certain applications in different ways. For example, you might select the appropriate task, search for specific information before accessing the application, or receive alerts that you can use to access the application.

Note: The Manage Demand Consensus link in the Tasks portlet provides direct access to the Demand Consensus functionality, which you use to work with conference rooms.

3

Working with Orders

This chapter contains the following topics:

- Section 3.1, "Managing Orders"
- Section 3.2, "Managing Recurring Orders"
- Section 3.3, "Creating Sales Orders by Releasing a Blanket Order"

3.1 Managing Orders

This section provides an overview of how to manage orders, lists prerequisites, and discusses how to set processing options for Self Service - Sales Order Inquiry (P4210SS).

3.1.1 Understanding Order Management

To place an order in a standard operating environment, the customers are usually assisted by personnel who are familiar with the system as well as with the process requirements. When you create a sales environment on the web, you must enable the customers to select items from the inventory and create sales orders based on their selection.

When the customers enter orders using Customer Self Service, the system generates orders based on the customer information that is identified during login and the products that the customers select to add to an order. At any time, the customers can cancel the order or place the order. The system does not create the order until the order is accepted. If Customer Self Service is unexpectedly disconnected, the system holds the customer's order until the customer accesses self service again. The system prompts the customer to review and continue processing the interrupted order, or delete it.

When the customers enter sales orders on the web, they can move freely between the menu applications. The system generates an order based on the customer information that is identified during login and the products that you select to add to an order.

As the customers add items to their sales orders, they can review and total the order and apply the appropriate taxes. Additionally, the customers can specify an alternate carrier or edit order information by accessing the appropriate options on the Row and Form menus. Customers can cancel the order or place the order. The system does not create the order until they accept the order.

Customers can also use self service to review information for orders, including ship-to addresses, shipments, online invoices, and accounts. The customer might receive an alert or a message that prompts the customer to review the information, or the customer might want to review order information from the supplier's system. The

customer can review and modify limited order information, such as quantity requested, requested date, and description.

The system uses the primary unit of measure from the Item Master. The system displays the unit price in the currency that is identified for the customer in the Address Book program (P01012). The system retrieves item information, such as line type, from the F4102 or F4101 table.

Each application provides an option to add items to a user's order. If they do not know the item number, the customers can click the visual assist to access the Search by Keyword form to find it.

Since order entry, inquiry, and acceptance are part of Sales Order Entry program (P4210), set these processing options for creating Customer Self Service sales orders:

- You must activate Customer Self Service.
- You can activate the option Display before Accept so that the customers can review order totals, including taxes, before the system creates records in the F4201 and F4211 tables. If you use taxed prices, the system displays the domestic or foreign taxed prices fields as read-only on the Order Acceptance form.

  See "Entering Sales Orders with Taxed Prices" in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.

  Important: Do not use online commitments in the version of the Sales Order Entry program (P4210) used for Customer Self Service. Activate the Store and Forward processing option for either Full or Partial Edit.

The enterprise (the company that uses JD Edwards EnterpriseOne software) is responsible for setting the processing options for the Self Service - Sales Order Inquiry program (P4210SS). The processing options control:

- The default sort options for sales orders.
- The format of the information.

  For example, the enterprise might specify that header information be followed by detail information.
- The types of sales orders that customers can review.
- The versions that the Self Service - Sales Order Inquiry program uses.

3.1.1.1 Taxed Prices

If you use the taxed prices and select Manage Orders in the CSS Tasks list, the system accesses the Self Service – Sales Order Inquiry program. The system displays the following read-only fields on the View Order Detail form and View Item Detail form:

- Use Taxed Prices

  If the sales order has taxed prices, the system selects this check box.
- Taxed Unit Price

  If the sales order is a foreign order, the system displays the foreign amounts in this field.
- Unit Tax Amount

If the sales order is a foreign order, the system displays the foreign amounts in this field.

- Taxed Extended Price

  If the sales order is a foreign order, the system displays the foreign amounts in this field.

- Extended Tax Amount

  If the sales order is a foreign order, the system displays the foreign amounts in this field.

See "Entering Sales Orders with Taxed Prices" in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.

3.1.2 Prerequisites

Since order entry, inquiry, and acceptance are part of the Sales Order Entry program (P4210), set these processing options for version ZJDE0010 to create orders on the web:

- You must activate the Customer Self-Service Functionality option on the Process tab.
- You can activate the Display before Accept Prompt option on the Process tab so that the customers can review order totals, including taxes, before the system creates records in the F4201 and F4211 tables.

See Also:

- "Understanding Sales Order Detail Information" in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.
- "Creating Order Templates" in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.
- " Setting Processing Options for Sales Order Entry (P4210)" in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.

3.1.3 Forms Used to Manage Orders

Form Name	FormID	Navigation	Usage
View Order Detail	W4210SSE	From the Tasks portlet, select Manage Orders and then complete the advanced search information.	Review the sales order numbers and corresponding detail lines. **Note:** If you set the processing option to display order header information, the View Order Header form appears before the View Order Detail form.
View Order Detail	W4210SSB	On the View Order Detail form, click the sales order number.	Review the information on the Order tab and Ship To Address tab.

Form Name	FormID	Navigation	Usage
View Item Detail	W4210SSC	On the View Order Detail form, click the line number.	Review the information in the Item, Price, Quantity, and Dates sections.
View Accounts Payable	W03B2003A	On the View Order Detail form, click Account Info. for the appropriate detail line.	Review the amount that is due for a sales order.
View Sales Order Invoices	W42230A	On the View Order Detail form, click On-line Invoice.	Review real-time estimated invoice amounts for a sales order.
View Invoice Tax Information by Authority	W42235A	On the View Sales Order Invoices form, click Tax Summary in the detail area.	Review tax information for a sales order.
View Invoice Discount Summary	W42240A	On the View Sales Order Invoices form, click Discount Summary.	Review discount information for a sales order.

3.1.4 Setting Processing Options for Self Service - Sales Order Inquiry (P4210SS)

Processing options enable you to specify the default processing for programs and reports.

3.1.4.1 Defaults

These processing options specify the default filter and sort options.

1. Order Filter Option
Specify the default filter option on the Advanced Search form. Enter a value from UDC 42B/FO.

2. Header Sort Option
Specify the default sort option on the View Order Header form. Enter a value from UDC 42B/HS.

3. Detail Sort Option
Specify the default sort option on the View Order Detail form. Enter a value from UDC 42B/DS.

3.1.4.2 Display

These processing options specify the types of information that the system displays.

1. Display Header or Detail
Specify whether the system displays the View Order Header form or the View Order Detail form when you inquire on orders. Values are:

Blank: Displays the search results on the View Order Detail form. The system searches the F4211 table; only detail search criteria are available on the Advanced Search form.

1:Displays the search results on the View Order Header form. The system searches the F4201 table; only header search criteria are available on the Advanced Search form.

2. Customer Item X-Reference
Specify the code that the system uses to search and display cross-reference information using a customer's item number. Cross-references associate internal item numbers with customer item numbers. You set up items in the F4104 table and create the cross-reference information in the Item Cross Reference program (P4104). If you leave this processing option blank, the system does not display cross-reference information. Enter a value from UDC 41/DT.

3. Type Code
Specify the type code of the who's who attention name that appears in the mailing address; enter a value from UDC 01/WO. If you leave this processing option blank, the system does not include the attention name line in the mailing address.

3.1.4.3 Process

These processing options specify which order types the system processes.

1. Sales Order Types (Required)
Specify the order types that appear; enter a value from UDC 00/DT. You must enter at least one code. You can enter multiple codes; to do so, enter them without punctuation or spaces.

2. Include / Exclude (Future)
Future use.

Include or exclude the defined sales order types. Values are:

Blank: The system selects records for which the order types are equal to the sales order types.

1: Selects records for which the order types are not equal to the sales order types.

3. Blanket Order Type
Specify the type of document for blanket sales orders; enter a value from UDC 00/DT.

3.1.4.4 Versions

These processing options specify the versions of programs that the system uses.

1. Self-Service - Shipment Tracking (P4947S)
Specify the version of the Self-Service - Shipment Tracking program (P4947S) that the system uses to display shipment information. If you leave this processing option blank, the system uses the ZJDE0001 version.

2. Self-Service - Customer Account Information Inquiry (P03B2003)
Specify the version of the Self-Service - Customer Account Inquiry program (P03B2003) that the system uses to display account information. If you leave this processing option blank, the system uses the ZJDE0001 version.

3. Self-Service - On-line Invoice (P42230)
Specify the version of the Online Invoice Inquiry program (P42230) that the system uses to display billing information. If you leave this processing option blank, the system uses ZJDE0001.

4. Self-Service - Sales Order Entry (P4210) - (Future use)
Specify the version of the Sales Order Entry program (P4210) that the system uses to retrieve customer self service processing information. If you leave this processing option blank, the system uses the ZJDE0001 version.

3.2 Managing Recurring Orders

This section provides an overview of recurring orders, lists prerequisites, and lists the forms used to manage recurring orders.

3.2.1 Understanding Recurring Orders

Recurring orders are templates that you use to enter information for orders that are always the same; creating recurring orders saves time. You can automatically generate an order weekly, monthly, or yearly.

You also can search for existing recurring orders and modify the recurring orders. For example, you can change sold to and ship to information, quantities, and unit prices.

3.2.1.1 Taxed Prices

If you use the taxed prices and select Add Recurring Orders in the CSS Tasks list, the system accesses the Recurring Orders program (P4004Z). If the Sales Taxed Prices Constant is selected in the System Constants program (P41001), then the system displays the Use Taxed Prices check box in the header of the Add Recurring Orders form. If you select the Use Taxed Prices check box, the system automatically calculates and displays the following read-only fields:

- Taxed Unit Price
- Taxed Extended Price
- Unit Tax Amount
- Extended Tax Amount

The system displays the same fields on the Manage Recurring Orders form and the Edit Recurring Order form.

See "Entering Sales Orders with Taxed Prices" in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.

3.2.2 Prerequisite

Before you can use recurring orders, you must set up the processing options for the Recurring Orders program (P4004Z).

See "Processing Recurring Sales Orders" in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.

3.2.3 Forms Used to Manage Recurring Orders

Form Name	FormID	Navigation	Usage
Manage Recurring Orders	W4004ZB	From the Tasks portlet, select Manage Recurring Orders.	Ensure that the enterprise has activated the processing option for Customer Self Service functionality in the Recurring Orders program (P4004Z). Review the information in the detail area for each order number and select the order for which you want to manage information.
Edit Recurring Order	W4004ZA	On the Manage Recurring Order form, click Edit Order.	Modify the information in the header area and detail area and click Save Order. **Note:** You can also delete a line on the order or delete the entire order.

3.3 Creating Sales Orders by Releasing a Blanket Order

This section provides an overview of blanket orders and lists the prerequisite and forms used to release blanket orders.

3.3.1 Understanding Blanket Orders

You can create sales orders for customers with blanket orders. You use the Sales Blanket Order Release program (P420111) to manually deduct item quantities from a blanket order. The system creates a sales order for the quantity that you specify.

The system consolidates order lines based on sold to, branch/plant, and currency code information. The order numbers that a user enters can be consolidated in the same way as the system-generated sales orders. For example, if you select multiple records to release and enter a new order number for the first record only, the system consolidates the orders.

If you are using the Customer Self Service version of the Sales Blanket Order Release program in the Customer Relationship Management system, you can partially release quantities from multiple blanket orders and from multiple lines on blanket orders provided that you have set the appropriate processing options. When the system creates the sales orders, you can review each sales order number that results. You can also cancel a single line that has been released (as opposed to having to cancel all of the lines that have been released).

3.3.1.1 Taxed Prices

If you use the taxed prices and select Release Blanket Orders in the CSS Tasks list, the system accesses the Sales Blanket Order Release program. The system retrieves the taxed prices from the original blanket order and displays the values in the following read-only fields on the Search and Release Blanket Orders form:

- Taxed Unit Price

- Unit Tax Amount
- Taxed Extended Price
- Foreign Taxed Extended Price
- Extended Tax Amount
- Foreign Extended Tax Amount

See "Entering Sales Orders with Taxed Prices" in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.

3.3.2 Prerequisite

Before you can use customer self service to release blanket orders, you must set up the processing options for the Sales Blanket Order Release program.

See "Entering Blanket Orders" in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.

3.3.3 Forms Used to Release Blanket Orders

Form Name	FormID	Navigation	Usage
Search and Release Blanket Orders	W420111B	From the Tasks portlet, select Release Blanket Orders.	Select the blanket order for which you want to release full or partial quantities.
Specify Release Details	W420111C	On the Search and Release Blanket Orders form, select the blanket order and click Specify Release Details.	Enter a new quantity in the Quantity to Release field. The system automatically populates the Quantity to Release field with a value of **1**. If you do not want to release any quantity, enter **0**. Review and change the value in the Request Date field, if necessary, and then click Release to Sales Order to generate sales orders. Click Cancel to release no quantities. The system creates one or more sales orders based on the quantities that you have chosen to release.
Released Sales Order Confirmation	W420111D	On the Specify Release Details form, click Release to Sales Order.	Review the sales order numbers that the system created for the quantities that you released.

4

Placing Orders

This chapter contains the following topics:

- Section 4.1, "Ordering Through the Product Catalog"
- Section 4.2, "Ordering Through Templates"

4.1 Ordering Through the Product Catalog

This section provides an overview of the product catalog, lists a prerequisite and discusses how to:

- Set processing options for Keyword Search (P41829W).
- Set up Item Hierarchy (Web) (P4101H).

4.1.1 Understanding the Product Catalog

When customers access the enterprise's Web site, they can view products by group and hierarchy. Instead of having customers scroll through a list of inventory, you can assign items to groups and hierarchies in the Item Hierarchy (Web) program (P4101H). Assigning items to groups and hierarchies enables you to create departments, which customers use during order entry, when browsing for items.

The enterprise can also provide customers with customers' own item numbers and descriptions, as defined in the customer item cross-reference, which simplifies selecting an item from the catalog and adding the item to the shopping cart.

When the customers review the inventory for products, you must give them an opportunity to locate items based on descriptive text. Customers can use Keyword Search to locate items based on the descriptions that you defined in the Item Master Revisions form. To add the item to the order, select it, and click Add to Shopping Cart.

4.1.1.1 Taxed Prices

If the Sales Taxed Prices and the By Ship To constant is selected in the Branch Plant Constants program (P41001) and the ship to customer is set up to use taxes prices in the Customer Master program (P03013), the system displays the value in the Taxed Unit Price field as read-only on the Product Information form. If the Sales Taxed Prices and the By Sold To constant is selected in the Branch Plant Constants program, the system does not display the Taxed Unit Price field.

If you override the customer value by selecting the Override Ship To button on the Product Information form, the system calculates the taxed unit price based on the tax rate and tax area of the new customer.

See "Entering Sales Orders with Taxed Prices" in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.

4.1.2 Prerequisite

Before you can use the product catalog, you must define the processing options for the Item Hierarchy (Web) program and the Keyword Search program.

4.1.3 Forms Used to Order Through the Product Catalog

Form Name	FormID	Navigation	Usage
Search by Keyword	W41829WA	From the Tasks portlet, select Keyword Search.	Locate an item by keyword and add it to the shopping cart.
Product Catalog	W4101HA	From the Tasks portlet, select Order Through Product Catalog.	Select the appropriate category for the item that you want to order.
Product Listing	W4101HC	On the Product Catalog form, click the appropriate category that contains the item.	Select the item that you want to order.
Product Information	W40ITM3A	On the Product Listing form, click the item.	Specify the quantity that you want to order and the approximate date that you need to receive the item. Review the ship to information (which you can override), select the option for viewing shopping cart prior to placing the order, and then click Add to Shopping Cart.
Add Sales Order	W4210A	On the Product Information form, click Add to Shopping Cart.	Review and modify the order information as necessary and click Checkout.
Order Acceptance	W42232A	On the Add Sales Order form, click Checkout.	Click Place Order.

4.1.4 Setting Processing Options for Keyword Search (P41829W)

Processing options enable you to specify the default processing for programs and reports.

4.1.4.1 Process

1. Customer Self-Service Mode

Specifies whether you are creating an order in standard order entry mode or Shopping Cart (Self Service) mode. If you select Shopping Cart mode, you can select items from multiple applications before using Sales Order Entry (P4210) to create an order. You might use this feature if you are entering orders in a web environment. Values are:

Leave blank for standard mode or enter **1** for shopping cart mode.

2. Sales Order Entry Version
Specify a version of Sales Order Entry. The system uses this version only in the Customer Self-Service Mode.

3. Item Restriction Mode
Enter **1** to activate item restriction processing (only in Customer Self-Service Mode). Leave blank for no item restriction logic.

4. Show Item Availability
Enter **1** to show the product availability.

4.1.5 Setting Up Item Hierarchy (Web) (P4101H)

Processing options enable you to specify the default processing for programs and reports.

4.1.5.1 Defaults

Structure Type
Specify a user defined code (01/TS) that identifies a type of organizational structure that has its own hierarchy in the Address Book system (for example, email). When you create a parent/child relationship for accounts receivable, the structure type must be blank.

SO Entry Version (P4210)
Specify a version of sales order entry (P4210).

4.1.5.2 Process

1. Item Restrictions (1/0)
Enter **0** or leave blank and the system does not check for item restrictions or enter **1** and the system checks for item restrictions.

2. Check Availability (1/0)
Enter **0** or leave blank and the system does not check item availability or enter **1** and the system checks for item availability.

3. Item File
Leave this processing option blank to specify that the system retrieves category codes from the item master, or enter **1** and the system retrieves category codes from the item/branch.

4.2 Ordering Through Templates

This section provides an overview templates and discusses how to set processing options for Order Templates (P4015W).

4.2.1 Understanding Templates

You can use templates to expedite order processing by displaying the customer's most frequently ordered items.

Customers can access their preferred selections with templates through Order Templates. Order Templates is a method to group items for the customers and speed the order entry process. Customers can create their own product groups that contain lists of their most commonly ordered items. Additionally, the customers can create a

template from order history. The system retrieves the order information from the F42119 table.

At order entry time, customers can select the Order Templates group they wish to use. From the list of items that appear, they enter a quantity to order or they accept commonly ordered amounts.

4.2.2 Forms Used to Order Through Templates

Form Name	FormID	Navigation	Usage
Manage Order Templates	W4015WA	From the Tasks portlet, select Order Through Templates.	Select the template from which you want to create a sales order.
Select Items	W40215A	On the Manage Order Templates form, select the template and click Select.	Select the line that contains the item that you want to order and specify the quantity, unit of measure, and request date.
Add Sales Order	W4210A	On the Select Items form, click the Select option for the appropriate line and then click Add to Shopping Cart.	On the Detail Revisions tab, review the Ship To and Sold To information (which you can override) and the quantities of the items that you have requested.
Order Acceptance	W42232A	On the Add Sales Order form, click Checkout.	Click Place Order.

4.2.3 Setting Processing Options for Order Templates (P4015W)

Processing options enable you to specify the default processing for programs and reports.

4.2.3.1 Versions

Order Template Revisions (P4015)
Specify a version of order template revisions (P4015).

Order Templates (P40215)
Specify a version of order templates (P40215).

Sales Order Entry (P4210)
Specify a version of sales order entry (P4210).

4.2.3.2 Process

Order Template Processing
Specify which address number is used to create and display templates. Templates can be based on the Sold To Address or the Ship To Address values established in Customer Billing Instructions (P03013). Values are:

Blank or **1**:Use the sold to address.

2:Use the ship to address.

5

Working with the Shopping Cart

This chapter contains the following topics:

- Section 5.1, "Viewing and Modifying the Contents of the Shopping Cart"
- Section 5.2, "Adding Items to the Shopping Cart"

5.1 Viewing and Modifying the Contents of the Shopping Cart

This section provides an overview of the shopping cart and lists the forms used to view and modify the contents of the shopping cart.

5.1.1 Understanding the Shopping Cart

Before you check out and place an order, you can verify and modify the contents of the shopping cart to ensure that the order is complete and correct. After you place the order, the system updates the F4201 and F4211 tables.

5.1.2 Forms Used to View and Modify the Contents of the Shopping Cart

Form Name	FormID	Navigation	Usage
Add Sales Order	W4210A	From the Tasks portlet, select View Shopping Cart.	Review each line that corresponds to the items that you have selected. Modify the information as necessary.
Order Acceptance	W42232A	On the Add Sales Order form, click Checkout.	Save changes by placing the order.

5.2 Adding Items to the Shopping Cart

This section provides an overview of addition items to the shipping cart, and lists the forms used to add items to the shopping cart.

5.2.1 Understanding Additions to the Shopping Cart

If you already know which items from the product catalog you want to order, you can order the items directly, rather than using the Item Hierarchy (Web) program (P4101H).

5.2.1.1 Taxed Prices

If you use taxed prices and are adding a sales order, you have the option to select or deselect the Use Taxed Prices check box. After you process one line in the sales order, the system changes this check box to read-only.

Also, the system automatically calculates the values and displays either the domestic or foreign fields as read-only on the Product Information Add Sales Order form:

- Taxed Unit Price
- Foreign Taxed Unit Price
- Unit Tax Amount
- Foreign Unit Tax Amount
- Taxed Extended Price
- Foreign Taxed Extended Price
- Extended Tax Amount
- Foreign Extended Tax Amount

See "Entering Sales Orders with Taxed Prices" in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.

5.2.2 Forms Used to Add Items to the Shopping Cart

Form Name	FormID	Navigation	Usage
Add Sales Order	W4210A	From the Tasks portlet, select Add to Shopping Cart by Item.	Specify information such as requested date, item number, and unit of measure.
Order Acceptance	W42232A	On the Add Sales Order form, click Checkout.	Place the order.

6

Performing Customer Inquiries

This chapter contains the following topics:

- Section 6.1, "Displaying Inventory Information for Customers"
- Section 6.2, "Tracking Shipments"
- Section 6.3, "Reviewing Account Information"
- Section 6.4, "Reviewing Forecast Information"
- Section 6.5, "Reviewing Problem Analysis Information"

6.1 Displaying Inventory Information for Customers

This section provides an overview of inventory information and lists a prerequisite and discusses how to set processing options for Self Service – Inventory Information Inquiry (P41204).

6.1.1 Understanding Inventory Information

Both suppliers and customers can use self service functionality to review a variety of inventory information, such as general item information, item quantities, and reorder points. A customer might want to review inventory to determine whether adequate on-hand quantity of an item exists for an order and whether an item is backordered. Processing options for the Self Service - Inventory Information Inquiry program (P41204) indicate whether the user is a supplier or customer.

6.1.2 Prerequisite

Before you complete the tasks in this section:

- An administrator within the enterprise sets the appropriate processing options in the Self Service - Inventory Information Inquiry program to control information such as whether the system displays summary or detail information and whether the user is a supplier or customer.
- An administrator within the enterprise completes the appropriate processing option in the Self Service - Inventory Information Inquiry program with the cross-reference type from the F4104 table that the system uses when it searches for inventory information.

6.1.3 Forms Used to Display Inventory Information for Customers

Form Name	FormID	Navigation	Usage
Search for Inventory Information	W41204A	From the Tasks portlet, select View Inventory Availability.	Locate the appropriate item number.
View Inventory Information	W41204B	On the Search for Inventory Information form, select the appropriate item number.	Refine the information that you want to view by selecting the appropriate view option, and then click Refresh. If the Quantity Available field appears in red, an inventory shortage exists. Depending on how the processing option is set, the system either displays the actual quantity or **Yes** or **No**.

6.1.4 Setting Processing Options for Self Service - Inventory Information Inquiry (P41204)

Processing options enable you to specify the default processing for programs and reports.

6.1.4.1 Defaults

These processing options specify the types of information that the system displays.

1. Display Option
Specify how the system displays records and quantities for the default display option. Values are:

Blank or **1:** Displays records in summary mode and quantities at the item level.

2: Displays records in detail mode and quantities at the item/branch level.

2. Supplier View Option
Specify the default view option for the supplier. Values are:

01: Display all items.

02: Display only the items whose on-hand quantity is zero or a negative number.

03: Display only the items whose on-hand quantity is below the safety stock level.

3. Customer View Option
Specify the default view option for the customer. Values are:

01: Display all items.

02: Display only the items with an available quantity greater than zero.

4. Quantity Display Option
Specify how the system displays quantities. Values are:

Blank: Displays quantities in the actual numeric value.

1: Displays **Yes** if the actual quantity exceeds zero; displays **No** if the actual quantity is less than or equal to zero.

6.1.4.2 Process

These processing options specify the supplier and customer information that the system processes.

1. Supplier Cross-Reference Type and 2. Customer Cross-Reference Type
Specify the cross-reference type by which the system searches for cross-reference information for a supplier item number or customer item number; enter a value from UDC 41/DT. Cross-references associate internal item numbers with the supplier's item numbers or the customer's item numbers. You can set up items in the F4101 table and create the cross-reference information in the Item Cross Reference program. If you leave these processing options blank, the system does not display and process any cross-reference information.

3. Supplier Search Type
Specify the search type for the supplier; enter a value from UDC 01/ST. If you leave this processing option blank, the system uses search type *V*.

4. Customer Search Type
Specify the search type for the customer; enter a value from UDC 01/ST. If you leave this processing option blank, the system uses a search type *C*.

6.2 Tracking Shipments

This section provides an overview of shipment tracking and lists the prerequisite and discusses how to set processing options for Self Service Shipment Tracking program (P4947S).

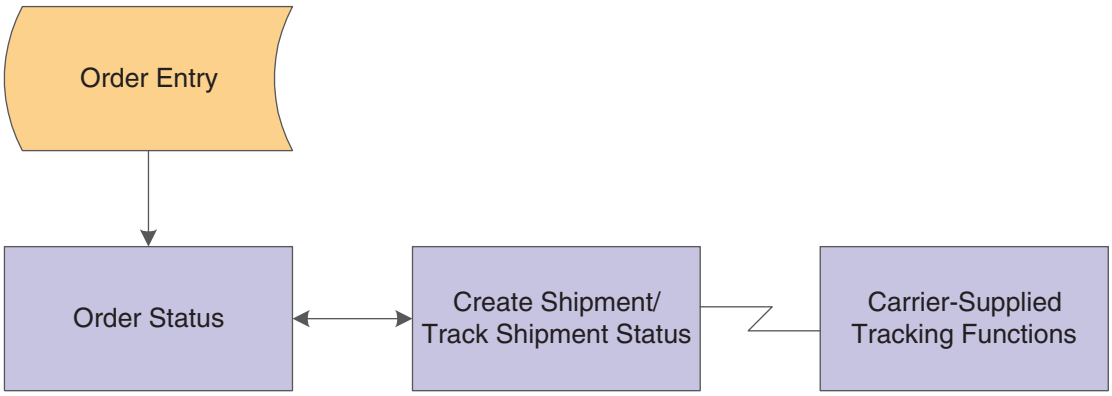
6.2.1 Understanding Shipment Tracking

Both customers and suppliers can use self service functionality to review the status of shipments. Customers can review the status of shipments from the supplier (outbound shipments), including the delivery date and time, freight charges, and shipment routes. Suppliers can also review the status of inbound shipments.

The system displays all the shipments for the customer, and the customer can select a shipment and review the detailed information. Also, if the supplier is using a carrier who has a shipment tracking system, the customer can access the carrier's shipment tracking system to review the shipment status.

This example illustrates the process to track shipments:

Figure 6–1 Tracking shipments process



6.2.2 Prerequisite

The organization must set processing options in the Self Service Shipment Tracking program (P4947S) to specify shipment statuses that the system uses to display shipments, customer and supplier cross-reference types, and the version of the Self Service Sales Order Inquiry program (P4210SS) to use.

6.2.3 Forms Used to Track Shipments

Form Name	FormID	Navigation	Usage
View Shipments	W4947SB	From the Tasks portlet, select Track Shipments, and then complete the advanced search information.	Select the appropriate shipment.
View Shipment Detail	W4947SC	On the View Shipments form, click the shipment number.	Click the Shipment Information tab to review freight information and shipment tracking information. **Note:** If the shipment has more than one route, the system displays the multiple routes and does not display the Track with Carrier option, which enables you to access the tracking system for an external carrier. Click the Date and Time tab to review information about shipment and delivery dates and times. Click the Ship to Address tab to review the address for the recipient of the shipment.

6.2.4 Setting Processing Options for Self Service Shipment Tracking (P4947S)

Processing options enable you to specify the default processing for programs and reports.

6.2.4.1 Default

These processing options specify the default values for shipment statuses and sorting.

1. Shipment Status From (Required) and 2. Shipment Status Thru (Required)
Specify the lowest shipment status or highest shipment status in a range of shipment statuses; enter a value from UDC 49/SS. The system uses the shipment status to display the list of shipments.

3. Sorting Option (Required)
Specify the default sorting order that the system applies to the list of shipments; enter a value from UDC 49/SB.

6.2.4.2 Display

These processing options specify how the system displays information.

1. Customer Cross-Reference Type and 2. Supplier Cross-Reference Type
Specify the cross-reference type by which the system searches for cross-reference information for a supplier item number or customer item number; enter a value from UDC 41/DT. Cross-references associate internal item numbers with the supplier's item numbers or the customer's item numbers. You can set up items in the F4101 table and create the cross-reference information in the Item Cross Reference program. If you leave these processing options blank, the system does not display and process any cross-reference information.

3. Type Code
Specify the Who's Who attention name that appears in the mailing address; enter a value from UDC 01/WO.

6.2.4.3 Versions

This processing option specifies the version of the Self Service - Sales Order Inquiry program (P4210SS) that the system uses.

1. Self Service Sales Order Inquiry (P4210SS)
Specify which version of the Self Service - Sales Order Inquiry program (P4210SS) the system uses to display sales order information. If you leave this processing option blank, the system uses version ZJDE0001.

6.3 Reviewing Account Information

This section provides an overview of account information and lists the forms used to review account information.

6.3.1 Understanding Account Information

Customers can use self service functionality to review their accounts payable information for only the transactions that pertain to them. Customers can review open invoices and payment statuses, and help to identify and resolve accounting discrepancies in the organization (the company that uses JD Edwards EnterpriseOne software).

6.3.2 Forms Used to Review Account Information

Form Name	FormID	Navigation	Usage
View Accounts Payable Information	W03B2003A	From the Tasks portlet, select View Account Information.	Refine the information that the system displays by selecting the appropriate view and sort options and refreshing the display.
Account Information Detail	W03B2003D	On the View Accounts Payable Information form, select the appropriate invoice number.	Review the information on the Invoice Details, Amounts, and Dates tabs.

Form Name	FormID	Navigation	Usage
View Customer Receipts	W03B2003C	On the Account Information Detail form, click View Receipts. If the invoice does not have any receipt information, the system does not display the View Receipts option on the Account Information Detail form.	Review the customer's receipts.
View Order Detail	W4210SSE	On the View Accounts Payable Information form, click the sales order number in the detail area. If no detail information exists for the sales order, the system displays a message.	Review the information on the Order and Ship To Address tabs.

6.4 Reviewing Forecast Information

This section provides an overview of forecast information and lists the prerequisites and discusses how to set processing options for Self Service – Display and Respond to Forecasts program (P3462).

6.4.1 Understanding Forecast Information

Forecasting is the process of projecting past sales demand into the future. Implementing a forecasting system enables you to quickly assess current market trends and sales so that you can make informed decisions about the company's operations. With Customer Self Service, customers can access the forecasts you have created for them. They can review and revise the forecasts for their company.

The system displays the forecast values and actual quantities or sales order extended price for the customer over a specified period of time. When the customers revise a forecast, they can manually change information in their forecast and enter descriptive text for the forecast. Customers can only access their own forecast.

The system retrieves customer information, such as the customer number and currency code information, based on the login, which is attached to an address book number in User Profiles. If the customers do not enter a branch/plant in the processing options for Sales Order Entry (P4210), the system retrieves the default branch/plant based on the Ship-To address for the order.

6.4.2 Prerequisite

Before you complete the tasks in this section:

- The organization must set the ABC Code Sales Value to **A** in the customer master information in the software to indicate that the customer who uses the Self Service - Display and Respond to Forecasts program (P3462) is a large customer. Indicating that the customer is a large customer enables the Self Service - Display and Respond to Forecasts program to select only the records that apply to that customer.
- The organization can set the appropriate processing options for the Self Service - Display and Respond to Forecasts program to specify both the way in which the

system displays information and the activities, such as reviewing or modifying information, that customers are allowed to perform. The organization can also use processing options to specify different forecast types and the unit of measure in which the system displays forecasts.

6.4.3 Forms Used to Review Forecast Information

Form Name	FormID	Navigation	Usage
View Available Items/Branches	W3462C	From the Tasks portlet, select Manage Forecasts and complete the advanced search information.	Select to review forecast information for an item. **Note:** You may have two options for the Detail Forecast field: **View** and **Edit**. **Edit** appears only if you have authority to modify forecast information.
View Forecast Information	W3462B	On the View Available Items/Branches form, click View in the Detail Forecast field for the appropriate item.	Review information such as request date, forecast quantity, forecast amount, original quantity, and original amount.

6.4.4 Setting Processing Options for Self Service - Display and Respond to Forecasts (P3462)

Processing options enable you to specify the default processing for programs and reports.

6.4.4.1 Display

These processing options specify the types of information that the system displays.

1. Forecast Type (Required)

Specify the forecast type that the system displays; enter a value from UDC 34/DF.

2. Unit of Measure

Specify the unit of measure that the system uses. Values are:

Blank: Use the primary unit of measure from the F4101 table.

1: Use the pricing unit of measure from the F4101 table.

2: Use the shipping unit of measure.

6.4.4.2 Process

These processing options specify the types of information, such as user permissions for modifying forecasts, that the system processes.

1. Edit Mode

Specify the type of forecast actions that can be performed. Values are:

Blank: Do not allow edits and do not add forecasts.

1: Allow edits to generated forecasts only.

2: Allow edits to generated forecasts and add new forecasts within the user-defined date range.

3: Allow edits to generated forecasts and add new forecasts to any date.

2. User-Defined From Date and 3. User-Defined Thru Date
Specify the date from which, or the date through which the user is allowed to enter new forecasts. The system uses this date only if the Edit Mode processing option value is **2**.

4. Customer Cross Reference Type
Specify the code with which the system searches cross-reference information using a customer item number. Cross-references associate internal item numbers with the customer's item numbers. You can set up items in the F4101 table and create the cross-reference information in the Item Cross Reference program. Enter a value from UDC 41/DT. If you leave this processing option blank, the system does not display or process any cross-reference information.

5. Maximum Number of Matches
Use this processing option to specify the maximum number of records to display when searching for information.

6.4.4.3 Interop

These processing options specify information that the system uses for export processing.

1. Transaction Type
Specify the transaction type that the system uses for export processing. Enter a value from UDC 00/TT. If you leave this processing option blank, the system does not perform export processing.

2. Before/After Image Processing
Specify whether the system writes before and after images for export processing. Values are:

Blank: After images only.

1: Before and after images.

6.5 Reviewing Problem Analysis Information

This section provides an overview of problem analysis information and discusses how to set processing options for Self Service - Failure Analysis program (P17766SS).

6.5.1 Understanding Problem Analysis Information

The Self Service - Failure Analysis program (P17766SS) enables customers to access failure analysis information, including problems, analyses, and resolutions for issues with assets such as inventory items, equipment, product models, and so forth. Having access to this information enables customers to solve problems internally, reduce costs, increase production, reduce downtime, and increase the longevity of assets.

6.5.2 Forms Used to Review Problem Analysis Information

Form Name	FormID	Navigation	Usage
Search Problem Analysis	W17766SSC	From the Tasks portlet, select Search Problem Analysis.	Select to view information about the problem.
View Suggested Analyses/Resolutions	W17766SSB	On the Search Problem Analysis form, click View for the appropriate problem description.	Review the problem description and access more detailed information.
View Resolution Detail	W17766SSD	On the View Suggested Analyses/Resolutions form, click the resolution description.	Review the descriptive text for the resolution.

6.5.3 Setting Processing Options for Self Service - Failure Analysis program (P17766SS)

Processing options enable you to specify the default processing for programs and reports.

6.5.3.1 Defaults

These processing options specify the default filter and sort options.

1. Failure Analysis Type
Specify the default failure analysis type; enter a value from UDC 17/FT. The system uses this information when searching for and also adding failure analysis codes. Values are:

Blank: All types

1: Values

2: Analyses

3: Resolutions

6.5.3.2 Process

These processing options specify how the system displays information.

1. Maximum Record Counter
Specify the number of records that the system displays. If you leave this processing option blank, the system displays 100 records.

2. Equipment Number Format
Specify how the system validates and displays the equipment number. Values are:

Blank: Equipment constants.

1: Equipment number

2: Unit number

3: Serial number

3. Media Object Display
Specify which media object displays. Values are:

Blank: Display First Generic Text Item

1: Display First Image Item

2: Display First OLE Item

3: Display First URL/File Item (FUTURE)

6.5.3.3 Display

These processing options specify the types of information that the system displays.

1. Customer Item X-Reference

Specify how the system searches for and displays cross-reference information; enter a value from UDC 41/DT. If you leave this processing option blank, the system does not display cross-reference information.

Cross-references associate internal item numbers with the customer's item numbers. You set up items in the F4104 table and create cross-reference information in the Item Cross Reference program.

7

Managing Customers and Items

This chapter contains the following topics:

- Section 7.1, "Managing Customer Information"
- Section 7.2, "Managing Customer Item Numbers"

7.1 Managing Customer Information

This section provides an overview of customer information and lists the forms used to manage customer information.

7.1.1 Understanding Customer Information

Customers can access order and invoice information to review the status of the account. They can review and revise information about their company, their company's forecast, or their orders. They can also review invoices or compare the total accounts receivable and open orders to their current credit limit, which is assigned in the F03012 table, to determine if the credit limit has been exceeded.

A customer can also review additional information about the customer master information that is contained in the enterprise system. However, this information is for display only.

By reviewing and modifying address book information, the customer can resolve discrepancies within the enterprise system. Reviewing customer master information enables the customer to identify discrepancies and communicate them to the enterprise.

7.1.1.1 Changing Name, Address, and Telephone Information

After you create the database of information about a customer, you maintain the database to ensure that the information is current. Company information such as name, address, and phone numbers can change. Also, information about employees and other individuals associated with the company can change. To support efforts to keep the address book information current, you can activate self service for the Address Book program (P01012).

When you activate self service for the Address Book, you enable the customers to review and change specific address book information about themselves such as name, address, phone number, effective date and who's who address book information.

7.1.1.2 Personalizing Customer Information

You can enable customers to further personalize their company information through Customer Self Service. Depending upon their business practices, customers can further

customize Customer Self Service by selecting different ship-to addresses or entering their purchase order numbers in the sales order header.

The customer's company might order items for multiple locations in one sales order. Customer Self Service sales order functionality enables them to select a different ship-to address for different order lines within each sales order they create.

The ship-to addresses for the customer can be organized into structures that correlate to their company, or the customers can select from all addresses related to their company within the Address Book program (P01012). You specify the method the customer uses to select ship-to address by enabling the Customer Self Service Ship To Structure Type processing option on the defaults tab in the Sales Order Entry program (P4210).

Customers can specify a purchase order number on their Customer Self Service sales order header. This enables them to better track their purchases and can help them fulfill their accounts payable processes.

7.1.2 Form Used to Manage Customer Information

Form Name	FormID	Navigation	Usage
Self Service — Update Address Book Records	W01012SSA	From the Tasks portlet, select Manage Customer Information.	Review the Company Name, Company Address, and Company Contact Information group boxes. Select to modify customer name information. Modify the primary mailing name and secondary mailing name. After you click OK, the system saves the changes. Modify company contact information. Review information such as payment terms, the date the account was opened, to whom to send statements, delivery instructions, tax information, and so forth. **Note:** You can request a credit limit change. The system sends an electronic message to the credit manager.

7.2 Managing Customer Item Numbers

This section provides an overview of customer item numbers and discusses how to set processing options for Item Cross Reference Self Service program (P4104SS).

7.2.1 Understanding Customer Item Numbers

The Item Cross Reference Self Service program (P4104SS) enables you to manage the relationship between customer item numbers and the supplier's item numbers. Typically, customers use this program to review, manage, and add cross-reference items to the enterprise's database.

7.2.2 Forms Used to Manage Customer Item Numbers

Form Name	FormID	Navigation	Usage
Add Customer Item Numbers	W4104SSB	From the Tasks portlet, select Add Customer Item Numbers.	Add customer item numbers. To save the new item numbers, click OK.
Manage Customer Item Numbers	W4104SSA	From the Tasks portlet, select Manage Customer Item Numbers.	Modify customer item numbers. To save changes, click OK.
Edit Customer Item Numbers	W4104SSB	On the Manage Customer Item Numbers form, select the row that contains the appropriate item number and click Edit.	Review and modify information such as customer item number, customer item description, supplier item number, and effective and expired dates. You can also add another customer item number on this form by selecting the Add Item Cross-Reference option.

7.2.3 Setting Processing Options for Item Cross Reference Self Service (P4104SS)

Processing options enable you to specify the default processing for programs and reports.

7.2.3.1 Defaults

These processing options specify the default filter and sort options.

1. Customer Item Cross Reference Type Code

Enter a value from UDC 41/DT. The system uses default value **C** (customer part numbers).

2. Customer Self Service Address Structure

Specify the address book organizational structure type to display; enter a value from UDC 01/TS. If you leave this processing option blank, the system displays all related address numbers.

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