PeopleSoft®

EnterpriseOne Customer Self-Service 8.9 PeopleBook

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EnterpriseONE
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Working with User Administration

Before a supplier or customer can begin using the Supplier and Customer Self-Service applications, the enterprise (the company using the J.D. Edwards software) must designate a user at the supplier or customer company who can perform user administration tasks. The user who performs user administration tasks does so only for employees within the user's company. The user administration tasks can include:

- Adding, modifying, and deleting user profiles, which are sets of information for grouping users
- Changing user preferences, such as date format, date separator, language, and country
- Resetting user passwords
- Managing predefined roles, which govern the user's level of access to the portal workspace and portal components

► To add or modify a user profile

From the J.D. Edwards Supplier Self-Service workspace or the Customer Self-Service workspace, in the Administrator Tasks workspace component, choose Manage User Profiles.

1. On View Company Users, locate the user ID for the user whose profile you are adding or modifying, and do one of the following:
   - To add a user profile, click Add.
   - To modify a user profile, click the user ID.
2. On User Information and Preferences, in the User ID group box, click Edit.
3. On Manage User's Profile and Preferences, complete the following fields and click Submit:
   - User ID
   - Language
   - Date Format
   - Date Separator Character
   - Decimal Format Character
   - Country
4. On User Information and Preferences, click Close.
5. On View Company Users, click Close.

► To delete a user profile

From the J.D. Edwards Supplier Self-Service workspace or the Customer Self-Service workspace, in the Administrator Tasks workspace component, choose Manage User Profiles.

1. On View Company Users, enter the user ID that corresponds to the user profile that you want to delete and click Search.

   To display all user profiles, click Search.

2. Click Delete in the Action field for the user whose user profile you need to delete.

   The system deletes the user profile information in the One World Security table (F98OWSEC) and Role Relationships Table (F95921).

► To modify role relationships

From the J.D. Edwards Supplier Self-Service workspace or the Customer Self-Service workspace, in the Administrator Tasks workspace component, choose Manage User Profiles.

1. On View Company Users, locate and choose the user ID of the user whose role relationships you need to modify.
2. On User Information and Preferences, click Edit in the User/Role Relationships group box.
3. On Manage User's Role Relationships, locate the roles that you wish to assign or remove.
4. Click Assign or Remove in the Action column, and then click Close.
5. On User Information and Preferences, click Close.
6. On View Company Users, click Close.

► To modify a user password

From the J.D. Edwards Supplier Self-Service workspace or the Customer Self-Service workspace, in the Administrator Tasks workspace component, choose Manage User Passwords.

1. On View Company Users, locate the user ID of the user whose password you want to modify, and then click Edit in the Password column.
2. On Administrative Password Revisions, complete the following fields, and then click Submit:
   - New Password
   - New Password Verify

   The system saves the new password.

3. On View Company Users, click Close.

Portal Workspaces

If your system administrator has granted you the ability to personalize workspaces, you can add new workspaces to the Portal.

The workspace that you create is not public; that is, only you can see it. However, you can grant other individuals the following kinds of rights to your workspace:

- View

  Individuals who have View rights can see your workspace and personalize the appearance on their workstations. They cannot affect the workspace in any other way.

- View/Edit

  Individuals who have View/Edit rights can view and make changes to the workspace.

- View/Edit/Grant Permissions

  Individuals who have View/Edit/Grant Permissions rights can view and change the workspace, and can also grant rights to other individuals.

You can personalize your workspaces. From the Personalize form, you can change the following characteristics for a workspace:

- Workspace ID (Workspace Name)
- Environments in which the workspace can appear (PC, Windows CE, Pocket PC)
- Title
- Components (add, remove, rearrange)
- Columns (add, remove)
- Workspace Navigation Bar links
- Colors
- Background image
- Toolbar logo and background image
- Access privileges

To personalize a workspace, you must have View/Edit rights to the workspace. You alone are granted View/Edit/Grant Permissions rights automatically with any workspace that you create. You might not have access privileges to some public workspaces.

Personalizing Customer Self-Service

If your system administrator has granted you the ability to personalize components, you can personalize information within the following workspace components (consider that your unique workspace might not contain all of the following workspace components):

- Customer Order Status Alerts
- Shipment Delivery Status

To restore the default settings for the workspace components, exit without saving your changes.

In the Customer Order Status workspace component, you can click the Personalize icon to specify the following information:

- The number of days in the past for viewing items that have been shipped.

The system uses the number that you specify to determine when to provide you with an alert. For example, you might want to review only those items that have been shipped within the last 10 days.

- The default sorting order that the system applies to the header and detail information.

  The system can sort the header and detail information by sales order number, customer purchase order number, request date, or order amount.

In the Shipment Delivery Status workspace component, you can click the Personalize icon to specify the default delivery date in terms of *X* days from today, where *X* is the number of days that you specify. The system uses the number that you specify to determine when to provide you with alerts for deliveries that are due, past due, and pending.

Overview of Customer Self-Service

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

Customer Self-Service allows you to search for sales orders, inventory, online invoices, shipments, forecasts, and accounts receivable information, and displays alerts to inform you when a delivery is due or when a payment is past due.

You access all Customer Self-Service applications through the J.D. Edwards Customer Portal workspace. The J.D. Edwards Customer Portal workspace contains various components that enable you to access certain applications in different ways. For example, you might choose the appropriate task, search for specific information before accessing the application, or receive alerts that you can use to access the application.

Before You Begin

- ❑ Review *Working with User Administration* in the *Customer Self-Service Guide*

Reviewing Sales Order and Status Information

Customers can 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 cannot modify any order information.

The enterprise (the company that uses J.D. Edwards software) is responsible for setting the processing options for the Self Service - Sales Order Inquiry program (P4210SS). The processing options control information such as the following:

- 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.

► To review sales order and status information

From the Customer Self-Service Portal workspace, use one of the following navigations:

In the Tasks workspace component, choose View Orders and then complete the advanced search information.

In the Search workspace component, enter Orders by xxx (where xxx represents the order types that the enterprise defined in the processing options, such as Orders by Customer PO No.) in the Search field, enter a value in the adjacent field, and then click Go.

In the Search workspace component, enter Orders in the Advanced Search field, click Go, and then complete the advanced search information.

In the Customer Order Status Alerts workspace component, click the value in the Held Orders field.

1. If the enterprise set the processing option to display order header information, the View Order Header form appears, and you can review the following fields for each sales order number:
    - Sales Order Number
    - Order Type
    - Ship To
    - Request Date
    - Total Amount
    - Currency
    - Customer PO Number
    - Held Reason

    If the enterprise set the processing option to display order detail information, the View Order Detail form appears.

2. On either View Order Header or View Order Detail, to review detail information for a sales order, click the sales order number.
3. On View Order Detail, review the information on both the Order tab and Ship To Address tab.
4. For each line item on the sales order, review the following fields:
    - Order Quantity
    - Unit of Measure
    - Item Number
    - Item Description
    - Unit Price
    - Extended Price

- Shipment Number
- Ship To

5. To review detail information for a line item, click the line item number.
6. On View Item Detail, review the information in the Item, Price, Quantity, and Dates sections, and then click Close.
7. On View Order Detail, to review detail information for a shipment, click the shipment number.

   If the item has not been shipped yet, no shipment number appears.

8. On View Item Detail, review the shipment address information, and then click Close.
9. On View Order Detail, to review the amount that is due for a sales order line, click Account Info.
10. On View Account Information, review the amounts, and then click Close.
11. On View Order Detail, to review real-time estimated invoice amounts for a sales order, click On-line Invoice.
12. On View Sales Order Invoices, review the invoice information in the detail area.
13. To review tax information, click Tax Summary.
14. On View Invoice Tax Information by Authority, review the information and click Close.
15. On View Sales Order Invoices, to review discount information, click Discount Summary.
16. On View Invoice Discount Summary, review the information and click Close.
17. On View Sales Order Invoices, click Close.
18. On View Order Detail, click Close.

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

Defaults Tab

These processing options specify the default filter and sort options.

1. Order Filter Option

Use this processing option to specify the default filter option on the Advance Search form. You must specify a value from user define code (42B/FO).

2. Header Sort Option

Use this processing option to specify the default sort option on the View Order Header form. You must specify a value from the Sales Order Header Sort Option user defined code (42B/HS).

3. Detail Sort Option

Use this processing option to specify the default sort option on the View Order Detail form. You must specify a value from the user defined code table (42B/DS).

Display Tab

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

1. Display Header or Detail

Blank = Detail

1 = Header

Use this processing option to specify whether the system displays the View Order Header form or the View Order Detail form when you inquire on orders. Valid values are:

Blank

The system displays the search results on the View Order Detail form. The system searches the Sales Order Detail File (F4211); only detail search criteria are available on the Advanced Search form.

1

The system displays the search results on the View Order Header form. The system searches the Sales Order Header File (F4201); only header search criteria are available on the Advanced Search form.

2. Customer Item X-Reference

Use this processing option to 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 Item Master Information table (F4104) and create the cross-reference information in the Item Cross Reference Revisions program (P4104). If you leave this processing option blank, the system will not display cross-reference information. You must specify a value that has been set up in the user defined codes table (41/DT).

3. Type Code

Use this processing option to specify the type code of the who's who attention name that appears in the mailing address. If you leave this field blank, the system does not include the attention name line in the mailing address. You must specify a value that is set up in the Type Code user defined code (01/W0).

Process Tab

These processing options specify which order types the system processes.

1. Sales Order Types (Required)

Use this processing option to specify the order types (UDC 00/DT) that appear. 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)

Blank = Include
1 = Exclude

Future use.

Use this processing option to include or exclude the defined sales order types. Valid values are:

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

1
The system chooses records for which the order types are not equal to the sales order types.

3. Blanket Order Type

Use this processing option to specify the type of document for blanket sales orders. You must enter a value that is set up in the user defined code table (00/DT).

Versions Tab

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

1. Self-Service - Shipment Tracking (P4947S)

Use this processing option to 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)

Use this processing option to 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)

Use this processing option to specify the version of the Self-Service - Online Invoice Inqiury program (P42230) that the system uses to display billing information. If you leave this processing option blank, the system uses ZJDE0001.

Displaying Inventory Information for Customers

Both suppliers and customers can use self-service 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.

Before You Begin

- An administrator within the enterprise sets the appropriate processing options in the Self-Service - Inventory Information Inquiry program (P41204) 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 Item Cross Reference File table (F4104) that the system uses when it searches for inventory information.

► To display inventory information for customers

From the Customer Self-Service Portal workspace, use one of the following navigations:

In the Tasks workspace component, choose View Inventory Availability and complete the advanced search information.

In the Search workspace component, enter Inventory in the Advanced Search field, click Go, and complete the advanced search information.

1. On View Inventory Information, refine the information that you want to view by choosing the appropriate view option.

   You can also choose whether you want to view summary or detail information.

2. When you are finished, click Refresh.

   The summary mode shows quantities summarized by item level. The detail mode shows quantities at the item or branch level.

3. Review the following fields:

   - Item Number
   - Item Description
   - Unit of Measure
   - Branch
   - Quantity Available

   If the Quantity Available field appears in red, an inventory shortage exists.

4. When you are finished reviewing the information, click Close.

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

Defaults Tab

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

1. Display Option

Blank = In Summary Mode

0 = In Summary Mode

1 = In Detail Mode

Use this processing option to specify how the system displays records and quantities for the default display option. Valid values are:

Blank or 1

The system displays records in summary mode and quantities at the item level.

2

The system displays records in detail mode and quantities at the item/branch level.

2. Supplier View Option

Use this processing option to specify the default view option for the supplier. Valid 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

Use this processing option to specify the default view option for the customer. Valid values are:

01

Display all items.

02

Display only the items with a available quantity greater than zero.

Process Tab

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

1. Supplier Cross-Reference Type

Use this processing option to specify the cross reference type code (UDC 41/DT) by which the system searches for cross reference information for a supplier item number. Cross references associate your internal item numbers with the supplier's item numbers. You can set up items in the Item Master table (F4101) 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 and process any cross reference information.

2. Customer Cross-Reference Type

Use this processing option to specify the Cross Reference Type code (UDC 41/DT) by which the system searches for cross reference information for a customer item number. Cross references associate your internal item numbers with the customer's item numbers. You can set up items in the Item Master table (F4101) 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 and process any cross reference information.

3. Supplier Search Type

Use this processing option to specify the search type for the supplier. If you leave this processing option blank, the system uses search type V.

4. Customer Search Type

Use this processing option to specify the search type for the customer. If you leave this processing option blank, the system uses a search type of C.

Reviewing Online Invoice Information

Customers can use self-service to review invoice information, such as summaries of discount and tax information, within the enterprise (the company that uses J.D. Edwards software). Reviewing invoice information helps the customer identify and communicate discrepancies to the enterprise.

Before You Begin

- ❑ The enterprise must have invoiced the customer’s sales orders in the Sales Order Management system.
- ❑ The enterprise must set the appropriate processing option in the Online Invoice Inquiry program (P42230) to activate Customer Self-Service capabilities.

► To review online invoice information

From the Customer Self-Service Portal workspace, use one of the following navigations:

In the Tasks workspace component, choose View Invoices via Orders and complete the advanced search information, which involves entering a sales order number or customer purchase order number.

In the Search workspace component, enter Invoices by Sales Order No. or Invoices by Sales Invoice No. in the Search field, enter a sales order number or invoice number, and then click Go.

In the Search workspace component, enter Invoices in the advanced search list, click Go, and then complete the advanced search information, which involves entering a sales invoice number, a sales order number, or both.

Depending on the navigation that you use, the system displays either the View Order Detail form or the View Sales Order Invoices form.

1. On View Order Detail, click the sales order number for which you want to review online invoice information.
2. On View Order Detail, click On-line Invoice.
3. On View Sales Order Invoices, review the following fields and the invoice total at the bottom of the form:
   - Description
   - Unit of Measure
   - Quantity
   - Extended Price
   - Taxable
   - Order Number
   - Order Type
   - Invoice Date
4. To review tax information, click Tax Summary.
5. On View Invoice Tax Information by Authority, review the following fields, and then click Close:
   - Tax Authority
   - Tax Rate
   - Factor
   - Taxable Amount
   - Tax Amount

   The system displays the View Sales Order Invoice form.
6. On View Sales Order Invoice, click Discount Summary.
7. On View Invoice Discount Summary, review the following fields, and then click Close:
   - Description
   - Extended Price
   - Discount
   - Discount Price

   The system displays the View Sales Order Invoices form.

8. On View Sales Order Invoices, click Close.

Processing Options for Online Invoice Inquiry (P42230)

Defaults

Enter the default Order Type:

1. Order Type

Enter the From Status:

2. Status Code - From

Enter the Thru Status:

3. Status Code - Thru

Based on Status (1 = Last, default is Next):

4. Based On Status

Include/Exclude Backorders:
(1 = Exclude Backorders
2 = Include Backorders, Quantities Only
3 = Include Backorders, Quantities and Prices)

5. Backorders
6. Customer Self Service Functionality

Blank = Bypass Customer Self Service
1 - Activate Customer Self Service Functionality for use in JAVA/HTML

Freight

1. Process Freight Estimate
<Blank> = Do not display freight estimate.
1 = Display freight estimate.

Versions

1. Enter version for Print Invoices(FUTURE)

Commissions

1. Bypass Commission Processing

Blank = Process Commissions

1 = Do not Process Commissions

Tracking Shipments

Both customers and suppliers can use self-service 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.

Before You Begin

- The enterprise 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 Sales Order Entry program (P4210) to use.
- The customer can click the Personalize icon in the Shipment Tracking workspace component to specify a new default date that the system uses for the date categories (due, past due, and pending). The customer can save the modifications, and the system saves the information for future sessions. The customer can also cancel the modifications to return to the default settings that are defined by the enterprise.

See Also

- *Personalizing Customer Self-Service* in the *Customer Self-Service Guide*

► To review shipment detail information

From the Customer Self-Service Portal workspace, use one of the following navigations:

In the Tasks workspace component, choose Track Shipments, and then complete the advanced search information.

In the Search workspace component, enter Shipments by Shipment No. in the Search field, enter a shipment number, and then click Go.

In the Search workspace component, enter Shipments in the Advanced Search field, click Go, and then complete the advanced search information.

In the Shipment Delivery Status workspace component, click the value in the Deliveries Due, Deliveries Past Due, or Deliveries Pending field.

In the Shipment Tracking workspace component, click Review Shipment Status, enter a shipment number in the Shipment Number field, and then click Go.

1. On View Shipments, click the shipment number.
2. On View Shipment Detail, to review freight information for the shipment, click the Shipment Information tab.
3. To review information about shipment and delivery dates and times, click the Date and Time tab.
4. To review the address for the recipient of the shipment, click the Ship To Address tab.

   Note that you can review order detail information by choosing a sales order number in the detail area of the View Shipment Detail form.

5. To return to the Customer Self-Service Portal workspace, click Close.
6. On View Shipments, click Close.

► To review shipment tracking information

From the Customer Self-Service Portal workspace, use one of the following navigations:

In the Tasks workspace component, choose Track Shipments, and then complete the advanced search information.

In the Search workspace component, enter Shipments by Shipment No. in the Search field, enter a shipment number, and then click Go.

In the Search workspace component, enter Shipments in the Advanced Search field, click Go, and then complete the advanced search information.

In the Shipment Tracking workspace component, click Review Shipment Status, enter a shipment number in the Shipment Number field, and then click Go to access the View Shipment Detail form. To access the external carrier tracking system, choose Track Shipment with Carrier, enter a shipment number, and click Go.

1. On View Shipments, click the shipment number.
2. On Shipment Detail, click the Shipment Information tab.

   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.

3. Review the following fields, and then click Close:
   - Carrier
   - Mode of Transport
   - Freight Handling Code
   - Freight Charge

► **To review routing information for shipments with multiple routes**

From the Customer Self-Service Portal workspace, in the Shipment Delivery Status workspace component, click the value in the Deliveries Due, Deliveries Past Due, or Deliveries Pending field.

1. On View Shipments, complete the following field:
   - Track With Carrier

   If you choose an external carrier, the system accesses the tracking system of the external carrier.

2. On View Shipment Routes, choose a routing step.
3. On View Routing Detail, review the information in the Route Information section and the Date and Time section, and then click Close.
4. On View Shipment Routes, click Close.
5. On View Shipments, click Close.

Processing Options for Self-Service Shipment Tracking (P4947S)

Default Tab

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

1. Shipment Status From (Required)

Use this processing option to specify the lowest shipment status (UDC 49/SS) in a range of shipment statuses. The system uses the shipment status to display the list of shipments.

2. Shipment Status Thru (Required)

Use this processing option to specify the highest shipment status (UDC 49/SS) in the range of shipment statuses that the system uses to display the list of shipments.

3. Sorting Option (Required)

Use this processing option to specify the default sorting order code (UDC 49/SB) that the system applies to the list of shipments.

Display Tab

These processing options specify how the system displays information.

1. Customer Cross-Reference Type

Use this processing option to specify the code (UDC 41/DT) that the system uses when searching cross-reference information for a customer item number. Cross-references associate internal item numbers with the customer's item numbers. You can set up items in the Item Master table (F4101) and then create the cross-reference information in the Item Cross Reference program (P4104).

If you leave this processing option blank, the system will not display and process any cross-reference information.

2. Supplier Cross-Reference Type

Use this processing option to specify the code (UDC 41/DT) that the system uses when searching for cross-reference information for a supplier item number. Cross-references associate internal item numbers with the supplier's item numbers. You can set up items in the Item Master table (F4101) and then create the cross-reference information in the Item Cross Reference program (P4104).

If you leave this processing option blank, the system does not display and process any cross-reference information.

3. Type Code

Use this processing option to specify the Type Code (UDC 01/W0) for the Who's Who attention name that appears in the mailing address.

Versions Tab

These processing options specify the version of Self-Service - Sales Order Inquiry program (P4210SS) that the system uses.

1. Self-Service Sales Order Inquiry (P4210SS)

Use this processing option to determine 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.

Reviewing Accounts Receivable Information

Customers can use self-service to review accounts receivable 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 enterprise (the company that uses J.D. Edwards software).

► **To review accounts receivable information**

From the Customer Self-Service Portal workspace, use one of the following navigations:

In the Tasks workspace component, choose View Account Information.

In the Search workspace component, enter Accounts by Invoice No. in the Search field, enter an invoice number in the subsequent field, and then click Go.

In the Search workspace component, enter Account Information in the Advanced Search field, click Go, and then complete the advanced search information.

In the Receivables Status workspace component, click the value in the Past Due or Reminders Sent field.

1. On View Account Information, refine the information that the system displays by choosing the appropriate view and sort options.
2. When you are finished, click Refresh.
3. To review invoice details, click the invoice number in the detail area.
4. On Account Information Detail, review the information on the Invoice Details tab, Amounts tab, and Dates tab.
5. To review receipt information, click View Receipts.

   Note
   If the invoice does not have any receipt information, the system does not display the View Receipts option.

6. On View Customer Receipts, review the information, and then click Close.
7. On Account Information Detail, click Close.
8. On View Account Information, to review sales order detail information, click the sales order number in the detail area.

   If no detail information exists for the sales order, the system displays a message. If detail information exists, the system displays the View Order Detail form.

9. On View Order Detail, review the information on the Order tab and Ship To Address tab, and then click Close.
10. On View Account Information, click Close.

Processing Options for Self-Service - Customer Account Inquiry (P03B2003)

Defaults

1. Invoice Search Filter

Blank = 01

2. Invoice Sort Order

Blank = 01

Versions

1. Self Service - Sales Order Inquiry (P4210SS) Version

Blank = Use ZJDE0001

2. Online Invoice Inquiry (P42230) Version

Blank = Use ZJDE0001

Displaying Credit Status and Analysis

A customer can use self-service to review credit information such as account aging details, account balances, and account payment statuses. The customer can review this information at any time, or the customer might receive an alert that prompts a review. By reviewing this information, the customer can maintain credit status information and identify discrepancies within the Accounts Receivable system of the enterprise (the company that uses J.D. Edwards software).

Before You Begin

- ❑ The enterprise must define the credit-check level in the Customer Master program (P03013).
- ❑ The enterprise can review the types of information that the Display Credit Status and Analysis feature provides by accessing the Credit Check program (P42050) in the Sales Order Management system.

► To review account balance information

From the Customer Self-Service Portal workspace, access the Account Balance workspace component.

Review the information in the following fields:

- Currency
- Amount Due
- Amount on Open Orders
- Total Credit Balance
- Credit Limit
- Credit Available

► To review account payment summary status information

From the Customer Self-Service Portal workspace, access the Payment Summary workspace component.

Review the following fields:

- Currency

- Average Days Late
- % of Amount Paid Late
- Date of First Invoice
- Date of Last Invoice
- Date Last Paid
- Amount Invoiced this Year
- Amount Invoiced Prior Year
- Last Applied Amount

► To review account aging information

From the Customer Self-Service Portal workspace, access the Account Aging workspace component.

1. Review the aging fields that the enterprise has set up, such as the following:

- Future
- Current
- 1 - 30
- 31 - 60
- 61 - 90
- 91 - 120
- 121 – 150
- 151 – 999
- Over 999

   The numeric fields above refer to date ranges. For example, 1 – 30 refers to a range between 1 and 30 days, beginning with today's date or whichever date has been entered in the Change Aging Date field.

2. To change the aging date, enter a new date in the Change Aging Date field, and then click Go.

   The system refreshes the aging information in the Account Aging workspace component.

Working with Forecasts

Suppliers can use self-service to provide customers (also known as planners) with personalized forecast information. The customer can review the forecast information, compare it to schedules, modify the forecast information as necessary, and add new forecasts. By reviewing and responding to forecasts, the customer helps the supplier to generate realistic forecasts, thereby increasing customer satisfaction in the future.

Before You Begin

- The enterprise must set the ABC Code Sales Value to A in the customer master information in J.D Edwards 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 enterprise 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 enterprise can also use processing options to specify different forecast types and the unit of measure in which the system displays forecasts.

► To review forecast information

From the Customer Self-Service Portal workspace, use one of the following navigations:

In the Tasks workspace component, choose Manage Forecasts and complete the advanced search information.

In the Search workspace component, enter Forecasts by Item No. in the Search field, enter an item number in the subsequent field, and then click Go.

In the Search workspace component, enter Forecasts in the Advanced Search field, click Go, and then complete the advanced search information.

1. On View Available Items/Branches, click View in the Detail Forecast field for the item that you want to review.
2. On View Forecast Information, review the following fields, and then click Close:
    - Request Date
    - Forecast Quantity
    - Forecast Amount
    - Original Quantity
    - Original Amount
3. On View Available Items/Branches, click Close.

► To modify forecast information

From the Customer Self-Service Portal workspace, use one of the following navigations:

In the Tasks workspace component, choose Manage Forecasts and complete the advanced search information.

In the Search workspace component, enter Forecasts by Item No. in the Search field, enter an item number in the subsequent field, and then click Go.

In the Search workspace component, enter Forecasts in the Advanced Search field, click Go, and then complete the advanced search information.

1. On View Available Items/Branches, click Edit in the Detail Forecast field for the item that you want to modify.
2. On Edit Forecast Information, complete the following fields:
   - Forecast Quantity
   - Forecast Amount
3. To update the forecast information in the enterprise system, click Submit.

   The system updates the forecast, sends an electronic message to the planner's work center (without workflow approval or rejection), and then displays the View Available Items/Branches form.
4. On View Available Items/Branches, click Close.

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

Display Tab

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

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1. Forecast Type (Required)

Use this processing option to specify the forecast type (UDC 34/DF) that the system displays.

2. Unit of Measure
Blank = Primary Unit of Measure
1= Pricing Unit of Measure
2 = Shipping Unit of Measure

Use this processing option to specify the unit of measure that the system uses. Valid values are:

Blank
Use the primary unit of measure from the Item Master table (F4101).

1
Use the pricing unit of measure from the Item Master table.

2
Use the shipping unit of measure.

Process Tab

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

1. Edit Mode

Blank = Do not allow user to edit the forecasts.

1 = Allow user to edit the generated forecasts only.

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

3 = Allow user to edit the generated forecasts and add new forecasts to any date.

Use this processing option to specify the type of forecast action is performed. Valid 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

Use this processing option to indicate the date from which the user is allowed to enter new forecasts. The system looks at this date only if the Edit Mode processing option values is 2.

3. User-Defined Thru Date

Use this processing option to indicate the date through which the user is allowed to enter new forecasts. The system looks at this date only if the Edit Mode processing option values is 2.

4. Customer Cross Reference Type

Use this processing option to specify the code with which the system searches cross-reference information using a customer item number. Cross-references associate your internal item numbers with the customer's item numbers. You can set up items in Item Master Information (F4101) and create the cross-reference information in Item Cross Reference Revisions program (P4104). You must enter a value that has been set up in 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 code with which the system searches cross-reference information using a customer item number. Cross-references associate your internal item numbers with the customer's item numbers. You can set up items in Item Master Information (F4101) and create the cross-reference information in the Item Cross Reference Revisions program (P4104). You must enter a value that has been set up in UDC 41/DT. If you leave this processing option blank, the system does not display and process any cross-reference information.

Interop Tab

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

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1. Transaction Type

Use this processing option to specify the transaction type that the system uses for export processing. You must choose a valid transaction type from UDC 00/TT. If you leave this processing option blank, the system does not perform export processing.

2. Before/After Image Processing

Blank = The system writes after image only.

1 = The system writes both before and after images.

Use this processing option to determine whether the system writes before and after images for export processing. Valid values are:

Blank

Write after images only.

1

Write both before and after images.

Managing Customer Information

Customers can use self-service to review and modify address book information, including mailing name, address, telephone number, e-mail address, and Web contacts.

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.

► To modify customer name and address information

From the Customer Self-Service Portal workspace, in the Tasks workspace component, choose Manage Customer Information.

1. On View User Information, review the User Name, Corporate Address, and Corporate Contact Information sections.
2. To modify user name information, click Edit in the User Name group box.
3. On Edit User Name, complete the following fields, and then click Submit:
    - Primary Mailing Name
    - Secondary Mailing Name

The system saves the information.

4. On View User Information, to modify address information, click Edit in the Corporate Address group box.
5. On Edit User Address, complete the following fields, and then click Submit:
   - Address Line 1
   - Address Line 2
   - Address Line 3
   - City
   - State
   - Postal Code
   - County
   - Country

   The system saves the information.

► To modify customer corporate contact information

From the Customer Self-Service Portal workspace, in the Tasks workspace component, choose Manage Customer Information.

1. On View User Information, click Edit in the Corporate Contact Information group box.
2. On Edit Corporate Contact Information, complete the following fields:
   - Business Line
   - Facsimile Line
   - Email Address
   - WWW Address
3. To modify secondary telephone and facsimile numbers, click Edit Entire Phone List.
4. On Edit Entire Phone List, complete the following fields:
   - Phone Type Code
   - Prefix
   - Phone Number
5. To delete a telephone or facsimile number, click the following option, and then click the Delete button.
   - Delete Row
6. To save the telephone and facsimile modifications, click Submit.
7. On Edit Corporate Contact Information, to modify Internet contacts, click Edit Entire Web Contact List.
8. On Edit Entire Web Contact List, complete the following fields:
   - Address Type Code
   - Electronic Address

9. To delete a Web contact, click the following option, and then click the Delete button.
    - Delete Row
10. To save the Web contact modifications, click Submit.
11. On Edit Corporate Contact Information, click Cancel.
12. On View User Information, click Close.

► To review additional customer information

From the Customer Self-Service Portal workspace, in the Tasks workspace component, choose Manage Customer Information.

1. On View User Information, click View Additional Information.
2. On Customer Master Information, review the following fields:
    - Payment Terms
    - Alternate Payor
    - Parent
    - Send Invoice to
    - Date Account Opened
    - Send Statement to
    - Currency Code
    - Credit Limit
    - Minimum Order Value
    - Maximum Order Value
    - Delivery Instructions
    - Freight Handling Code
    - Tax ID Type
    - Tax ID
    - Add'l Ind Tax ID
    - Tax Expl Code
3. To request a credit limit change, click Request Credit Limit Change.

    The system sends an electronic message to the credit manager.
4. To return to View User Information, click Close.
5. On View User Information, click Close.

Processing Options for Self-Service Change Address Book Information (P01012SS)

Types

Business Phone Number Type
Facsimile Phone Number Type
Email Type
URL Type