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JD Edwards EnterpriseOne Customer Relationship Management Application Fundamentals 9.0 Implementation Guide

September 2008

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JD Edwards EnterpriseOne Customer Relationship Management Application Fundamentals 9.0 Implementation Guide
SKU e190ACF-B 0908

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About This Documentation Preface

JD Edwards EnterpriseOne implementation guides provide you with the information that you need to implement and use JD Edwards EnterpriseOne applications from Oracle.

This preface discusses:

• JD Edwards EnterpriseOne application prerequisites.

• Application fundamentals.

• Documentation updates and downloading documentation.

• Additional resources.

• Typographical conventions and visual cues.

• Comments and suggestions.

• Common fields in implementation guides.

Note. Implementation guides document only elements, such as fields and check boxes, that require additional explanation. If an element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common fields for the section, chapter, implementation guide, or product line. Fields that are common to all JD Edwards EnterpriseOne applications are defined in this preface.

JD Edwards EnterpriseOne Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use JD Edwards EnterpriseOne applications.

You might also want to complete at least one introductory training course, if applicable.

You should be familiar with navigating the system and adding, updating, and deleting information by using JD Edwards EnterpriseOne menus, forms, or windows. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your JD Edwards EnterpriseOne applications most effectively.

Application Fundamentals

Each application implementation guide provides implementation and processing information for your JD Edwards EnterpriseOne applications.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals implementation guide. Most product lines have a version of the application fundamentals implementation guide. The preface of each implementation guide identifies the application fundamentals implementation guides that are associated with that implementation guide.

The application fundamentals implementation guide consists of important topics that apply to many or all JD Edwards EnterpriseOne applications. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals implementation guides. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Downloading Documentation

This section discusses how to:

• Obtain documentation updates.

• Download documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on Oracle's PeopleSoft Customer Connection website. Through the Documentation section of Oracle's PeopleSoft Customer Connection, you can download files to add to your Implementation Guides Library. You'll find a variety of useful and timely materials, including updates to the full line of JD Edwards EnterpriseOne documentation that is delivered on your implementation guides CD-ROM.

Important! Before you upgrade, you must check Oracle's PeopleSoft Customer Connection for updates to the upgrade instructions. Oracle continually posts updates as the upgrade process is refined.

See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

Downloading Documentation

In addition to the complete line of documentation that is delivered on your implementation guide CD-ROM, Oracle makes JD Edwards EnterpriseOne documentation available to you via Oracle's website. You can download PDF versions of JD Edwards EnterpriseOne documentation online via the Oracle Technology Network. Oracle makes these PDF files available online for each major release shortly after the software is shipped.

See Oracle Technology Network, http://www.oracle.com/technology/documentation/psftent.html

Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps

Resource	Navigation
Interactive Services Repository	Support, Documentation, Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Pre-Built Integrations for PeopleSoft Enterprise and JD Edwards EnterpriseOne Applications
Minimum technical requirements (MTRs)	Implement, Optimize + Upgrade; Implementation Guide; Supported Platforms
Documentation updates	Support, Documentation, Documentation Updates
Implementation guides support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Release Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

• Typographical conventions.

• Visual cues.

• Country, region, and industry identifiers.

• Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in implementation guides:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and JD Edwards EnterpriseOne or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.
" " (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

Implementation guides contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the JD Edwards EnterpriseOne system.

Note. Example of a note.

If the note is preceded by *Important!,* the note is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Cross-References

Implementation guides provide cross-references either under the heading "See Also" or on a separate line preceded by the word *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: "(FRA) Hiring an Employee"

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in implementation guides:

• Asia Pacific

• Europe

• Latin America

• North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in implementation guides:

• USF (U.S. Federal)

• E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about implementation guides and other Oracle reference and training materials. Please send your suggestions to your product line documentation manager at Oracle Corporation, 500 Oracle Parkway, Redwood Shores, CA 94065, U.S.A. Or email us at appsdoc@us.oracle.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Fields Used in Implementation Guides

Address Book Number	Enter a unique number that identifies the master record for the entity. An address book number can be the identifier for a customer, supplier, company, employee, applicant, participant, tenant, location, and so on. Depending on the application, the field on the form might refer to the address book number as the customer number, supplier number, or company number, employee or applicant ID, participant number, and so on.
As If Currency Code	Enter the three-character code to specify the currency that you want to use to view transaction amounts. This code enables you to view the transaction amounts as if they were entered in the specified currency rather than the foreign or domestic currency that was used when the transaction was originally entered.
Batch Number	Displays a number that identifies a group of transactions to be processed by the system. On entry forms, you can assign the batch number or the system can assign it through the Next Numbers program (P0002).
Batch Date	Enter the date in which a batch is created. If you leave this field blank, the system supplies the system date as the batch date.
Batch Status	Displays a code from user-defined code (UDC) table 98/IC that indicates the posting status of a batch. Values are:
	Blank: Batch is unposted and pending approval.
	A: The batch is approved for posting, has no errors and is in balance, but has not yet been posted.
	D: The batch posted successfully.
	E: The batch is in error. You must correct the batch before it can post.

P: The system is in the process of posting the batch. The batch is unavailable until the posting process is complete. If errors occur during the post, the batch status changes to *E*.

U: The batch is temporarily unavailable because someone is working with it, or the batch appears to be in use because a power failure occurred while the batch was open.

Branch/Plant

Enter a code that identifies a separate entity as a warehouse location, job, project, work center, branch, or plant in which distribution and manufacturing activities occur. In some systems, this is called a business unit.

Business Unit

Enter the alphanumeric code that identifies a separate entity within a business for which you want to track costs. In some systems, this is called a branch/plant.

Category Code

Enter the code that represents a specific category code. Category codes are user-defined codes that you customize to handle the tracking and reporting requirements of your organization.

Company

Enter a code that identifies a specific organization, fund, or other reporting entity. The company code must already exist in the F0010 table and must identify a reporting entity that has a complete balance sheet.

Currency Code

Enter the three-character code that represents the currency of the transaction. JD Edwards EnterpriseOne provides currency codes that are recognized by the International Organization for Standardization (ISO). The system stores currency codes in the F0013 table.

Document Company

Enter the company number associated with the document. This number, used in conjunction with the document number, document type, and general ledger date, uniquely identifies an original document.

If you assign next numbers by company and fiscal year, the system uses the document company to retrieve the correct next number for that company.

If two or more original documents have the same document number and document type, you can use the document company to display the document that you want.

Document Number

Displays a number that identifies the original document, which can be a voucher, invoice, journal entry, or time sheet, and so on. On entry forms, you can assign the original document number or the system can assign it through the Next Numbers program.

Document Type

Enter the two-character UDC, from UDC table 00/DT, that identifies the origin and purpose of the transaction, such as a voucher, invoice, journal entry, or time sheet. JD Edwards EnterpriseOne reserves these prefixes for the document types indicated:

P: Accounts payable documents.

R: Accounts receivable documents.

T: Time and pay documents.

I: Inventory documents.

O: Purchase order documents.

S: Sales order documents.

Effective Date

Enter the date on which an address, item, transaction, or record becomes active. The meaning of this field differs, depending on the program. For example, the effective date can represent any of these dates:

- The date on which a change of address becomes effective.
- The date on which a lease becomes effective.
- The date on which a price becomes effective.
- The date on which the currency exchange rate becomes effective.
- The date on which a tax rate becomes effective.

Fiscal Period and **Fiscal Year**

Enter a number that identifies the general ledger period and year. For many programs, you can leave these fields blank to use the current fiscal period and year defined in the Company Names & Number program (P0010).

G/L Date (general ledger date)

Enter the date that identifies the financial period to which a transaction will be posted. The system compares the date that you enter on the transaction to the fiscal date pattern assigned to the company to retrieve the appropriate fiscal period number and year, as well as to perform date validations.

JD Edwards EnterpriseOne CRM Application Fundamentals Preface

This preface discusses:

• JD Edwards EnterpriseOne products.

• Common fields used in this implementation guide.

JD Edwards EnterpriseOne Products

This implementation guide refers to these JD Edwards EnterpriseOne products:

• JD Edwards EnterpriseOne Address Book

• JD Edwards EnterpriseOne CRM Foundation

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.

Common Fields Used in This Implementation Guide

Address Type	Enter the code that tells the system to use this address as a sold to (bill to) address, a ship to address, or both. Codes are:
	X: Bill to and ship to address
	S: Ship to address only
	B: Bill to address only
City	Enter the name of the city associated with the address.
Country	Enter the user-defined code (00/CN) that identifies a country. The country code has no effect on currency conversion. The Address Book system uses the country code for data selection and address formatting.
County	Enter the name of a the contact's county, parish, or other political district if necessary for address or tax purposes.
Currency Code	Displays the code that identifies the currency for the transaction, opportunity, or sales order.
Electronic Address	Enter the customer's email address or Uniform Resource Locator (URL).

> **Note.** For Electronic Address Type W - Internal email (Work Center), the Electronic Address field must be blank.

Electronic Address Type	Enter the user-defined code (system 01, type ET) that describes the type of electronic address. Values are:
	E: Email address such as name@domain
	I: Internet address URL (Uniform Resource Locator)
	W: Internal address (Work Center)
Postal Code	Enter the United States ZIP code or the postal code that specifies where a letter should be routed.
Phone Number	Enter the telephone number, excluding the phone prefix or special characters such as hyphens or periods. When you search for an address using a phone number, you must enter the number exactly as it is set up in the Address Book system, including any special characters.
Phone Prefix	Enter the first telephone number's first segment, such as the three-digit area code used in United States.
State	Enter the user-defined code (system 00, type S) that identifies the state or province. This code is usually a postal service abbreviation.
Title	Enter the professional title of the contact as entered in the Who's Who table.

CHAPTER 1

Getting Started with JD Edwards EnterpriseOne Customer Relationship Management Application Fundamentals

This chapter discusses:

- JD Edwards EnterpriseOne CRM application fundamentals overview.
- JD Edwards EnterpriseOne CRM Foundation business processes.
- JD Edwards EnterpriseOne CRM Foundation integrations.
- JD Edwards EnterpriseOne CRM Foundation implementation.

JD Edwards EnterpriseOne CRM Application Fundamentals Overview

This guide discusses the JD Edwards EnterpriseOne Customer Relationship Management Foundation system from Oracle, and how the applications in this system provide the basis for all customer relationship management (CRM) business processes that the organization uses. To use any of the JD Edwards EnterpriseOne Customer Relationship Management products, including JD Edwards EnterpriseOne Sales Force Automation, JD Edwards EnterpriseOne Case Management, and JD Edwards EnterpriseOne Service Management, you must also use the JD Edwards EnterpriseOne Customer Relationship Management Foundation system.

You can use the JD Edwards EnterpriseOne Customer Relationship Management Foundation system to perform these tasks:

- Set up CRM constants, which are used to determine how the system processes CRM information.
- Enter CRM information for employees, customers, contacts, and partners.

  You can enter and maintain employees, customers, contacts, and partners using CRM applications. You can also manage and maintain CRM information for employees, customers, and partners that were entered into the system using applications from other JD Edwards EnterpriseOne products.

- Enter and maintain product item and item catalogs, which can be used in sales, service, and support business processes.
- Set up email lists, and use email merge functionality to communicate similar information to large groups of people.
- Create call plans to assist service and support employees.

JD Edwards EnterpriseOne CRM Foundation Business Processes

The JD Edwards EnterpriseOne Customer Relationship Management Foundation system provides the basis for these business processes:
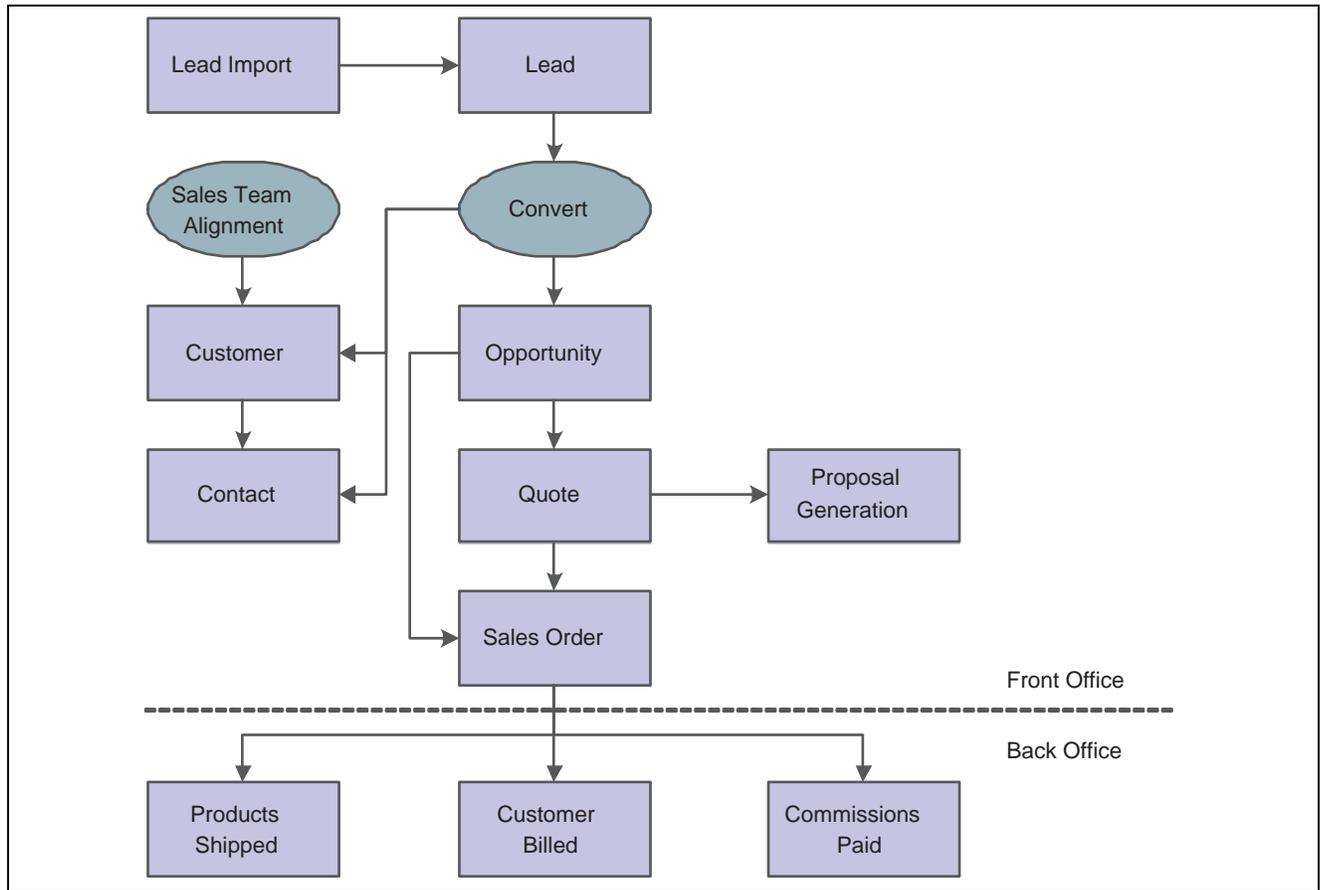
Lead to cash business process
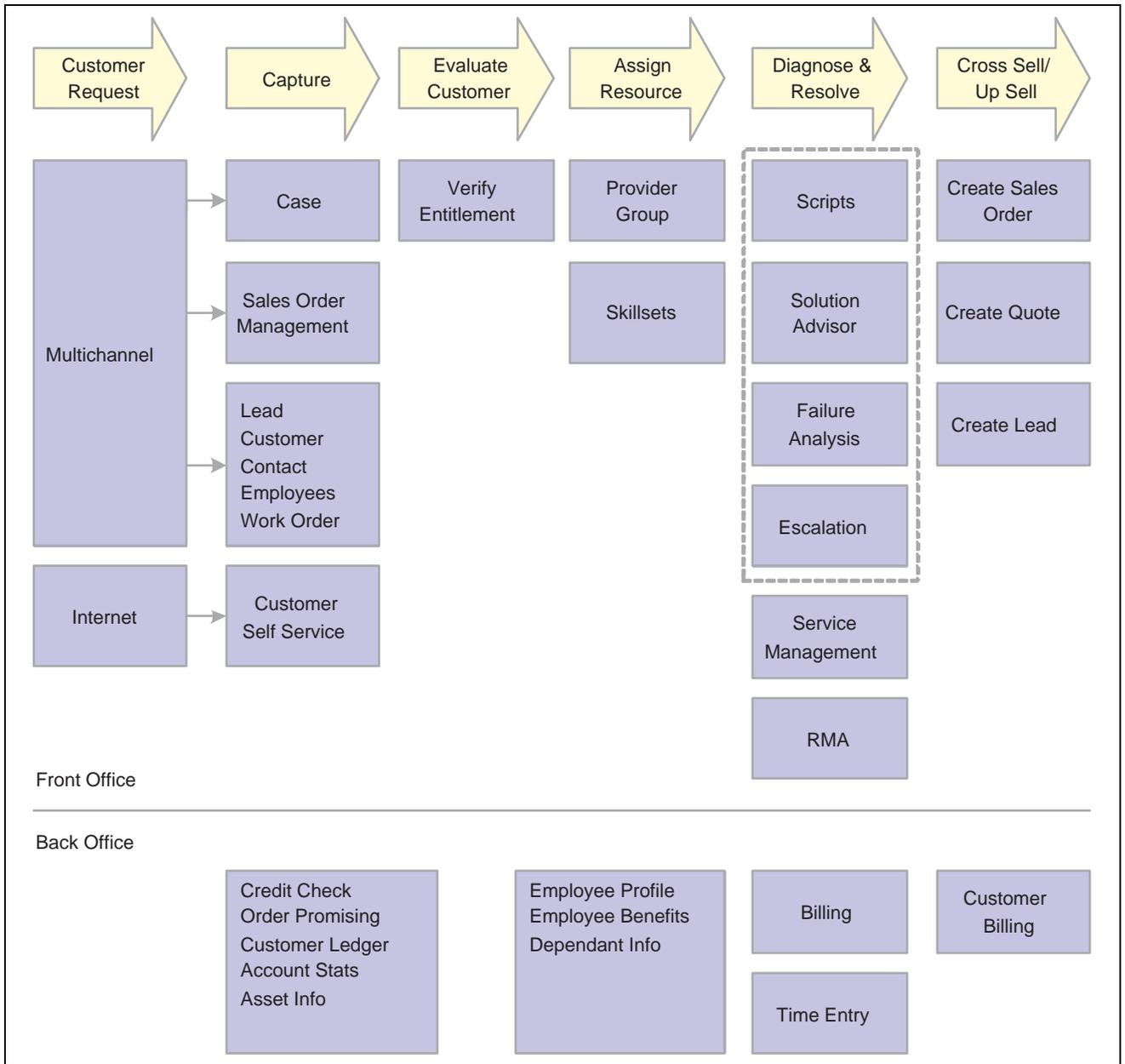
Request to resolve business process

JD Edwards EnterpriseOne CRM Foundation Integrations

The JD Edwards EnterpriseOne Customer Relationship Management Foundation system integrates with these JD Edwards EnterpriseOne systems from Oracle:

• JD Edwards EnterpriseOne Address Book.

• JD Edwards EnterpriseOne Customer Relationship Management systems.

JD Edwards EnterpriseOne Address Book

The JD Edwards EnterpriseOne Customer Relationship Management Foundation system integrates closely with the JD Edwards EnterpriseOne Address Book system. All employee, customer, contact, and partner records are stored in the JD Edwards EnterpriseOne Address Book system, whether they are entered using CRM applications or applications from other systems. Once the records reside in the JD Edwards EnterpriseOne Address Book system, you can access them from the CRM system and maintain and update CRM-related information.

JD Edwards EnterpriseOne Customer Relationship Management Systems

The JD Edwards EnterpriseOne Customer Relationship Management Foundation system provides the basis for these CRM systems:

• JD Edwards EnterpriseOne Branch Scripting.

• JD Edwards EnterpriseOne Case Management.

• JD Edwards EnterpriseOne Sales Force Automation.

• JD Edwards EnterpriseOne Service Management.

• JD Edwards EnterpriseOne Solution Advisor.

Before you can use any of these systems effectively, you must set up the JD Edwards EnterpriseOne Customer Relationship Management Foundation system, which includes setting up CRM constants and creating employee, customer, and item records.

JD Edwards EnterpriseOne CRM Foundation Implementation

This section provides an overview of the steps that are required to implement the JD Edwards EnterpriseOne Customer Relationship Management Foundation system.

In the planning phase of the implementation, take advantage of all JD Edwards EnterpriseOne sources of information, including the installation guides and troubleshooting information. A complete list of these resources appears in the preface in *About This Documentation* with information about where to find the most current version of each.

When determining which electronic software updates (ESUs) to install for JD Edwards EnterpriseOne CRM systems, 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 8.98 Software Update Guide*

For information about the Oracle Business Accelerator solution for implementation of JD Edwards EnterpriseOne CRM applications, review the documentation available.

See http://www.peoplesoft.com/corp/en/iou/implement/rapid_start/rapid_start_prtr_notes.jsp

Global Implementation Steps

This table lists the suggested global implementation steps for JD Edwards EnterpriseOne CRM systems:

Step	Reference
1. Set up global UDC tables.	*JD Edwards EnterpriseOne Tools 8.98 Foundation Guide*
2. Set up companies, fiscal date patterns, and business units.	*JD Edwards EnterpriseOne Financial Management Application Fundamentals 9.0 Implementation Guide*, "Setting Up Organizations"
3. (Optional) Set up accounts, and the chart of accounts.	*JD Edwards EnterpriseOne Financial Management Application Fundamentals 9.0 Implementation Guide*, "Creating the Chart of Accounts"
4. (Optional) Set up the General Accounting constants.	*JD Edwards EnterpriseOne General Accounting 9.0 Implementation Guide*, "Setting Up the General Accounting System"
5. (Optional) Set up multicurrency processing, including currency codes and exchange rates.	• *JD Edwards EnterpriseOne Multicurrency Processing 9.0 Implementation Guide*, "Setting Up General Accounting for Multicurrency Processing" • *JD Edwards EnterpriseOne Multicurrency Processing 9.0 Implementation Guide*, "Setting Up Exchange Rates"
6. (Optional) Set up ledger type rules.	*JD Edwards EnterpriseOne General Accounting 9.0 Implementation Guide*, "Setting Up the General Accounting System," Setting Up Ledger Type Rules for General Accounting
7. Set up branch/plant constants.	*JD Edwards EnterpriseOne Inventory Management 9.0 Implementation Guide*, "Setting Up the Inventory Management System"

JD Edwards EnterpriseOne CRM Foundation Implementation Steps

This table lists the implementation steps for JD Edwards EnterpriseOne CRM Foundation:

Step	Reference
1. Activate the CRM system.	Chapter 3, "Setting Up the CRM Foundation System," page 15
2. Set up CRM constants.	Chapter 3, "Setting Up the CRM Foundation System," page 15

CHAPTER 2

Understanding JD Edwards EnterpriseOne CRM Fundamentals

This chapter provides overviews of:

- JD Edwards EnterpriseOne Customer Relationship Management Products.
- JD Edwards EnterpriseOne CRM Fundamentals applications.
- CRM constants.
- Employees.
- Catalogs.
- Customers.
- Partners.
- Contacts.
- Call plans.
- Email and mail merge.
- Hotkeys for CRM Foundation.

Understanding JD Edwards EnterpriseOne Customer Relationship Management Products

JD Edwards EnterpriseOne Customer Relationship Management products are a set of customer life cycle management applications that enable you to create a complete view of each customer. These applications help you build strong relationships, which are the key to obtaining customer loyalty. JD Edwards EnterpriseOne Customer Relationship Management applications help you manage customer information in these ways:

- Sales Force Automation applications let you manage accounts, leads, contacts, opportunities and competitors; plan and execute sales strategies; and forecast more effectively.

  The ability to track and analyze all aspects of the sales cycle enables organizations to sell more effectively to each customer, which can lead to greater customer satisfaction.

- Case Management and Service Management applications enable you to track all aspects of each customer's service and support needs.

  Using cases and work orders, you can track and manage the specific details of each service or support request that customers initiate. You can also use additional Oracle systems to resolve cases and work orders efficiently, such as:

  - JD Edwards EnterpriseOne Solution Advisor

- JD Edwards EnterpriseOne Branch Scripting

The JD Edwards EnterpriseOne Sales Force Automation, JD Edwards EnterpriseOne Case Management, and JD Edwards EnterpriseOne Service Management systems from Oracle enable organizations to satisfy a customer's needs through all phases of these business processes:

• Sales Force Automation – Lead to Order.

• Case Management – Request to Resolve.

• Service Management – Install to Maintain.

To successfully complete these business processes, you must first set up the JD Edwards EnterpriseOne CRM Foundation system, which provides the basis for all CRM-related business processes in JD Edwards EnterpriseOne.

Understanding JD Edwards EnterpriseOne CRM Fundamentals Applications

The JD Edwards EnterpriseOne Customer Relationship Management applications help companies manage the entire customer life cycle, from acquiring new customers to post-sales service and support. The JD Edwards EnterpriseOne CRM Foundation system includes these features:

• Item entry, maintenance, and inquiry.

• Item cataloging.

• Contact entry and maintenance.

• Customer entry and maintenance.

• Employee entry and maintenance.

• Email and email merge functionality.

• Call plan creation and maintenance.

• Partner entry and maintenance.

The JD Edwards EnterpriseOne CRM Foundation applications are integrated with other JD Edwards EnterpriseOne applications, which reduces or eliminates redundant data entry. For example, customers, employees, and partners that are entered using the Address Book program (P01012) are accessible from CRM-related employee, customer, and partner applications. It is not necessary to reenter data into the system to create CRM records.

Understanding CRM Constants

Before you can process information using CRM applications, you must set up the CRM constants. Constants are used to specify how you want the system to process CRM-related information. The CRM_Constants program (P90CA000) provides the basis for all CRM applications.

Understanding Employees

You use the Employee Detail program (P90CA040) and the Employee Processing Options program (P90CA043) to enter and maintain all CRM-related information about employees. When you set up employees, you can enter sales, service, and support information that is used by the CRM applications.

Understanding Catalogs

The Item Catalog program (P90CA106) enables you to categorize items into similar groups, or catalogs. You can also use catalogs to add items to a sales order, quote, opportunity, or lead.

The Item Catalog program enables you to:

• Locate catalog items quickly.

• View catalog item information such as the item description, stocking type, unit of measure, product model, or product family.

• View a catalog item's list of features, availability, and base price.

• View the opportunities and partners associated with a catalog item.

• View catalogs in single select or multiple select mode.

• Associate an entire catalog to a lead, opportunity, quote, or sales order.

Understanding Customers

The CRM Customer Detail program (P90CA080) enables you to enter and modify all CRM-related customer information from one entry point. If a selected customer record has subordinate records, you can click the Parent Child Hierarchy link to view the parent and child records.

You use the CRM Customer Detail program to enter, review and maintain customer information, such as:

• Contacts, addresses and phones.

• Financial data.

• Shipping and billing options and preferences.

• Service and support information, including contracts, work orders, and maintenance requests.

• Sales information, including sales teams, quotes, sales orders, and opportunities.

• Activities and action plans.

Understanding Partners

You use the Address Book program (P01012) to enter partner information. A CRM-related version of this program exists on the CRM Foundation Daily Processing menu (G90C01), which enables you to easily access partner information while performing CRM-related tasks. After you create partner records, you can associate those partners with customers, employees, items, sales leads, cases, opportunities, or activities. Tracking partner information enables you to:

- View partners who are currently, or were previously associated with customers, employees, items, sales leads, cases, opportunities, or activities.

- View and assign partner contacts to cases, opportunities, or activities.

- Create and maintain partner detail information, including addresses, phones, contacts, notes and attachments.

Understanding Contacts

The CRM Contact program (P90CA070) enables you to track information about contact people who are associated with partners, customers, and competitors. Using the CRM Contact program, you can access the Email Merge and Mail Merge features, which enable you to create personalized letters or electronic messages for selected contacts. Before you can use either of these features, you must create at least one contact.

The CRM Contact program enables you to:

- View or modify detail information, such as addresses, phones and related people.

- View or modify activity and email information.

- View or modify opportunity, pipeline, quote, or sales order information.

- View or modify information about cases associated with the contact.

- Enter, view or modify attachments for the contact.

Understanding Call Plans

You can use the Activity (P01301) and Action Plan (P01401) programs to create call plans. Call plans provide sales representatives with templates that contain question prompts, goals, and reminders about the type of sales call on which they are working.

You can associate a call plan template with an activity or an action plan. When viewing the call plan form from either the activity or action plan, you can change the templates that are associated with the call plan. For example, when speaking with a customer you might think of additional questions you would like to ask that are specific to this customer. You can add the questions and save the updated template. When you save the changes, the system creates a copy of the original call plan template, and associates it with the activity or action plan. The original call plan template is not affected.

Understanding Email and Mail Merge

You use the Class Email program (P90CA500) to send email messages to groups or individuals without using a separate email program such as Microsoft Outlook or Lotus Notes. You can create and save messages to send at a later date and time, and you can select the recipients from available contact records.

You can also create email groups comprised of individuals with similar characteristics. For example, you might create groups for customers, partners, or employees in a department. As business needs change, you can modify email groups.

You can also use the Email Merge and Mail Merge features to create personalized letters or electronic messages. The mail merge feature is driven by a wizard that enables you to select a template and customize it for the mailing. These merge features enable you to create personalized communications that automatically retrieve information such as the recipient's name and address from the JD Edwards EnterpriseOne system.

Understanding Hotkeys for CRM Foundation

You can navigate and interact with JD Edwards EnterpriseOne applications using hotkeys for quicker, more efficient workflow. Hotkeys are designed to work in conjunction with the browser's existing hotkeys, and enable you to work solely using the keyboard.

There are several hotkeys that you can use to navigate through all JD Edwards EnterpriseOne applications. For example, you can hit the tab key on the keyboard to move the focus to the next field, button, or hotlink on any JD Edwards EnterpriseOne form. In addition to those hotkeys, additional hotkeys are available that enable you to use buttons on CRM Foundation forms without using the mouse. To use these hotkeys, you must hold down the Shift and the Control buttons on the keyboard while you press the hotkey. For example, N is the hotkey for the Clear Main Address button. To clear a customer's main address without clicking the Clear Main Address button, you press SHIFT + CTRL + N on the keyboard.

This table lists all of the CRM Foundation hotkeys:

Button	Hotkey
Add Email Group	D
Add External Email	L
Add Person	P
Assign City	N
Assign Competitors	N
Assign Industry	N
Assign Opportunity	N
Assign Partners	N
Assign Postal Code	N

Button	Hotkey
Assign Product Interest	N
Assign Sales Team	N
Assign State	N
Back	B
Change Upload	N
Clear Main Address	N
Collapse Hierarchy	Y
Convert Lead	N
Create Email	M
Delete Upload	D
Download Template	L
Email Merge	L
Email Selected Contacts	M
Expand Hierarchy	Y
Finish	N
Link Action Plan	L
Mail Merge	M
Next	N
No	N
Previous	P
Remove Email Group	U
Remove External Email	X
Remove Person	N
Revise	Y
Sales Group Details	L
Select Policy	P
Send Email	M

Button	Hotkey
Set Main Address	M
Upload Template	U
View Envelopes/Labels	B
View Letters	L
Yes	Y

See Also

JD Edwards EnterpriseOne Tools 8.98 Foundation Guide

CHAPTER 3

Setting Up the CRM Foundation System

This chapter discusses how to:

- Activate the CRM Foundation system.
- Set up CRM constants.

Activating the CRM Foundation System

This section provides an overview of system activation and discusses how to activate the CRM Foundation system.

Understanding System Activation

Before you can enter and process CRM data, you must activate the JD Edwards EnterpriseOne CRM Foundation system. The CRM Foundation system code is 90CA. To activate system 90CA, a record containing this data must exist in the F99410 table:

- The Data Item field contains *SY90CA*.
- The Use Module field contains *Yes*.

Important! If you do not create the SY90CA record in the F99410 table, CRM business functions and programs will not function properly. However, the system does not issue an error.

You can use either of these programs to create this record:

- R90CA170 (F99410 Activate CRM Foundation)

  The system creates the record automatically when you run this batch program. This program does not exist on a menu. You run this program using Batch Versions, which you access by entering *BV* in the fast path.

- P99410 (EnterpriseOne System Control)

  You manually add the record to the F99410 using this interactive program.

Note. If you are using the Mobile Sales system, in addition to creating the SY90CA record, you must also update the CRMMSL record in the F99410 table so that the Use Module field contains *Yes*. You can use the P99410 program to manually update the Use Module field, or you can run the R90CA171 (F99410 Activate Mobile Sales) program to update the field.

See Activating Mobile Sales Functionality in the *JD Edwards EnterpriseOne Tools 8.98 System Administration Guide*

Form Used to Activate the CRM Foundation System

Form Name	FormID	Navigation	Usage
Work With EnterpriseOne System Control	W99410A	Enter P99410 in the fast path and then hit Enter.	Access forms to activate JD Edwards EnterpriseOne systems.
EnterpriseOne System Control - Revisions	W99410B	On Work With EnterpriseOne System Control, click Add.	Activate the CRM Foundation system.

Activating the CRM Foundation System

Access the EnterpriseOne System Control - Revisions form.

Data Item	Enter *SY90CA* in this field to activate the JD Edwards EnterpriseOne CRM Foundation system. You must also enter a description in the field directly below this field. For example, enter *CRM Foundation*.
Yes	Select this option to activate the JD Edwards EnterpriseOne CRM Foundation system.

Setting Up CRM Constants

This section provides an overview of CRM constants and discusses how to set up the CRM constants.

Understanding CRM Constants

Before you can process any CRM-related information, you must set up the CRM Constants program to define the sales, service, and support features that the organization uses, and how the system processes information. You set up CRM constants once, and these settings are used to process CRM information for each company within the organization.

The CRM Constants program controls:

• How the system saves information.

   You can set up the system to automatically save information, or to prompt you to save information, when you move from one form to another. When you set up the system to prompt you, you have the option of saving the data or canceling the save. If you set up the system to save automatically, all data changes that you make are saved when you exit a form.

• How the system determines which sales team members to assign to a sales opportunity.

   You can set up the system to assign sales team members to a sales opportunity based on the sold to customer, the ship to customer, or both.

   For example, a sales opportunity might have different sold to and ship to customers. Each of those customers has its own sales team. This constant determines whether the active members of the sold to, ship to, or both sales teams are copied to the sales opportunity sales team.

• Which phone number to display for sales team members.

When you enter sales team members into the system, you can enter multiple phone numbers for each member. To ensure consistency when viewing the sales team members that are associated with customers, opportunities, quotes, and sales orders, you can specify which type of phone number is displayed for the sales team members.

For example, if the sales members are typically traveling, and can most easily be reached on a mobile phone, you can set up the system to display the mobile phone number of each sales team member.

- How commissions are processed when a sales order is created.

You can determine whether records are written to the sales commission tables based on the sales order sold to address, ship to address, or both. This setting is used only to determine which sales team members receive commissions. You must set up commission information for sales team members and customers in Oracle's JD Edwards EnterpriseOne Sales Order Management system in order to calculate the actual commission amounts.

If you base commissions on the Sold To address, when a sales order is created, only the sales team members that are associated with the Sold To customer record are written to commission tables.

For example, Joe Smith is the sales representative for Customer A-1, which is designated as the Sold To customer on a sales order. Nancy Jones is the sales representative for Customer A-2, which is designated as the Ship To customer on the sales order. Because the CRM constants have been set up to base commissions on the Sold To record only, Joe Smith is the only sales team member whose commissions are written to the commissions tables.

- Whether the system updates the Sales Order Extension tables.

You use the Sales Order Extension option to determine whether the system updates the F4201UR table and the F4211UR table at the time of sales order entry or when an opportunity is being converted to a sales order/quote. These tables can be configured by the user to store data that is not stored in other JD Edwards EnterpriseOne tables.

- Which currency code and monetary amounts are associated with each gold bar level.

You can use gold bar functionality to visually display the potential monetary amount that is associated with a lead or opportunity. You define the monetary parameters that determine the number of gold bars that appear. There are four gold bars available for use. You set up the system so that the customers with the largest monetary potential display 4 bars, and those with the least amount of monetary potential display one, or no bars. The currency code that you enter in the constants is the currency that the system uses to determine the number of gold bars for each customer or opportunity.

- Which type of calendar is displayed when using the calendar feature.

The calendar feature enables you to create several different types of calendars. Using the CRM Constants, you can specify the default calendar type to display when accessing the calendar feature from CRM applications. The system adds all activities that are created by or associated with CRM programs to the type of calendar that you specify in the constants. Typically, you select a CRM calendar so that the system adds all CRM-related activities to the CRM Calendar.

Calendar type codes are stored in UDC 01/CY, and might include types such as personal calendars, carrier calendars, or resource calendars.

See Also

JD Edwards EnterpriseOne Sales Order Management 9.0 Implementation Guide, "Setting Up Order Processing Information," Setting Up Commission Information

JD Edwards EnterpriseOne Address Book 9.0 Implementation Guide, "Using Foundation Calendar"

Form Used to Set Up CRM Constants

Form Name	FormID	Navigation	Usage
CRM Constants	W90CA000C	Sales Setup (G90CA03), CRM Constants	Set up CRM Constants.

Setting Up CRM Constants

Access the CRM Constants form.

CRM Constants, Process

Select the Process tab.

Implicit Save   Enter an option that specifies whether the system prompts the user to save, or automatically saves data changes when exiting a form.

CRM Constants, Sales Team

Select the Sales Team tab.

Sold To Ship To Default   Specify whether the system assigns the sales team members to an opportunity based on the ship to customer, sold to customer, or both. For example, if you select Sold To, the system assigns the active sales team members from the opportunity's Sold To customer record to the sales opportunity. Values are:

Blank: Sold To

1: Ship To

2: Both

Phone Number Type   Enter the type of phone number that the system displays on all sales team forms in the JD Edwards EnterpriseOne CRM Sales Force Automation system. Values are stored in UDC 01/PH and might include:

Blank: Business telephone number

FAX: Fax telephone number

HOM: Home telephone number

CRM Constants, Sales Order

Select the Sales Order tab.

Sold To Ship To Default   Enter the method that the system uses to determine which members of a sales team are eligible to receive commissions for a sales order that is generated using the JD Edwards EnterpriseOne CRM Sales Force Automation system. This setting determines which sales team member records are written to the sales commissions tables when a sales order is created. Sales team members must be active on the sales team in order to be eligible for commissions. Values are:

0: Only sales members associated with the Sold To customer are eligible for commissions.

1: Only sales members associated with the Ship To customer are eligible for commissions.

2: Sales team members associated with both the Sold To and Ship To customers are eligible for commissions.

Update Sales Order Extension	Select this option if you want the system to update the F4201UR table and the F4211UR table during sales order entry, or when an opportunity is converted to a sales order or quote. These tables are used to store customized information about sales orders. It is necessary to update these tables only if you have set them up.

CRM Constants, Gold Bars

Select the Gold Bars tab.

Company Currency Code	Enter the value of the currency code you want to use to define the potential monetary amounts associated with opportunities. The system uses this currency code to calculate the monetary amount of each opportunity or customer for gold-bar display purposes.
No Bars	Enter the value at or below which no gold bars appear. For example, if you do not want gold bars to appear for any opportunities with a monetary value of 1,000 USD or less, enter *1000.* This amount is associated with the currency code that you enter in the Currency Code field.
One Bar	Enter the values, between which, one gold bar appears. For example, if you want one gold bar to appear for opportunities with a monetary value between 1,000.01 USD and 15,000 USD, enter *1000.01* in the left field, and enter *15000* in the right field on the One Bar row. This amount is associated with the currency code that you enter in the Currency Code field.
Two Bars	Enter the values, between which, two gold bars appear. For example, if you want two gold bars to appear for opportunities with a monetary value between 15,000.01 USD and 100,000 USD, enter *15000.01* in the left field, and enter *100000* in the right field on the Two Bar row. This amount is associated with the currency code that you enter in the Currency Code field.
Three Bars	Enter the values, between which, three gold bars appear. For example, if you want three gold bars to appear for opportunities with a monetary value between 100,000.01 USD and 500,000 USD, enter *100000.01* in the left field, and enter *500000* in the right field on the Three Bar row. This amount is associated with the currency code that you enter in the Currency Code field.
Four Bars	Enter the value, above which, four gold bars appear. For example, to display four gold bars for opportunities of 500,000.01 USD or more, enter *500000.01* in the field in the Four Bar row.

CRM Constants, Calendar

Select the Calendar tab.

Calendar Drop Down Menu	Select the calendar option from the menu to determine the default calendar type that is displayed when the calendar feature is accessed from a CRM Sales Force Automation application. The system adds all activities that are created or associated with CRM applications to the calendar type that you specify here.

Selecting a calendar type enables you to differentiate the calendar on which CRM-related activities reside, as compared to other activities. For example, Sarbanes Oxley activities might be on a Finance calendar. The system also uses the calendar type constant to determine which fields a user must complete when creating activities.

CHAPTER 4

Managing Employees for CRM

This chapter discusses how to manage CRM employees.

Managing CRM Employees

This section provides an overview of employee information for CRM, and discusses how to:

- Enter basic employee information.
- Enter additional phone and email information for employees.
- Set up service provider information.
- Assign partners to employees.
- Enter attachments for employees.
- Review parent child relationships.
- Set processing options for the Employee Detail program (P90CA040).
- Set processing options for the Employee Processing Options program (P90CA043).

Understanding Employee Information for CRM

Before you can add an employee to the sales force or to a provider group, you must enter the employees into the system. Each sales or support employee must have a record in the F0101 table and the F0111 table.

The method that you use to enter employees depends upon the JD Edwards EnterpriseOne systems that the organization uses. If the organization uses Oracle's JD Edwards EnterpriseOne Human Capital Management (HCM), the system creates address book records during the HCM employee entry process. If you do not use JD Edwards EnterpriseOne Human Capital Management, you can enter employees into the system using Oracle's JD Edwards EnterpriseOne Address Book system.

Alternatively, you can enter employees using the Employee Detail program (P90CA040). This program enables you to enter and maintain all CRM-related employee information from one entry point. When you add employees using this program, the system creates the necessary address book records. Regardless of which method you use to enter employees, you can use the Employee Detail program to maintain all CRM-related employee information.

After you enter employees into the system, they can participate on sales teams associated with customers, opportunities, quotes, and sales orders. They can be added to provider groups, which are responsible for managing service requests or cases. Provider groups are also used to determine case escalation paths.

The employees in the organization might work frequently with members of other organizations with which you have partnerships. Some of the employees might be responsible for maintaining those partner relationships. Using the Employee Detail program, you can associate employees with multiple partners so that you can review partner relationships by employee.

Employees can be commissioned or non-commissioned. You can access employee commission information from the Employee Detail program entry point.

After you set up basic information about the employee, you can then enter additional employee information, such as:

- Additional phone and email information.
- Service provider information.
- Partner relationships.
- Attachments.

Before you enter or maintain CRM-related employee information, you must set the processing options for the Employee Detail program (P90CA040) and the Employee Processing Options program (P90CA043). The Employee Processing Options program can be accessed using the Interactive Versions program (fast path IV). This program is not located on a menu.

Reviewing CRM Information for Employees

In addition to entering employee information, you can use the Employee Detail program to review CRM-related employee information. This table lists the type of information that you can review, along with the description and location of the information:

Type of Information	Description and Location
Provider Group	You can review all of the provider groups that an employee is associated with. Provider group information is located on the Service tab of the Employee - Manage <Employee Name> form.
Cases	You can review all of the cases that an employee is associated with. You can use this information to search for cases associated with an employee: • Customer number • Site number • Contact number • Equipment number • Case status Case information is located on the Service tab of the Employee - Manage <Employee Name> form.

Type of Information	Description and Location
Opportunities	You can review all of the active opportunities for which the employee is a member of the sales team. The opportunity information that you can review includes: • Customer • Sales cycle • Probability of closing • Potential amount Opportunity information is located on the Sales tab of the Employee - Manage <Employee Name> form.
Pipeline	You can review the potential revenue associated with an employee by viewing the employee's pipeline. Pipeline information is located on the Sales tab of the Employee - Manage <Employee Name> form.
Customers	You can review all of the customers with which an employee is associated. If the employee is a member of a customer's sales team, the system displays that customer. Customer information is located on the Customer and Partner tab of the Employee - Manage <Employee Name> form.
Parent Child Hierarchy	You can review the parent child relationships for employees within the organization. The system displays, in hierarchical detail, the organizational structure of the selected employees.

When you review CRM-related information for employees, some forms enable you to click the Expand Hierarchy or Collapse Hierarchy buttons to view information for the selected employee as well as the employee's subordinates.

For example, Jane Ryan has 12 employees who report to her. When you review customer information for Jane, you initially see only those customers whose sales teams include Jane. If you click the Expand Hierarchy button, the system displays all customers whose sales teams include Jane or one of her subordinates. If you click the Collapse Hierarchy button, the system removes information about the subordinates, and displays only Jane's information.

Related Links

The Employee Detail program provides you with links to programs in other JD Edwards EnterpriseOne product areas that contain employee information. You can use these links to access, review, and edit these types of information:

• Accounts payable information

• Accounts receivable information

• Regional information

• Bank account information

• Address book information

• Contact information

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• Commission information

Note. Documentation about entering and maintaining the preceding information resides in the product-specific implementation guides that are associated with each product area.

See Also

JD Edwards EnterpriseOne Customer Relationship Management 9.0 Sales Applications Implementation Guide, "Managing the Sales Force"

JD Edwards EnterpriseOne Customer Relationship Management Support Applications 9.0 Implementation Guide, "Setting Up Provider Groups"

JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 9.0 Implementation Guide, "Setting Up Employee Information"

JD Edwards EnterpriseOne Address Book 9.0 Implementation Guide, "Entering Address Book Records"

JD Edwards EnterpriseOne Sales Order Management 9.0 Implementation Guide, "Setting Up Order Processing Information," Setting Up Commission Information

JD Edwards EnterpriseOne Accounts Payable 9.0 Implementation Guide

JD Edwards EnterpriseOne Accounts Receivable 9.0 Implementation Guide

Forms Used to Enter Employees for CRM

Form Name	FormID	Navigation	Usage
Search For Employees	W90CA040F	• CRM Foundation Daily Processing (G90C01), Employee. • Periodic Sales Force Automation Processing (G90CA02), Employee.	Select existing employees for revision, or access the Add New Employee form.
Employee Parent Child Relationships	W90CA040D	Click the Parent Child Hierarchy link on the Search for Employees form.	Review parent child relationships.
Add Employee	W90CA048A	Click Add on the Search for Employees form.	Enter basic employee information.
Employee - Manage <Employee Name>	W90CA040A	Select an employee from the Search for Employees form.	Review and maintain employee information.
Employee Attachments for <Name>	W90CA047A	Select the Attachments tab on the Employee - Manage <Employee Name> form.	Enter attachments for an employee.

Entering Basic Employee Information

Access the Add Employee form.

Search Type	Verify that the system populates this field with an *E*. Values for this field are stored in UDC (01/ST), and are used to specify the kind of address book record the system creates.
Business Unit	Enter the business unit to which the employee belongs.
Department	Enter the name of the department in which the employee works.
Industry Classification	Enter the industry code associated with the employee.

This code is part of a numerical system that is used in to classifies goods and services. This code can be in the format of these systems of classification:

- Standard Industrial Classification or North American Industry Classification System.

  These systems are used by the United States, and codes associated with these systems are between four and six digits.

- Harmonized System.

  The international method of classifying goods. More than fifty countries use this code. It can be up to 10 digits.

- Standard Industrial Trade Classification.

  A numerical code system developed by the United Nations to classify goods used in international trade. International organizations use this code. It can be up to six digits.

Note. This code is not used in the sales force alignment process. You must add the employee to an industry grouping, not an industry classification, to automatically assign the employee to a sales team.

Employee Y/N	Select this option to specify that the record you are creating is for an employee. This field is informational only.
HCM Records Exist	Displays whether Human Capital Management (HCM) records exist for this employee. The system populates this field for employees who were entered using the JD Edwards EnterpriseOne HCM system.
Ignore Service Escalation	Select this option if you do not want the employee to be included in the escalation process for service requests. You can use this option to temporarily remove an employee from the escalation process while they are on vacation or away from the office for a significant period of time.
Preferred Contact Method	Enter the desired contact method for the employee. Examples include:

E: Email

F: Fax

C: Phone

W: Address

P: Pager

Entering Additional Phone and Email Information for Employees

Access the Employee - Manage <Employee Name> form. Select the Employee link and then click the Phone and E-mail tab.

Employee - Manage <Employee Name> form: Employee tab: Phones and E-mail link

Setting Up Service Provider Information

Access the Employee - Manage <Employee Name> form. Select the Employee tab and then click the Service Provider link.

Employee - Manage <Employee Name> form: Employee tab: Service Provider link

ACD Extension   Enter the ACD phone extension to which incoming service calls that are associated with this employee should be routed.

Mail Box Designator   Enter the type of employee mailbox that the system uses to deliver messages associated with service calls.

Service Group   Enter the name of the service group to which the employee belongs. Service groups enable you to separate employees into groups using information such as region, type of service provided, or billing arrangements.

Work Center   Enter the business unit, or work center, to which the employee belongs.

                           Business unit security might prevent you from viewing information about business units for which you have no authority.

Daylight Savings Rule Enter the daylight savings rule that is associated with the location in which the employee works. You use daylight savings rules to adjust time for a geographic or political locale.

Pricing Method   Enter a value that specifies the method that is used when charging customers for services provided by the employee. Values are:

                           F: One flat rate. Charges for parts are already included in the flat rate.

                           T: Actual labor hours. Charges for parts are based on actual parts used.

                           Blank: The service provider is an internal service provider and should not be paid.

                           Enter a blank value only when you are defining the method of pricing for a service provider.

Reimbursement Mode	Specify how the system reimburses the service provider for a claim or how a claim is paid by a supplier.
	For example, dealers can request payment for a claim through the standard accounts payable process, or they can request credits to their accounts receivable accounts.
Pay Service Provider for Parts	Enter a value that specifies whether the service provider should be paid for parts used during a repair. Values are:
	Y or *1:* Pay.
	N or *0:* Do not pay.

Assigning Partners to Employees

Access the Employee - Manage <Employee Name> form, Customer and Partner tab. Click the Partner link.

To assign partners to employees:

1. Click the Assign Partners button.

2. On Link Partners, search for and select the partners that you want to attach to the employee, and then click Select.

    The selected partners appear in the detail area of the form.

3. To remove a partner, click the Remove button.

Reviewing Parent Child Relationships

Access the Employee Parent Child Relationships form.

You use the Extended Search link to locate a single employee and navigate directly to that employee in the hierarchy view. When you have selected a single employee, you can click the Up One Level button to show the employee's immediate supervisor in the tree and the All records button to show all top level employees in the tree.

Setting Processing Options for the Employee Detail Program (P90CA040)

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

Display

These processing options specify how information is displayed on the employee entry forms.

1. Tax ID (For Future Use)	Specify whether the employee's tax ID is displayed on the employee forms. Values are:
	Blank: Display. (Default)
	1: Hide.
	2: Disable.

Versions

These processing options specify which versions of associated programs the system uses when processing CRM employee information.

1. Address Book (P01012) Version, **2. Customer Master (P03013) Version**, **3. Supplier Master (P04012) Version**, **4. Contact Information (P90CA070) Version**, **5. Employee Detail Processing (P90CA043) Version**, and **6. Opportunities (P90CB020) Version**	Enter the version of the program that you want the system to use when processing CRM employee information. If you leave this option blank, the system uses ZJDE0001.

Setting Processing Options for the Employee Processing Options Program (P90CA043)

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

Defaults

These processing options are used to specify default information about employees in the organization.

1. Search Type	Specify the default search type that appears when you enter an employee into the system. The default value is *E*.
2. Organizational Structure Type	Specify the default organizational structure that appears when you enter an employee into the system.
3. Employee Phone Number Type	Specify which type of phone number to display for the employee. The system retrieves the first phone number of this type from the F0115 table.
4. Relation Type	Specify the default value for the Relation Type field when you enter an employee. Typically, you enter the employee's assistant as the related person. This value is used to update the F01112 table for the assistant.
5. Assistant Phone Number Type	Specify the default value that appears in the Assistant Phone Number Type field when you enter an employee. This value is used to update the Assistant Phone Number Type in the Contact Phone Number table (F0115).

Versions

These processing options are used to specify program versions when entering employees.

1. Address Book MBF (P0100041) Version	Specify the version of the Address Book MBF (P010004) to use when entering employees. If you leave this processing option blank, the system uses version ZJDE0001.
2. Who's Who MBF (P0100087) Version	Specify the version of the Who's Who MBF (P0100087) to use when entering employees. If you leave this processing option blank, the system uses version ZJDE0001.

CHAPTER 5

Managing Items and Item Catalogs for CRM

This chapter provides an overview of items and item catalogs, lists prerequisites, and discusses how to:

• Manage items

• Manage item catalogs

Understanding Items and Item Catalogs

If the organization sells, supports, or services items, you must enter those items into the JD Edwards EnterpriseOne system so that you can track and store details about those items. You enter items into the system using the Item Master program (P4101), which is part of the JD Edwards EnterpriseOne Inventory Management system. After you enter the item into the system, you can use the CRM Item Detail program (P90CA100) to review CRM-related details about the item, such as:

• The sales opportunities that include the selected item.

• Item availability and pricing information.

• Item features.

• Scripts and solutions that are associated with the item.

You can also use the CRM Item Detail program to associate an item with a partner. You might do this if the organization sells, supports, or services items that are made or supplied by a partner organization.

After you enter items, you can create item hierarchies, which are also called catalogs. You use the Item Hierarchy (Web) program (P4101H), which is part of Oracle's JD Edwards EnterpriseOne Inventory Management system, to set up item hierarchies. After you create item hierarchies, you can:

• Categorize items.

• Attach catalogs to leads, opportunities, customers, and partners.

• Enable customers to use catalogs when placing orders using self-service applications.

Prerequisites

Before you complete the tasks in this chapter, you must enter items into the system.

JD Edwards EnterpriseOne Inventory Management 9.0 Implementation Guide, "Entering Item Information"

JD Edwards EnterpriseOne Sales Order Management 9.0 Implementation Guide, "Setting Up Order Processing Information," Setting Up Self-Service Information for Sales Order Management

JD Edwards EnterpriseOne Customer Self Service 9.0 Implementation Guide, "Placing Orders," Ordering Through the Product Catalog

Managing Items

This section provides an overview of item management for CRM, and discusses how to:

- Associate an item with a partner.

- Access a sales opportunity from an item.

Understanding Item Management for CRM

After you enter items into the JD Edwards EnterpriseOne system, you can use the CRM Item Detail program (P90CA100) to view item information, and enter and access additional CRM item information.

You can search for items using a query. Using queries limits the search and is useful if you frequently conduct the same type of search. For example, if you routinely search for items that have a particular stocking type, you can create a query that restricts the search to that stocking type. You can then use this query each time that you want to perform that search.

After you search for and select an item, you can view these types of item information:

- An image of the item (if one was added during item entry).

- Item pricing information.

- Item availability from branch/plants.

- A description of item features.

- Partners who are associated with the item.

- Opportunities that are associated with the item.

- Attachments for the item.

- Scripts or solutions that are created for the item.

Much of the information that you see when you access items using the P90CA100 is read-only. To change the values in any of the disabled fields, you must access the item using the Item Master program (P4101).

You can also associate a partner with an item. You might do this if the organization sells, services, or supports an item that is made by one of the partners.

You can also access and change a sales opportunity that is associated with an item. When you access the Sales tab on the Item - Manage <Item Name> form, you can view all of the active opportunities that include the item. You can then select the opportunity and make any necessary changes.

Lastly, you can add attachments to an item. When you add a text attachment to an item, the text that you enter appears on the item's Detail tab as a long description.

Forms Used to Manage Items

Form Name	FormID	Navigation	Usage
Search For Items	W90CA100D	• CRM Foundation Daily Processing (G90C01), Item Inquiry • Periodic Sales Force Automation Processing (G90CA02), Item Inquiry	Search for and select items.
Item - Manage <Item Name>	W90CA100B	On the Search For Items form, select an item.	View item information, associate an item with a partner, or access a sales opportunity.

Associating an Item with a Partner

Access the Item - Manage <Item Name> form. Select the Partner tab.

Item - Manage <Item Name> form: Partner tab

1. Review the data in the grid to determine which partners are already assigned to the item.

2. To assign a new partner to the item, click Assign Partner.

3. On the Link Partners form, click Find to view a list of partners.

    If you know a partner's number, name, state, or city, you can enter that information in the grid and search for a specific partner.

4. Select the partner that you want to assign to the item, and then click Select.

To remove a partner's association with an item, you can do so on the Item Inquiry - Item Manage <Item Name> form. Select the Partner and then click Remove.

Accessing a Sales Opportunity from an Item

Access the Item - Manage <Item Name> form. Select the Sales tab.

1. Select the opportunity that you want to access.

2. On the Opportunity - Manage <Opportunity Name> form, review and update information as necessary.

3. Save any changes, and then click Close to return to the item.

Managing Item Catalogs

This section provides an overview of item catalogs and discusses how to:

• Create a new catalog.

• Perform an advanced item search.

• Perform an advanced catalog search.

• Set processing options for the Item Catalog program (P90CA106).

Understanding Item Catalogs

You create item catalogs, also known as item hierarchies, using the Item Hierarchy (Web) program. You can then access and manage those catalogs using the Item Catalog program (P90CA106). The Item Catalog program enables you to view catalog information and add catalog items to a sales order, quote, opportunity, or lead.

The Item Catalog program provides these features for all CRM, sales, support, and service users:

• Locate catalog items quickly.

• View catalog item information such as the item description, stocking type, unit of measure, product model, and product family.

• View a catalog item's list of features, availability, and base price.

• View the opportunities and partners that are associated with a catalog item.

• View catalogs in single select or multiple select mode.

• Associate an entire catalog to a lead, opportunity, quote, or sales order.

Accessing Item Catalogs

You can view catalogs by selecting Item Catalog from the menu. And, because the Item Catalog program is integrated with other JD Edwards EnterpriseOne applications, you can access item catalogs from the Sales Order, Quote Order, Opportunity, and Lead applications.

Functionality might vary slightly depending on where you access the catalog. For example, when you access the Item Catalog program from a sales lead, you can select only catalogs. You cannot select an item until after the lead becomes an opportunity. After the lead has been converted to an opportunity, you can select either an item number or a catalog. After the opportunity becomes a quote or a sales order, you can select an item only from the catalog.

Selection Modes

In *single select* mode, you can select a single item or catalog. When you are in single select mode, the left portion of the screen shows the selected catalog, and the right portion of the screen shows a list of selectable items and catalogs. You can select either a single catalog or a single catalog item when you are in single select mode.

In *multiple select* mode, you can quickly select multiple items or catalogs. In multiple select mode, you can browse through and select items from different catalogs. When using multiple select mode for items, you must specify the desired quantity for each item on the right side of the form. To use a different catalog, select the catalog from the left side of the form and enter item quantities for that catalog's items on the right side of the form.

In either mode, after you make the selections and exit from the catalog form, the system returns the choices to the application from which you accessed the Catalog function. For example, when you access Catalog from the Sales Order application, the system adds the items that you selected on the catalog form to the active sales order.

This table summarizes the various catalog access points, the selection modes, and selection choices:

Entry Point	Selection Mode	Selection Choices
On the Lead - Manage <Lead Name> form, select the Lead tab, click the Product Interest link and then click the visual assist next to the Description field.	Single select mode	Select catalogs only.
On the Lead - Manage <Lead Name> form, select theLead tab, click the Product Interest link and then click the Assign Product Interest button.	Multiple select mode	Select catalogs only.
On the Opportunity - Manage <Opportunity Name> form, select the Detail tab and then click the visual assist next to the Product Catalog or Item Number fields.	Single select mode	Select items or catalogs.
On the Sales Order - Edit Sales Order form, select the Sales Order Header tab, and then select Product Catalog from the Go To: drop-down menu.	Multiple select mode	Select items only.

Entry Point	Selection Mode	Selection Choices
On the Sales Order - Edit Sales Order form, select the Sales Order Detail tab, and then select Product Catalog from the More Row Actions: drop-down menu.	Single select mode	Select items only.
On the Quote Order - Edit Sales Order form, select the Sales Order Header tab, and then select Product Catalog from the Go To: drop-down menu.	Multiple select mode	Select items only.
On the Quote Order - Edit Sales Order form, select the Sales Order Detail tab, and then select Product Catalog from the More Row Actions: drop-down menu.	Single select mode	Select items only.

Navigating the Catalog Hierarchy

Catalogs are displayed on the left side of the form in a tree format. This means there are sub-catalogs, sub-sub-catalogs, and so on. You can click the plus or minus sign to expand or collapse the hierarchy. When you are several levels down, you can click Up One Level or Top Level to go immediately up one level or to the highest level, respectively.

Regardless of which level you are on, the right side of the form always shows items for the currently selected catalog. As you move through the various levels of catalogs, the right side of the form changes to reflect the items that are available from the catalog that you selected on the left side of the form.

Advanced Catalog Searches

The Advanced Catalog Search link enables you to perform an advanced search for catalogs. This feature enables you to quickly find and select catalogs without scrolling through a list of catalogs.

When you select the Advanced Catalog Search link, you can see the available catalogs, as well as a catalog path for each catalog name, which provides context.

Advanced Item Searches

The Advanced Item Search link enables you to perform an advanced search for specific items. This feature enables you to quickly locate and select catalog items without having to scroll through catalog pages.

When you select the Advanced Item Search link, you can search for items in all catalogs rather than first selecting a catalog and then trying to locate the item. On the Item Search and Select form, you can enter item information in the grid to restrict the search.

Forms Used to Manage Item Catalogs

Form Name	FormID	Navigation	Usage
Product Hierarchy Maintenance	W4101HD	Sales Order Management Setup (G4241), Item Hierarchy Manager	View catalog hierarchy, delete catalogs, or access forms to create new catalogs.
Product Hierarchy Revisions	W4101HE	Click Add on the Product Hierarchy Maintenance form.	Create a new catalog.
Select From Catalog	W90CA106B	• CRM Foundation Daily Processing (G90C01), Item Catalog • Periodic Sales Force Automation Processing (G90CA02), Item Catalog	Select and view item catalogs.
Item Search & Select	W40ITM1A	Click the Advanced Items Search link on the Select From Catalog form.	Perform an advanced item search.
Catalog Search & Select	W90CA106C	Click the Advanced Catalogs Search link on the Search From Catalog form.	Perform an advanced catalog search.

Creating a New Catalog

Access the Product Hierarchy Revisions form.

Product Hierarchy Revisions form

Structure Type   Enter the type of organizational structure that applies to the catalog. For example, if the catalog is used by Customer Self Service applications, enter CSS in this field.

Description   Enter a brief description for the catalog. You can use this description to search for the catalog.

Sequence Number   Enter the catalog's sequence number, which determines the order in which the system displays valid catalogs.

Category Code   Enter a category code for the catalog. This field, along with the associated values, are user-defined.

User Defined Code   Enter a user defined code that applies to the catalog.

Parent Directory   Enter the parent catalog name if the catalog is subordinate to or nested within a main catalog. For example, *Bicycles* might be the parent catalog for the *Mountain Bikes* and *Road Bikes* catalogs.

See *JD Edwards EnterpriseOne Sales Order Management 9.0 Implementation Guide*, "Setting Up Order Processing Information," Setting Up Self-Service Information for Sales Order Management.

Performing an Advanced Item Search

Access the Item Search & Select Form.
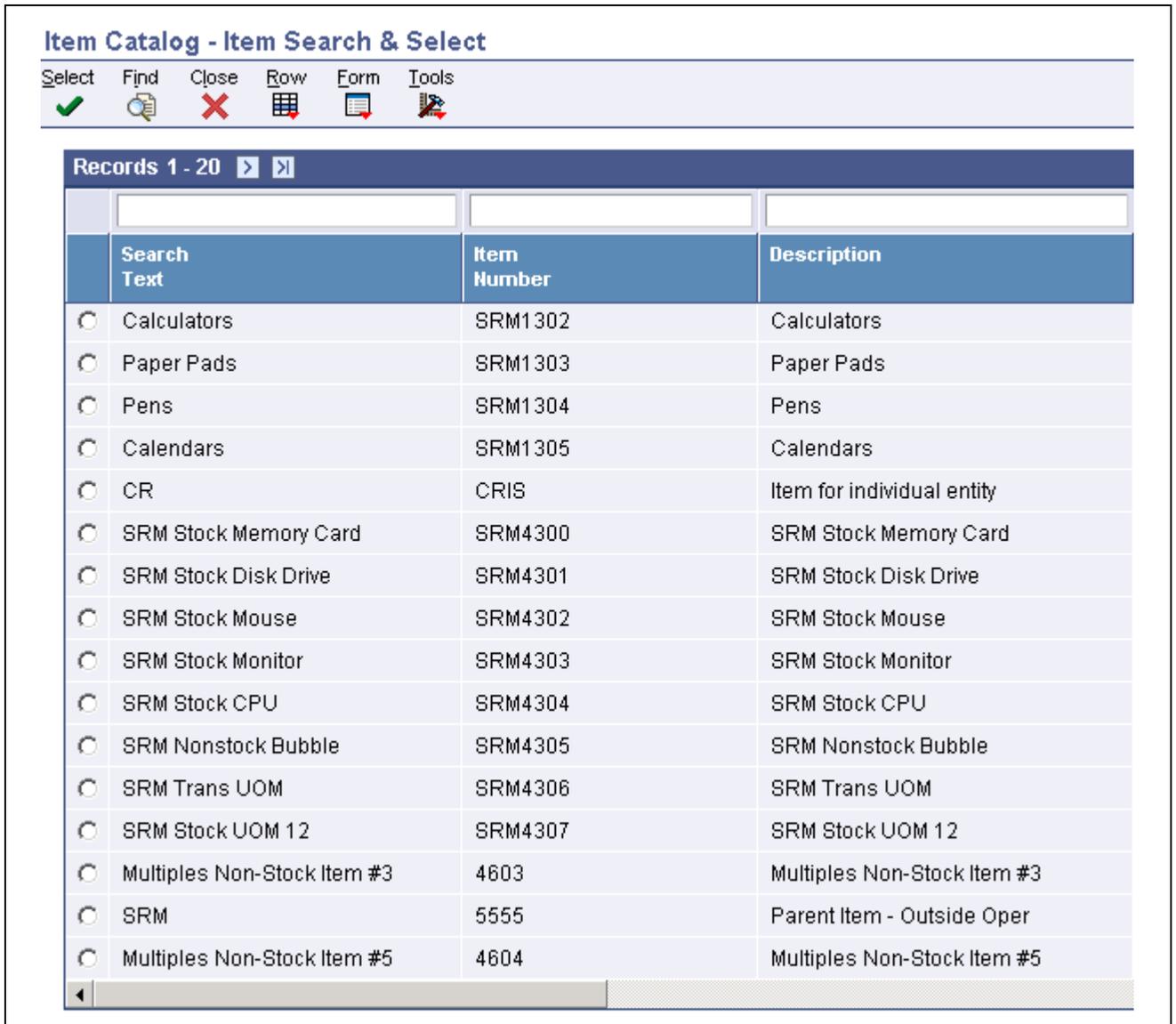
Item Search & Select form

| **Search Text** | Enter the name of the item that you want to locate. You can enter the whole name or part of a name. |
| **Item Number** | Enter the number that is associated with the item. |

Performing an Advanced Catalog Search

Access the Catalog Search & Select form.

Catalog Search & Select form

Catalog Path   Displays the navigation to the catalog's location. The path begins with the
                                    organizational structure type and is followed by any parent catalogs that are
                                    associated with the selected catalog.

Setting Processing Options for the Item Catalog Program (P90CA106)

Although processing options are set up during JD Edwards EnterpriseOne implementation, you can change
processing options each time you run a program.

Default

Organization Structure   Specify a default value for the Organizational Structure field on the Item
Type   Catalog Search and Select form.

CHAPTER 6

Managing Customer Information

This chapter provides an overview of customer information and discusses how to:

* Enter basic customer information.

* Enter additional customer information.

* Review sales information for customers.

* Review service information for customers.

Understanding Customer Information

The CRM Customer Detail program (P90CA080) enables you to enter, view and modify CRM information for each customer. You can also access additional JD Edwards EnterpriseOne programs directly from the CRM Customer Detail program, which enables you to easily view and update additional information about a customer. For example, if you select the Sales tab from the customer record, you can add a new sales order for the customer or update an existing order using programs from the JD Edwards EnterpriseOne Sales Order Management system.

You can also create parent/child relationships between customers. For example, one large company might have several subsidiaries. You can enter the large company as the parent customer and the subsidiaries as children of the large company. If a selected customer record has subordinate records, you can click the Parent Child Hierarchy link to view the parent and child records.

When you enter a customer record, the system updates these tables:

* Address Book Master (F0101)

* Customer Master by Line of Business (F03012)

* Customer Master Commission Information (F42140)

The CRM Customer Detail program includes these tabs:

Tab Name	Purpose
Customer	View or modify customer detail information such as addresses, phone numbers, financial information, and service information.
Contact and Partner	View or modify information for contacts or partners that are associated with the customer.
Activities	View or modify activities that are related to the customer, or add a new activity.

Tab Name	Purpose
Sales	View or modify sales order information for the customer, or add a new order.
Service	View or modify service contract information, cases, service work orders, or equipment master records for the customer. You can also add new records.
Attachments	View, modify, or create attachments for the customer.

Entering Basic Customer Information

This section provides overviews of basic customer information and discusses how to:

• Enter basic customer information.

• Set processing options for the CRM Customer Detail program (P90CA080).

Understanding Basic Customer Information

You use the Customer - Add Customer form to enter basic customer information. This form contains tabs that enable you to enter and modify customer information as described in this table:

Link Name	Link Purpose
Address and Phone	Enter the primary addresses, telephone and electronic addresses.
Financial	Enter credit, tax, payment terms, language, and price group information for the customer.
Classification	Enter user-defined information about customers. This tab includes 30 user-defined category code fields that you can customize to store information that is specific to the business needs.

After you enter basic customer information, you can use the CRM Customer Detail program to maintain and modify CRM customer information.

Note. After you enter basic customer information, you must activate the customer record before you can process the customer through many CRM functions. For example, you cannot enter a sales order for a customer until the customer record has been activated. To activate a customer record, select *Active* from the Customer Status field on the Manage <Customer Name> field.

See Chapter 6, "Managing Customer Information," Entering Additional Customer Information, page 47.

Forms Used to Enter Basic Customer Information

Form Name	FormID	Navigation	Usage
Customer - Search for Customers	W90CA080D	• CRM Foundation Daily Processing (G90C01), Customer. • Daily Sales Force Automation Processing (G90CA01), Customer. • Daily Support Processing (G90CE01), Customer.	Select customer records, access forms to add a new customer, or access a list of customers to which you can subscribe.
Customer - Add Customer	W90CA082C	Click Add on Customer - Search For Customers.	Enter basic customer information and subscribe to a customer during customer entry.
Customer - Manage <Customer Name>	W90CA080A	On Customer - Search For Customers, select a customer record.	View or modify customer information. Subscribe to an existing customer.

Entering Basic Customer Information

Access the Customer - Add Customer form.

Search Type   Enter the user-defined code (system 01, type ST) that indicates the kind of address book record to search for. For example:

E: Employees

X: Ex-employees

V: Suppliers

C: Customers

P: Prospects

M: Mail distribution lists

TAX: Tax authorities

Industry Classification   Enter the code that classifies goods and services. This code can follow the format of any of these classification systems:

Standard Industrial Classification (SIC) or North American Industry Classification System (NAICS). A numerical system that the United States uses to classify goods and services. This code is four digits for SIC or six digits for NAICS.

Harmonized System (HS). The international method of classifying goods. More than fifty countries use this code. An HS code can be up to 10 digits.

Standard Industrial Trade Classification (SITC). A numerical code system that was developed by the United Nations to classify goods that are used in international trade. International organizations use this code. An SITC code can be up to six digits.

PIM Subscription (personal information management subscription)

Select this option to add the customer record to the personal information management (PIM) system address book. PIM systems include Microsoft Outlook (Exchange server) and Lotus Notes (Domino server). This option appears only if the logged-in user is set up as a PIM user. When you select this option, the system automatically adds the customer to the PIM system contacts.

Address and Phones

Select the Address and Phones tab.

The system uses the information that you enter on this tab when you create a customer PIM subscription record.

Prefix

Enter the three-digit prefix, or area code, of the associated phone number.

Phone Number

Enter the six-digit phone number, not including the area code or prefix.

Financial

Select the Financial tab.

Parent Number

Enter the address book number of the parent company. The system uses this number to associate a particular address with a parent company or location. Any value that you enter in this field updates the F0150 table for the blank structure type. This address number must exist in the F0101 table for validation purposes.

Credit Limit

Enter the total amount that you allow the customer to spend on purchases before the system sends a workflow message. This value is used throughout the credit management programs. The system maintains the credit limit at the customer (child) level, not the parent level. The system sends workflow messages for each customer who is over their credit limit. When you set up or change the credit limit, the system sends a workflow message to the credit manager that the change is pending approval. The change to the credit limit is not reflected in the customer record until it is approved by the credit manager.

Credit Manager

Enter the name of the credit manager who is responsible for approving changes to the credit limit. You must set up the credit manager in the address book and then create an entry in the user-defined code table (system 01, type CR). When you set up the user-defined code value, you must also enter the credit manager's address book number in the Description 02 field.

Currency Code

Enter the code for the currency that applies to the customer.

Payment Terms

Enter the code that indicates the default payment terms for the customer. Payment terms determine the due date, discount amount, and discount due date that the system assigns when you create an invoice. Use a blank code for the payment terms that you use most frequently. Examples of payment terms include:

Blank: Net 15

1: 1/10 net 30

2: 2/10 net 30

D: Due upon receipt

N: Net 30

	P: Prox 25th
Language	Enter the user-defined code (system 01, type LP) that specifies the language to use on forms and printed reports. Before you specify a language, a code for that language must exist at either the system level or in the user preferences.
Tax Area	Enter the code that identifies a tax or geographic area that has common tax rates and tax authorities. The system validates the code that you enter against the F4008 table. The system uses the tax rate area in conjunction with the tax explanation code and tax rules to calculate tax and GL distribution amounts when you create an invoice or voucher.
Tax Expl Code (tax explanation code)	Enter the hard-coded user-defined code (system 00, type EX) that controls the algorithm that the system uses to calculate tax and general ledger distribution amounts. The system uses the tax explanation code in conjunction with the tax rate area and tax rules to determine how the tax is calculated. You can define each transaction pay item with a different tax explanation code.
Tax Exempt Certificate	Enter the number that tax authorities issue to tax-exempt individuals and companies to identify their tax-exempt status.
Price Group	Enter the user-defined code (system 40, type PC) that identifies a customer group. You can group customers with similar characteristics, such as comparable pricing.

Classification

Select the Classification tab.

Category Code 01 - 30	Enter one of thirty reporting codes that you can assign to an address in the JD Edwards EnterpriseOne Address Book system. Use these codes to identify addresses for reports, mailings, and so on. Examples include:
	01: Location or branch
	02: Salesperson
	03: New tenant
	04: Credit officer

Setting Processing Options for the CRM Customer Detail Program (P90CA080)

Although processing options are set up during JD Edwards EnterpriseOne implementation, you can change processing options each time you run a program.

Entry

Tax ID	Specify whether to display the Tax ID field when you add a customer record. You can also specify whether to disallow entry at this field.

Versions

1. Address Book (P01012) Version	Specify the version to use when you call the Address Book Master program (P01012) from the Related Links. If you leave this processing option blank, the system uses version *ZJDE0001*.

2. CRM Customer Processing (P90CA087) Version

Specify the version of the CRM Customer Master Business Function (P90CA087) to use. If you leave this processing option blank, the system uses version *ZJDE0001*.

3. Opportunity (P90CB020) Version

Specify the version of Opportunity (P90CB020) to use. If you leave this processing option blank, the system uses version *ZJDE0001*.

4. Quote Order Entry (P42101) Version

Specify the version of Quote Order Entry (P42101) to use. If you leave this processing option blank, the system uses version *ZJDE0001*.

5. Sales Order Entry (P42101) Version

Specify the version of Sales Order Entry (P42101) to use. If you leave this processing option blank, the system uses version *ZJDE0001*.

6. Contact (P90CA070) Version

Specify the version of Contact (P90CA070) to use. If you leave this processing option blank, the system uses version *ZJDE0001*.

7. Service Contract (P1721) Version

Specify the version of Service Contract (P1721) to use. If you leave this processing option blank, the system uses version *ZJDE0001*.

8. Activities Extension (P90CAEXT) Version

Use this option to specify the version of the P90CAEXT program to use. If you leave this option blank, the system uses version XJDE0001.

Process

1. Postal Code Editing

Specify whether to activate postal code editing. Postal code editing first verifies that the postal code exists in the F0117 table and then uses information from the table to enter blank City, County, Country, and State fields.

2. Postal Code Address Retrieval

Specify whether to activate Postal Code address retrieval. If the postal code is valid and address lines one through four are blank, the system can retrieve address information from the F0118 table. If you set the processing option to activate with the Postal Code Selection Window for multiple addresses, the system displays all available addresses for the postal code.

3. Phone Number Type

Specify the phone type (such as business, home, mobile, and so on) that the system uses on the Add Customer form. Values are specified in the 01|PH UDC table.

4. Organization Structure Type

Specify the organization structure the system uses for the Customer application's Parent Child Hierarchy view

5. Sales Team Member Search Type

Specify the default search type in the Employee Search and Select application when adding sales team members for the customer.

Mobile Client

1. Customer Action Security (Add and Change)

Specify whether a user has the authority to add customers while running on a mobile client.

2. Primary Address Action Security (Add and Change)

Specify whether a user has the authority to add and change primary addresses while running on a mobile client.

3. Alternate Address Action Security (Add, Change, and Delete)

Specify whether a user has the authority to add, change, and delete alternate addresses while running on a mobile client.

4. Phone and Fax Action Security (Add, Change, and Delete)	Specify whether a user has the authority to add, change, and delete phone and fax numbers while running on a mobile client.
5. Electronic Address Action Security (Add, Change, and Delete)	Specify to designate whether a user has the authority to add, change, and delete electronic addresses while running on a mobile client.
6. Mobile Duplicate Data Entry	Specify to allow or prevent data entry on the mobile client if you use Address Book's duplicate data entry feature. If you set this processing option to *1*, the system disables the customer Name, City, and State fields on the mobile client when maintaining an existing customer.
7. Mobile Duplicate Tax ID Validation	Specify whether to enable or prevent data entry on the mobile client if you use Address Book's duplicate tax ID entry feature. If you set this processing option to *1*, the system disables the customer Tax ID and Country fields on the mobile client when maintaining an existing customer.

Entering Additional Customer Information

This section provides an overview of additional customer information, and discusses how to:

• Activate a customer record for sales order processing.

• Enter additional address and phone information.

• Enter customer financial information.

• Enter customer options.

• Enter service information for a customer.

• Use related links.

• Enter customer contacts.

• Attach partners to a customer.

• Add activities to a customer.

• Create customer profiles.

• Work with customer interactions.

Understanding Additional Customer Information

After you enter basic customer information into the system, the system creates a customer record. Using this record, you can activate the customer and enter additional information about the customer. You activate a customer to ensure that you can process sales orders for that customer. You can set up the JD Edwards EnterpriseOne Sales Order Management system to hold sales orders that are associated with inactive customers.

Additional information about each customer includes:

• Addresses and phones

You can enter multiple addresses, phone and fax numbers, and email addresses for each customer record that you create.

- Financial information

    You can enter financial information about each customer, including credit, tax, general ledger, collections, and invoicing information. This information enables you to easily manage all of the financial transactions that occur between the organization and the customers.

- Customer options

    You can enter ordering, shipping, and pricing options that are specific to each customer. These options enable you to manage transactions when a customer purchases goods or services from the organization.

- Contacts

    You can enter multiple contacts for each customer. You can specify information about each contact, so that you know who to contact for each type of transaction that occurs between the organization and the customer.

- Associated partners

    You can associate partners with customers. For example, if one of the organization's partners is currently responsible for completing a sale to the customer, you can associate that partner with the customer.

- Activities

    You can attach existing activities or enter new activities to the customer record. Activities are the tasks that the people who are working with the customer should complete. For example, a sales representative might set up a recurring activity to contact an existing customer on a monthly basis to determine whether the customer needs additional goods or services.

- Customer profiles

    Because each organization's business needs differ, it is impossible to anticipate every piece of data that you must track for customers. To enable you to effectively manage customers, the JD Edwards EnterpriseOne CRM Foundation system provides you with configurable, user-defined customer profiling. You can access up to 30 user-defined fields using the Profiles link on the Customer - Manage <Customer Name> form. You can configure these fields to track information that is specific to the business and is not otherwise captured in the JD Edwards EnterpriseOne system.

- Interactions

    You can set up Apropos, a third-party system that enables you to manage the interactions between the organization and the customers.

- Subscriptions

    Using the PIM Subscription option, users can automatically add a customer record to their personal contacts in Lotus Notes or Microsoft Outlook. When you subscribe to a customer, corresponding objects are created in the PIM system database. If users update or delete items in either the CRM or PIM system, the changes are synchronized in both locations. For example, if you change the phone number or address for a customer in the PIM system, the system reflects that change in the JD Edwards EnterpriseOne customer record. The system makes inbound customer changes to the F0116 table.

    See *JD Edwards EnterpriseOne Address Book 9.0 Implementation Guide*, "Synchronizing Address Book Records with Personal Information Management Systems".

Forms Used to Enter Additional Customer Information

Form Name	FormID	Navigation	Usage
Search for Customers	W90CA080D	CRM Foundation Daily Processing (G90C01), Customer	Select a customer record.
Customer-Manage <Customer Name>	W90CA080A	Select a customer on the Search for Customers form.	Activate a customer, enter and update customer information, or subscribe to a single customer.
Add Activity	W01301B	On the Customer-Manage <Customer Name> form, select the Activities tab and click Add.	Add a new activity for the customer.
PIM Subscription	W90CA070E	Click the PIM Subscription link on Customer - Search for Customer.	Subscribe to multiple customers. See *JD Edwards EnterpriseOne Address Book 9.0 Implementation Guide*, "Synchronizing Address Book Records with Personal Information Management Systems".

Activating a Customer Record for Sales Order Processing

Access the Customer - Manage <Customer Name> form.

Customer Status   Select the *Active* option to activate the customer record. If you do not activate the customer record, it is possible that the system will place sales orders associated with this customer on hold. You set processing options for the Sales Order Entry program (P4210) to determine whether the system holds sales orders that are associated with inactive customers.

See *JD Edwards EnterpriseOne Sales Order Management 9.0 Implementation Guide*, "Entering Sales Orders," Setting Processing Options for Sales Order Entry (P4210).

Entering Additional Address and Phone Information

Access the Customer - Manage <Customer Name> form, and then click the Address and Phone link.

1. View or modify the customer's primary address information in the upper part of the form.

2. In the Alternate Addresses grid, perform any of these actions:

   • View alternate addresses for the customer.

   • Delete an alternate address by selecting the address in the grid and then click Delete.

- Change the customer's primary address to one of the alternate addresses displayed by selecting the address in the grid and then click Set Main Address.

  If you set an alternate address as the primary address and then want to undo the change, click Clear Main Address.

- Add a new alternate address by selecting a blank row in the grid and entering address information.

3. In the Phones and Fax grid, perform any of these actions:

- View phone and fax information for the customer.

- Delete a phone or fax number by selecting the entry in the grid and then click Delete.

- Add a new phone or fax number by selecting a blank row in the grid and entering phone or fax information.

4. In the Electronic Addresses grid, perform any of these actions:

- View electronic addresses for the customer.

- Delete an electronic address by selecting the address in the grid and then click Delete.

- Add a new electronic address by selecting a blank row in the grid and entering address information.

- Send a previously created email message by clicking Send Email.

  This field becomes active when the selected row contains an electronic address for which an email message was created.

5. When you are finished viewing or modifying address and phone information, save or undo any changes.

Entering Customer Financial Information

Access the Customer - Manage <Customer Name> form. Select the Customer tab and then click the Financial link.

Customer - Manage <Customer Name> form: Customer tab: Financial link

Payment Terms	Enter the code that indicates the default payment terms for the customer. Payment terms determine the due date, discount amount, and discount due date that the system assigns when you create an invoice. Use a blank code for the payment terms that you use most frequently. Examples of payment terms include:

Blank: Net 15

1: 1/10 net 30

2: 2/10 net 30

D: Due upon receipt

N: Net 30

P: Prox 25th

Currency Code	Enter the code that identifies the currency for a transaction.

Credit

Select the Credit tab.

Credit Limit	Enter the total amount that you allow the customer to spend on purchases before the system sends a workflow message. This value is used throughout the credit management programs. The system maintains the credit limit at the customer (child) level, not the parent level. The system sends workflow messages for each customer who is over their credit limit. When you set up or

change the credit limit, the system sends a workflow message to the credit manager that the change is pending approval. The change to the credit limit is not reflected in the customer record until it is approved by the credit manager.

Recall For Review Date   Enter the review date for the customer's credit information.

Credit Manager   Enter the name of the credit manager who is responsible for approving changes to the credit limit. You must set up the credit manager in the address book and then create an entry in the user-defined code table (system 01, type CR). When you set up the user-defined code value, you must also enter the credit manager's address book number in the Description 02 field.

Date of Last Credit Review   Enter the date on which the credit manager last examined this customer's payment record and assigned a credit status to the account.

Date Account Opened   Enter the date on which the customer record was created.

Temporary Credit Message   Enter the user-defined code that identifies a temporary credit status. Generally, you assign the code when an account becomes past due. The system automatically updates the temporary credit message based on the notification instructions that you set up for the policy that you assign to the customer. The system can automatically reset the temporary credit message back to the credit message if you activate the option in the policy. You can also manually enter and update the temporary credit message on the customer record. If this field is blank, the system assigns the value of the Credit Message field when you run Credit Analysis Refresh (R03B525). The system displays the temporary credit message on the transaction entry forms in the Accounts Receivable and Sales Order Management systems.

Credit Check Level   Enter the code that controls the way the system conducts credit checking. Codes are:

P: Credit check based on the customer's parent number.

C: Credit check against the customer number only.

S: Credit check against the customer sold to.

L: Credit check based on the line of business.

If you use method P, the system compares the open accounts receivable and open sales orders for the sum of the children and the parent against the credit limit for the parent number. Use this when a customer with multiple offices or branches—each of which order from you—asks that all credit checking be reflected in a single account. Even though credit checking can be conducted at the parent or customer number level, the system posts all accounts receivable to the customer number (SDAN8) during Sales Update (P42800).

Person Opening Account   Displays the system-provided user ID of the person who created the customer record.

Last Reviewed By   Displays the system-provided user ID of the person who completed the last credit review. The system provides the user ID of the person who enters or revises the credit limit.

Financial Statements on Hand   Displays the date that financial statements were received to evaluate a company's credit worthiness.

Dun Bradstreet Date   Displays the date on which Dun & Bradstreet ratings were available.

Experian Date   Displays the date on which the Experian ratings were available.

Tax

Select the Tax tab.

Tax Expl Code (tax   Enter the hard-coded user-defined code (system 00, type EX) that controls the
explanation code)   algorithm the system uses to calculate tax and GL distribution amounts. The
                              system uses the tax explanation code in conjunction with the tax rate area
                              and tax rules to determine how the tax is calculated. You can define each
                              transaction pay item with a different tax explanation code.

Tax Rate/Area   Enter the code that identifies a tax or geographic area that has common tax
                              rates and tax authorities. The system validates the code you enter against the
                              F4008 table. The system uses the tax rate area in conjunction with the tax
                              explanation code and tax rules to calculate tax and GL distribution amounts
                              when you create an invoice or voucher.

Tax Exempt Certificate   Enter the number that tax authorities issue to tax-exempt individuals and
                              companies to identify their tax-exempt status.

G/L Distribution

Select the G/L Distribution tab.

G/L Offset   Enter the code that determines the accounts receivable trade account that the
                              system uses as the offset when you post invoices. The system concatenates
                              the value that you enter to the AAI item RC to locate the trade account. For
                              example, if you enter TRAD, the system searches for the AAI item RCTRAD
                              to locate the account to use for the offset. The value in this field can be
                              alphanumeric or can match the object code of the GL account number. If you
                              leave this field blank, the system uses the account that is set up for RC to
                              locate the account number. You can also use the value in this field to locate the
                              offset for unapplied receipts if you specify its use in the processing options for
                              Standard Receipts Entry or the draft entry programs. Otherwise, the system
                              uses the account that is set up for RCUC. You can override the value of this
                              field when you enter the transaction. Do not use class code 9999; because it is
                              reserved for the post program and indicates that offsets should not be created.

A/R Model JE Document   Enter the code that identifies the type of AR model journal entry to use
Type   for a particular customer.

Account Number   Enter a value that identifies an account in the general ledger. Use one of these
                              formats to enter account numbers:

                              Standard account number (business unit.object.subsidiary or flex format).

                              Third GL number (maximum of 25 digits).

                              Account ID number (eight digits).

                              Speed code, which is a two-character code that you concatenate to the AAI
                              item SP.

                              You can then enter the code instead of an account number. The first character
                              of the account number indicates its format. You define the account format in
                              the General Accounting constants.

Collection

Select the Collection tab.

Collection Manager
Enter the name of the collection manager who is responsible for managing this customer's account. You must set up the collection manager in the address book and then create an entry in the user-defined code table (system 01, type CM). When you set up the user-defined code value, you must also enter the collection manager's address book number in the Description 02 field. You enter the user-defined code that represents the collection manager in this field.

Deduction Manager
Enter the user-defined name or number that identifies an address book record. You can use this field to enter and locate information. If you enter a value other than the address book number (AN8), such as the long address or tax ID, you must precede it with the special character that is defined in the Address Book constants.

Send Statement To
Enter the code that identifies the billing address that prints on statements. Values are:

C: Customer (AN8)

P: Parent (PA8)

R: Payor (PYR)

1: First address number (AN81)

2: Second address number (AN82)

3: Third address number (AN83)

4: Fourth address number (AN84)

5: Factor/Special Payee (AN85)

6: Fifth address number (AN86)

Statement Cycle
Enter the code that enables you to group customers together for statement printing. For example, you can print statements for all customers that have a statement cycle of A on the 1st of the month, B on the 2nd day of the month, and so on. If you leave this field blank, the system assigns the first letter of the customer's alpha name.

Collection Report
Select this option to specify whether the customer's overdue invoices are eligible to appear on the collection report that you send to an external agency. When you select this option, the customer is eligible for external collections. (To update invoices for collection, you must run the program Update A/R from Address Book (R03B802) after you select this option.) When this option is not selected, the customer is not eligible for external collections.

Delinquency Fees
Select this option to specify whether to process delinquency fees for the customer. When this option is selected, delinquency fees are processed.

Print Statement
Select this option to specify whether to print statements for the customer or company. When the option is selected, statements are printed.

Delinquency Notice
Select this option to specify whether to print delinquency notices for the customer or company based on the notification instructions that are set up for the policy that you assign to the customer. When this option is selected, the system prints delinquency notices.

Invoice

Select the Invoice tab.

Payment Instrument	Enter the user-defined code (system 00, type PY) that specifies how payments are made by the customer. For example:

C: Check

D: Draft

T: Electronic funds transfer

Alternate Payor	Enter the person or company (other than the customer) that the system assigns to the Payor field (PYR) on Customer Ledger records (the F03B11 table) that you enter for the customer. If you leave this field blank, the system assigns the customer number as the payor. If you change the value of this field after invoices have been entered for the customer, you must run Update A/R from Address Book (R03B802) to update the value on the invoice records. The system does not use this value as a default for the Payor field (ALKY) in the receipt or draft entry programs, but you can select invoice records to pay based on the value of Payor.

Send Invoice To	Enter the code that identifies the billing name and address to print on the invoice. Codes are:

C: Customer (AN8)

N: Do not print. The Real Estate Management system (15) ignores this value and uses the value of the Print Invoice field (INVP) from the billing record or lease.

P: Parent (PA8)

R: Payor (PYR)

1: First address number (AN81)

2: Second address number (AN82)

3: Third address number (AN83)

4: Fourth address number (AN84)

5: Factor Special/Payee (AN85)

6: Fifth address number (AN86)

With the exception of Payor (which you set up in the customer record in the Alternate Payee field (AYPR),) all of the preceding codes correspond to related address information that you set up in the address book record. Also, if you have a Who's Who entry that is set up with type code B (for billing), the system overrides the billing name with the entry from the Who's Who record.

Auto Receipts Execution List	Enter the name that is assigned to a list of algorithms that define the order in which the programs should be run.
A/B Amount Codes	Enter the code that specifies the currency in which amounts are stored in the address book (for example, the credit limit, invoiced this year, invoiced prior year, and so on). The system uses the currency that you specify to record and store transaction history.

Related Address Number   Enter the related address number in situations where the customer ships to a variety of locations across the country, but wants to send all invoices to a single address.

Invoice Copies   Enter the number of invoice copies that you want to print. The system always prints at least one invoice.

Auto Receipt   Select this option to specify whether the customer or company is eligible to process receipts in the JD Edwards EnterpriseOne Accounts Receivable system using the automatic receipt processing programs. When this option is selected, you can process receipts automatically for the customer or company. You must activate this option for both the customer and the company in the Accounts Receivable constants for the system to process automatic receipts.

Hold Invoices   Select this option to prevent anyone from entering invoices manually. When you select this option, the system holds the invoices and you receive an error message if you attempt to enter invoices using the Speed Invoice Entry (P03B11SI) or Standard Invoice Entry (P03B11) programs. The system ignores this field if you generate invoices from the JD Edwards EnterpriseOne Sales Order Management system.

Invoice Consolidation   Enter the code that indicates whether a customer wants to receive consolidated invoices. Codes are:

Y: Consolidate invoices. If you specify consolidation, the system generates a single invoice from multiple sales orders.

N: Do not consolidate invoices.

Entering Customer Options

Access the Customer - Manage <Customer Name> form, and then click the Customer Options link.

Customer - Manage <Customer Name> form: Customer tab: Customer Options link

Address Type   Enter the code to use this address as a Sold To address, a Ship To address, or both. Codes are:

X: Bill to and a ship to address

S: Ship to address only

B: Bill to address only

Ordering Options

Select the Ordering Options tab.

Minimum Order Value   Enter a value for the order, below which the order is placed on hold. If you attempt to enter an order whose total is less than the minimum order value, the system displays an error message.

Maximum Order Value   Enter a value for the order, above which the order is placed on hold. If you attempt to enter an order whose total is more than the maximum order value, the system displays an error message.

Order Template   Displays a list of items that you order frequently. The system typically groups the items based on the product type, such as fuels, lubricants, and packaged goods.

Item Restrictions   Enter the code that indicates whether restrictions have been placed on the sale of items to this customer. Values are:

                            Blank: No restrictions.

                            I: A customer can be sold only those items set up on the Item Restrictions screen.

                            E: A customer cannot be sold the items set up on the Item Restrictions screen.

Hold Orders Code   Enter the user-defined code (system 42, type HC) that identifies why an order is on hold.

Priority Processing Code View the code indicates how to handle this customer's orders on a priority basis. Use this value to set up print pick slips so you can print them on a priority basis. The system assign this code from the customer billing instructions. In addition, you can use this code to specify sequence for the backorder print report and automatic batch release programs to release those orders with the highest priority first.

Weight Display U/M   Enter the user-defined code (system 00, type UM) that identifies which unit of
(weight display unit of   measure the system uses for this customer to display the weight of individual
measure)   order lines and the order as a whole when you use the order summary form.

Volume Display U/M   Displays the user-defined code (system 00, type UM) that identifies the unit of
(volume display unit of   measure that the system uses to display volume for this branch/plant. The
measure)   system inputs a value in this field from Branch/Plant Constants - Page 2 (P410012). You can override this default value.

OP Business Objective   Displays the value that specifies a default business objective to send outbound
(order promising business   to order promising before an order has been promised. (A business objective is
objective)   a grouping of business rules that fulfill a sales order.) For sales order detail lines, this value specifies the business objective that is selected by order promising after an order has been promised.

Print Message   Displays the user-defined code that you assign to each print message. Examples of text messages include engineering specifications, hours of operation during holiday periods, and special delivery instructions.

Customer PO Required   Specify whether the customer must enter a value in the Customer Purchase Order Number field The system edits this field during Sales Order Entry.

Exempt From Credit Hold Enter the code that indicates whether the customer is exempt from credit checking in the Sales Order Processing cycle. Codes are:

                            Y: Sales order entry should not check the customer's credit.

	N: This customer is not exempt from credit checking. If credit checking is activated through the Sales Order Entry processing options and the customer goes over the limit, the order is put on hold. (You set up a credit limit for the customer in the address book.)
Backorders Allowed	View the option that specifies whether to enable backorders for this item. You can enable backorders for customer using the Customer Billing Instructions program (P03013). When you select this option, the system enables backorders. When you do not select this option, the system does not enable backorders for this item regardless of the backorders code that is assigned to the customer.
Substitutes Allowed	Specify whether the customer accepts substitute items. Enter *N* to disallow or *Y* to enable substitutions. The system interprets a blank value as a *Y*.
COA Print (Certificate of Analysis print)	Enter the code that indicates whether the system prints a Certificate of Analysis for the customer. Values are:
	Y: Print the Certificate of Analysis.
	N: Do not print a Certificate of Analysis for a specific customer when a Certificate of Analysis report is run for a group of customers.
	This feature is activated only when the JD Edwards EnterpriseOne Quality Management system is in use and the Certificate of Analysis is created.
Bypass Audit Logging	Select this option to specify whether to bypass the audit logging process for sales order changes.

Pricing Options

Select the Pricing Options tab.

Pricing Schedule	Enter the user-defined code (system 40, type AS) that identifies a price and adjustment schedule. A price and adjustment schedule contains one or more adjustment types for which a customer or an item might be eligible. The system applies the adjustments in the sequence that you specify in the schedule. You link customers to a price and adjustment schedule through Customer Billing Instructions. When you enter a sales order, the system copies the schedule attached to the sold to address into the order header. You can override this schedule at the detail line level.
Customer Price Group	Enter the user-defined code (system 40, type PC) that identifies a customer group. You can group customers with similar characteristics, such as comparable pricing.
Trade Discount	Enter the percentage amount by which the system reduces the price of each item. This is the only discount applied. You can override the discount if you enter a price. Enter the percentage as a whole number (such as 5 for 5 percent).
Buying Segment Code	Enter the value that groups customers with similar buying habits.
Adjustment on Invoice	Use this field to control whether the system prints price adjustment details on the customer's sales invoice. This field is active only if you are using the Advanced Price Adjustment module (System Code 4010).

Price Pick List	Select this option to indicate whether price information appears on the customer's pick list, purchase order, or sales order. When you select this option, price information appears.

Shipping Options

Select the Shipping Options tab.

Freight Handling Code	Enter the user-defined code (system 42, type FR) that indicates the method by which supplier shipments are delivered. For example, the supplier could deliver to the dock, or you could pick up the shipment at the supplier's dock. You can also use these codes to indicate who has responsibility for freight charges. For example, you can have a code indicating that the customer legally takes possession of goods as soon as they leave the supplier warehouse and is responsible for transportation charges to the destination.
Zone Number	Enter the user-defined code (system 40, type ZN) that indicates the delivery area in which the customer resides. This field is one of several factors that freight summary facilities use to calculate potential freight charges for an order. For picking, you can use the zone code with the route and stop codes to group all items that are to be loaded onto a delivery vehicle for a specific route. You set up the default for each of these fields on the Customer Billing Instructions form.
Carrier Number	Enter the address number for the item's preferred carrier. The customer or the organization might prefer a certain carrier due to route or special handling requirements.
Route Code	Enter the user-defined code (system 42, type RT) that represents the delivery route on which the customer resides. This field is one of several factors that freight summary facilities use to calculate potential freight charges for an order. For picking, use the route code with the stop and zone codes to group all of the items that are to be loaded onto a delivery vehicle for a specific route. You set up a default for each of these fields on the Customer Billing Instruction form.
Stop Code	Enter the user-defined code (system 42, type SP) that represents the stop on a delivery route. This field is one of several factors that freight summary facilities use to calculate potential freight charges for an order. For picking, you can use the stop code with the route and zone codes to group all items that are to be loaded onto a delivery vehicle for a specific route. You set up the default for each of these fields on the Customer Billing Instructions form.
Delivery Instructions	Enter specific delivery instructions.
Partial Shipments Allowed	Select this option to indicate whether the customer accepts partial line shipments. When you select this option, the customer accepts partial line shipments.
Partial Order Shipments Allowed	Select this option to indicate whether the customer requires that the entire order be shipped at one time, or if the customer will accept multiple partial shipments. This feature is activated only when you create orders in the JD Edwards EnterpriseOne Sales Order Management system with availability checking set to On, since sales order entry is the only time that you can group all lines together as an order. If you perform availability checking during the pick slips or shipment confirmation process, you cannot guarantee that all lines are grouped together for the order.

Delivery Note	Select this option to specify whether the system prints delivery notes for this customer on the invoice. When you select this option, the system prints delivery notes on the invoice.
Apply Freight	Select this option to specify whether the system performs freight calculations during processing. When you select this option, the system performs freight calculations during processing.

Entering Service Information for a Customer

Access the Customer - Manage <Customer Name> form, and then click the Service Information link.

To add a flash message, which appears each time a user accesses the customer record, click the Flash Message link and enter the message.

Customer - Manage <Customer Name> form: Customer tab: Service Information link

Contracts	Enter the user-defined code (system 40, type AS) that identifies a price and adjustment schedule. A price and adjustment schedule contains one or more adjustment types for which a customer or an item might be eligible. The system applies the adjustments in the sequence that you specify in the schedule. You link customers to a price and adjustment schedule through the customer billing instructions. When you enter a sales order, the system copies the schedule attached to the sold to address into the order header. You can override this schedule at the detail line level.
Work Orders	Enter the user-defined code (system 40, type AS) that identifies a price and adjustment schedule.
Maintenance Requests	Enter the user-defined code (system 40, type AS) that identifies a price and adjustment schedule.
Default Service Provider	Enter the user-defined name or number that identifies the address book record for the service provider you want to use as the default provider.
Default Dealer	Enter the user-defined name or number that identifies the address book record for the dealer you want to use as the default dealer.
Geographic Region	Enter the customer's geographic region.
Work Order Service Type	Enter the user-defined code (system 00, type TY) that indicates the classification of a work order or engineering change order. You can use work order type as a selection criterion for work order approvals.
Time Zone	Select the time zone for which you want to view the date and time.
Daylight Savings Rule	Enter the rule name that identifies a daylight savings rule. Use daylight savings rules to adjust time for a geographic and political locale.
Standard Center	Enter the unique four-character code assigned to the carrier.
Shipment Tracking	Enter the name of the business function that provides access to a carrier's external shipment tracking function.
Work Center	Enter the alphanumeric code that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant. You can assign a business unit to a document, entity, or person for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business unit to track equipment by responsible department. Business unit security might prevent you from viewing information about business units for which you have no authority.
Responsible Business Unit	Enter the number of the business unit in which the employee generally resides.
Case Category Code 07-10	Enter one or more user-defined category codes used when assigning customer issues.

Using Related Links

Access the Customer - Manage <Customer Name> form, and then click the Related Links link.

Click one of the displayed links to perform the action described to the right of the link name. This table lists available links and their descriptions:

Link Name	Link Description
Additional Information	Review amounts that are invoiced, credit information, orders for the prior year, and orders year to date.
Item Restrictions	Add, copy, or delete item restrictions.
EDI Transaction XRef	Define the EDI transactions the customer implements with the company.
Date Effective Category Codes	Define the Date Effective category codes for this customer/company combination.
Bank Accounts	Add, change, or view bank account information.
Account Status	Review periodic statistics by date range for delinquent balances, average invoice amounts, and discounts.
Credit Insurance	Add, change, or view customer credit insurance.
Customer Ledger Inquiry	Add, change, or view customer ledgers.
Address Book Revision	Change or view customer Address Book information.

Customer - Manage <Customer Name> form: Customer tab: Related Links link

Entering Customer Contacts

Access the Customer - Manage <Customer Name> form. Select the Contact and Partner tab and then click the Contact link.

Customer - Manage <Customer Name> form: Contact and Partner tab: Contact link

1. Find and select the contact whose information you want to view or modify.

2. On Contact - Manage <Contact Name>, view or modify contact information and then save or undo any changes.

   See Chapter 8, "Managing Contacts," page 85.

3. To delete a contact record, select the contact and then click Delete.

4. To add a new contact, select a blank row in the grid and then enter the contact information.

5. When you are finished entering or modifying contact information, click Save Changes.

Attaching Partners to a Customer

Access the Customer - Manage <Customer Name> form's Contact and Partner tab and then click the Partner link.

Customer - Manage <Customer Name> form: Contact and Partner tab: Partner link

1. In the grid, click the link for the partner whose information you want to view or modify.

2. On Address Book Revision, view or modify partner information.

3. To assign a new partner, click the Assign Partners button, find and select the partner on the Link Partners form, and click Select.

    The system populates the grid with the selected partners.

4. To remove a partner, select the partner and then click Remove.

Adding Activities to a Customer

Access the Add Activity form.

Add Activity form

Time Date Start and **End Date Range**	Enter the beginning date for the date range, or the ending date for the date range within which the activity occurs.
Activity Type	Enter the user-defined code that defines the type of activity.
Calendar Type	Enter the user-defined code that defines the type of calendar, such as personal calendar, customer calendar, CRM calendar, and so on.
Priority Level	Enter the user-defined code that indicates the activity's level of importance or commitment. Values are:

1: High

2: Medium

3: Low

Date Completed	Enter the time and date when the activity was completed.
Subject	Enter a subject for the activity that appears in daily, weekly, or monthly calendar views.

Creating Customer Profiles

Access the Customer - Manage <Customer Name> form. Select the Detail tab and click the Profile link.

Customer - Manage <Customer Name> form: Detail tab: Profile link

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Note. You can configure each field on this form to store the data that the organization wants to track for each customer. Before you enter data on this form, you should define the needs of the organization, and configure the fields accordingly. Typically, the system administrator is responsible for configuring user-defined fields.

See *JD Edwards EnterpriseOne Tools 8.98 System Administration Guide*

Working With Customer Interactions

The Customer application is integrated with a third-party interaction product from Apropos Technologies, Inc. which helps you manage contact information. The integrated solution provides a foundation of predefined database queries, screen pops, and other integration points that reduce the cost and development time of customer-specific implementations.

When you click the Interactions link on the Activities tab on the Customer - Manage <Contact Name> form, a separate browser window opens containing the Apropos interaction application.

See The Apropos Website at www.apropos.com.

Reviewing Sales Information for Customers

This section provides an overview of sales information and discusses how to:

• Review sales team information.

• Review customer opportunities.

• View the pipeline.

• Review quotes or sales orders.

Understanding Sales Information

For a sales organization, easy access to a customer's sales-related information is critical. Sales information includes:

• Sales team.

  You can review all of the members, both past and present, of a customer's sales team. You can also review detailed information about each member of the sales team, such as their role and commission setup.

• Sales opportunities.

  You can review all of the active sales opportunities that are associated with a customer, including the potential sales amount of each opportunity.

• Pipeline.

  You can review, at a glance, the total amount of potential revenue that is currently in process for a customer.

• Sales orders and quotes.

  You can review all of the quotes and sales orders that are associated with a customer. You can also view detailed information about each record, such as the status, ship date, and backorder information.

See Also

JD Edwards EnterpriseOne Customer Relationship Management 9.0 Sales Applications Implementation Guide, "Managing the Sales Force," Adding Sales Team Members to Territories and Industry Groupings

JD Edwards EnterpriseOne Customer Relationship Management 9.0 Sales Applications Implementation Guide, "Managing Sales Opportunities"

Forms Used to Review Sales Information

Form Name	FormID	Navigation	Usage
Search for Customer	W90CA080D	CRM Foundation Daily Processing (G90C01), Customer	Select a customer.
Customer - Manage <Customer Name>	W90CA08AA	Select a customer on the Search for Customer form.	View a customer record.
Sales Team Search and Select	W90CA041A	From the Customer - Manage <Customer Name> form, select the Sales tab, then click the Sales Team link. Click the Assign Sales Team button.	Select a sales team or sales team member.
Edit Sales Team	W90CA08AB	From the Customer - Manage <Customer Name> form, select the Sales tab, then click the Sales Team link. Click the sales team member or sales group name, or select a sales group and click Sales Group Details.	View or modify sales team information.
Edit Sales Order	W42101D	From the Customer - Manage <Customer Name> form, select the Sales tab, and then click Quote or Sales Order. Select the order that you want to review.	View or modify an existing sales order.

Reviewing Sales Team Information

Access the Customer - Manage <Customer Name> form.

1. Select the Sales tab, and then click the Sales Team link.

2. Find and select the sales team whose information you want to review, and then click Sales Group Details.

3. On Edit Sales Team, review or modify sales team information.

4. To manually assign a sales team member to the customer, click Assign Sales Team and then select a sales team member on the Sales Team Search and Select form.

Note. If you manually add sales team members to the customer, and you use the automated sales team alignment process, you must select the Sales Team Override option on the Customer - Manage <Customer Name> form. If you do not select this option, the system deletes all manual additions from the sales team during the next automated alignment, and reassigns sales team members based on territory and industry information.

See *JD Edwards EnterpriseOne Customer Relationship Management 9.0 Sales Applications Implementation Guide*, "Managing the Sales Force".

5. To view, modify, or delete commissions, click Commissions to access the Customer Master Commission Lookup form.

Reviewing Customer Opportunities

Access the Customer - Manage <Customer Name> form.

1. Select the Sales tab and then click the Opportunity link.

2. Find and select the opportunity that you want to review.

3. On Opportunity - Manage <Opportunity Name>, view or modify the opportunity information.

4. To convert the opportunity to a quote or sales order, click Convert to Quote or Convert to Sales Order, respectively.

   Be sure that you are familiar with the opportunity conversion process before you click these buttons.

   See *JD Edwards EnterpriseOne Customer Relationship Management 9.0 Sales Applications Implementation Guide*, "Managing Sales Opportunities".

5. When you are finished viewing or modifying the opportunity, save any changes and then click Close.

Viewing the Pipeline

Access the Customer - Manage <Customer Name> form. Select the Sales tab and then click the Pipeline link to view pipeline information.

Customer - Manage <Customer Name> form: Sales tab: Pipeline link

Reviewing Quotes and Sales Orders

Access the Customer - Manage <Customer Name> form. Select the Sales tab, and then click either the Quote or Sales Order link.

1. In the grid, find and select the quote or sales order that you want to review.

2. On Edit Sales Order, view or modify quote or sales order information.

3. When you are finished viewing or modifying quote or sales order information, click Close to return to the Customer - Manage <Customer Name> form.

   See *JD Edwards EnterpriseOne Sales Order Management 9.0 Implementation Guide*, "Entering Sales Orders".

Reviewing Service Information For Customers

This section discusses how to:

• Review equipment master information.

• Review service contract information.

• Review case information.

• Review service work order information.

Forms Used to View or Modify Service Information

Form Name	FormID	Navigation	Usage
Search for Customer	W90CA080D	CRM Foundation Daily Processing (G90C01), Customer.	Select a customer.
Customer - Manager <Customer Name>	W90CA08EA	On the Search for Customer form, select a customer.	Review customer information.

Reviewing Equipment Master Information

Access the Customer - Manage <Customer Name> form.

Customer - Customer - Manage Capital Company

| Customer | Contact and Partner | Activities | Sales | **Service** | Attachments |

Equipment Master | Service Contract | Case | Service Work Order

[Add]   [Close]

[Find]

Records 1 - 10 ▶ ▶|

Asset Number	Description	Customer Number	Site Number	Serial Number
43094	TV Set	4242	4242	12345A
43107	Phone Switch	4242	4242	4567A
47845	Deluxe Pager	4242	4242	N 20
48864	Entitlement testing	4242	4242	852258
49138	Test Equipment	4242	4242	258852
50526	Phone Mail	4242	4242	258741
50534	Phone Mail	4242	4242	985698
50542	Phone Mail	4242	4242	147741
50753	Phone Mail	4242	4242	1547854
52206	Phone Mail	4242	4242	963258

Customer - Manager <Customer Name> form: Service tab: Equipment Master link

1. Select the Service tab and then click the Equipment Master link.
2. Click the record's link under the Asset Number column to select an equipment record in the grid.
3. Review, and if necessary, modify the information.
4. Save the changes before exiting the form.

Reviewing Service Contract Information

Access the Customer - Manager <Customer Name> form.

Customer - Customer - Manage Capital Company

Customer | Contact and Partner | Activities | Sales | **Service** | Attachments

Equipment Master | **Service Contract** | Case | Service Work Order

| Add | Close |

Search

Equipment Number		Customer Number	4242
Inventory Item Number	*	Site Number	*
Product Model	*	Contract Start Date	*
Product Family	*	Contract Completion Date	*

Select a Query [▼] Save Query Edit Queries

| Find |

Records 1 - 10 ▶ ▶|

Order Number ⇕	Or Ty ⇕	Description ⇕	Contract Change Number ⇕	Customer Number ⇕	Site Number ⇕	Line Number ⇕	Ln Ty
1	CM	TV Set	001	4242	4242	0.001	BV
1	CM	Phone Switch	001	4242	4242	0.002	BV
1	CM	Deluxe Pager	001	4242	4242	0.003	BV
1	CM	Phone Mail	001	4242	4242	0.004	BV

Customer - Manager <Customer Name> form: Service tab: Service Contract link

1. Select the Service tab and then click the Service Contract link.

2. Select the service contract for which you want to view or modify service.

   Make changes on the Customer - Contract Revisions form.

3. On Customer - Contract Revisions, review or modify the information.

4. Save changes before exiting the form.

See *JD Edwards EnterpriseOne Service Management 9.0 Implementation Guide*, "Managing Contracts".

Reviewing Case Information

Access the Customer - Manage <Customer Name> form. and select the Service tab.

1. Select the Service tab and then click the Case link.

2. In the grid, search for and select the case whose information you want to view or modify.

3. On Case Update, view or modify case information.

4. When you are finished viewing or modifying case information, save or undo any changes, and then click Close.

See *JD Edwards EnterpriseOne Customer Relationship Management Support Applications 9.0 Implementation Guide*, "Entering Cases".

Reviewing Service Work Order Information

Access the Customer - Manager <Customer Name> form.

1. Select the Service tab and then click the Service Work Orders link.

2. Select the service work order that you want to review.

3. On the Customer - Work Order Revisions form, review or modify the information, and save all changes before you exit the form.

4. To add a service contract, click Add and enter information on the Add Work Order form.

See *JD Edwards EnterpriseOne Service Management 9.0 Implementation Guide*, "Managing Work Orders".

CHAPTER 7

Managing Partners

This chapter provides an overview of partner information and discusses how to:

• Enter basic partner information.

• Manage partner information.

Understanding Partner Information

You use the Address Book Revisions program (P01012) to enter and maintain partner information. The P01012 helps you manage partner information by providing you with this functionality:

• Add new partner records.

• View partners who are previously associated with customers, employees, items, sales leads, cases, opportunities, or activities.

• View and assign partner contacts to cases, opportunities, or activities.

• Create and maintain partner detail information, including single or multiple addresses, single or multiple contacts, notes, and attachments through JD Edwards EnterpriseOne Address Book.

• Modify or delete partner information as needed through Address Book.

The P01012 enables you to view partners who are currently assigned to a customer, employee, item, sales lead, case, opportunity, or activity. You can also assign a partner to a customer, employee, item, sales lead, case, opportunity, or activity, or remove an assignment.

See *JD Edwards EnterpriseOne Address Book 9.0 Implementation Guide*, "Entering Address Book Records," Entering Address Book Records.

View Partners

You can view general partner information or detailed information for a partner that has been associated with a customer, employee, item, or sales lead. In addition, you can view just the name, city, and state of the partner assigned to a case, opportunity, or activity.

You can access partner records from customer, employee, item, lead, case, opportunities, and activity records. You view partners or partner information by launching the appropriate application. For example, to view partner information that is associated with an item, launch the Item Inquiry application and locate the appropriate item record.

If a partner has not been associated with a customer, employee, item, sales lead, case, opportunity, or activity, there is no partner for that record.

You use the Find function to view partner information in the Employee, Customer, Leads, and Items application. This feature does not locate all partners in the system, but it helps you locate one or more specific partners that are already assigned to the employee, customer, lead, or item. For example, if you have dozens of partners that are associated to an item, you can use the find feature to locate the partners in a particular state or city. To do so, enter the search parameters in the grid and click Find.

From the Employee, Customer, Leads, Item Inquiry, or Opportunity applications, you can access the Address Book Revision form for the partner. Use this form to view, add, revise or delete partner information. You can also view, add, revise or delete contacts by selecting Who's Who from the Row menu.

From the Opportunity, Case Entry, and Activity applications, you can view only the name of the partner that is currently assigned to the opportunity, case, or activity. And, if there are contacts associated with the partner, you can view the current contact.

Entering Basic Partner Information

This section provides an overview of partner entry, lists a prerequisite and discusses how to add a new partner record.

Understanding Partner Entry

You use the Address Book Revisions program (P01012) to enter and maintain information about partners. When you enter address book records, you define the type of record by adding a search type to the record. Typically, you use search type *PA* for partners. A version of the P01012 that is set up to automatically use search type PA is attached to the CRM Foundation Daily Processing menu (G90C01).

See Also

JD Edwards EnterpriseOne Address Book 9.0 Implementation Guide, "Entering Address Book Records," Entering Address Book Records

Prerequisite

Set the processing options for the Address Book Revisions program (P01012).

See *JD Edwards EnterpriseOne Address Book 9.0 Implementation Guide*, "Entering Address Book Records," Setting Processing Options for Address Book Revisions (P01012).

Form Used to Enter Partners

Form Name	FormID	Navigation	Usage
Partner - Work With Addresses	W01012B	CRM Foundation Daily Processing (G90C01), Partner	Find existing partners or access forms to add new partners.
Partner - Address Book Revision	W01012A	On Partner - Work With Addresses, click Add.	Enter basic partner information.

Adding a New Partner Record

Access the Partner - Work With Addresses form.

Partner - Address Book Revision form

Address Book

Address Number	Enter the number that identifies an entry in the JD Edwards EnterpriseOne Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or location.
Alpha Name	Enter text that names or describes an address. This 40-character alphabetic field appears on a number of forms and reports. You can enter dashes, commas, and other special characters, but the system cannot search on them when you use this field to search for a name.
Long Address Number	Enter the user-defined name or number that identifies an address book record. When you set up suppliers using a long address number, you can access the supplier number more quickly. For example, when you enter a voucher, you use the long address number preceded by the special character assigned to long address numbers in Address Book constants in the Supplier Number field. The system converts the long address number to the supplier number.
Tax ID	Enter the identification code required by various tax authorities. For US employees, the Tax ID is a social security number. For Canadian employees, the Tax ID must be a valid and unique Social Insurance Number (SIN).
Search Type	Enter the user-defined code (01/ST) that specifies the kind of address book record to search for. This value must be PA for partner.

Business Unit	Enter the alphanumeric code that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant. You can assign a business unit to a document, entity, or person for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business unit to track equipment by responsible department. Business unit security might prevent you from viewing information about business units for which you have no authority.

Mailing

Mailing Name	Enter the company or person to whom billing or correspondence is addressed.
Address Lines 1–4	Enter the mailing address for an employee, customer, or supplier in the JD Edwards EnterpriseOne Address Book system.
Effective Date	Enter the date on which an address, item, transaction, or table record becomes active.

Additional 1

Payables Y/N/M	Enter the code that identifies the address as a supplier. Values are:
	Y: Yes, this is a supplier. A processing option specifies whether the supplier master record appears automatically after you add an address.
	N: No, this is not a supplier. This code does not prevent you from entering a voucher for the address. Code N is informational only unless you set a processing option. In this case, a warning message appears if both the Payables and Receivables fields are N.
	M: This is a miscellaneous, one-time supplier. This code does not prevent you from entering multiple vouchers for the address.
	F: This is a supplier with a foreign address. The IRS requires U.S. companies to identify suppliers with foreign addresses for 1099 reporting. You should assign tax authorities as suppliers. This enables tax payments to be made to tax authorities.
Employee Group Approvals	Enter the Employee Group used only in Approval Processing
AR/AP Netting	Select this option to indicate whether you can use an address in the AR and AP netting process. When this option is selected, AR/AP Netting can be used.
Add'l Ind Tax ID	Enter the identification number assigned by a tax authority to an individual, in addition to the primary Tax ID number (TX1).
Tax Exempt Certificate	Enter the number that tax authorities issue to tax-exempt individuals and companies to identify their tax-exempt status.
Person/Corporation Code	Enter the code that designates the type of taxpayer. For 1099 reporting for U.S. suppliers and foreign suppliers, the system chooses only records with a code of P or N. Values for U.S. entities are:
	Blank or *C*: Corporate entity (the Tax ID prints as 12-3456789)
	P: Individual (the Tax ID prints as 123-45-6789)

N: Noncorporate entity (the Tax ID prints as 12-3456789)

Values for non-U.S. entities are:

1: Individual

2: Corporate entity

3: Both an individual and a corporate entity

4: Noncorporate entity

5: Customs authority

Credit Message   Enter a value in the user-defined code table 00/CM that indicates the credit status of a customer or supplier. Examples are:

1: Over credit limit

2: Requires purchase order

3: Not on contract maintenance agreement. The credit message displays on inquiry and transaction entry forms in Oracle's JD Edwards EnterpriseOne Accounts Payable, JD Edwards EnterpriseOne Sales Order Management, and JD Edwards EnterpriseOne Procurement systems. The system displays the temporary credit message in the JD Edwards EnterpriseOne Accounts Receivable system.

Language   Enter the user-defined code (01/LP) that specifies the language to use on forms and printed reports. Before you specify a language, a code for that language must exist at either the system level or in the user preferences.

Industry Classification   Enter a code that classifies goods and services. This code can be in the format of any one of the these classification systems:

Standard Industrial Classification (SIC) or North American Industry Classification System (NAICS). A numerical system used in the United States to classify goods and services. This code is four (SIC) or six (NAICS) digits.

Harmonized System (HS). The international method of classifying goods. This code can be up to 10 digits.

Standard Industrial Trade Classification (SITC). A numerical code system developed by the United Nations to classify goods used in international trade. International organizations use this code. This code can be up to six digits.

Receivables Y/N   Select this option to indicate that the record is a customer.

User Code   Select this option to identify information that is pertinent to the business. No predefined definitions exist for this option.

Subledger Inactive Code   Select this option to indicate whether a specific subledger is inactive. Examples of inactive subledgers are jobs that are closed, employees who have been terminated, or assets that have been disposed. When this option is selected, the subledger is inactive.

Employee Y/N   Select this option to indicate whether this record represents an employee.

Additional 2

Classification Code 01–05   Enter any codes used to classify an address book entity.

Ticker	Enter the stock ticker symbol for the company.
Stock Exchange	Enter the exchange under which the company's stock is listed.
Year Started	Enter the year in which the company became a customer.
Revenue Range	Enter the company's revenue range.
Growth Rate	Enter the customer's growth rate.
Number of Employees	Enter the number of people employed by the customer or supplier.
DUNS Number	Enter the Dun and Bradstreet identifier used to receive credit reports for companies.

Related Address

Parent Number	Enter the parent company's address book number. The system uses this number to associate a particular address with a parent company or location. Any value that you enter in this field updates the Address Organizational Structure Master table (F0150) for the blank structure type. This address number must exist in the Address Book Master table (F0101) for validation purposes. Examples of address book records that would have a parent number include:
	Subsidiaries with parent companies.
	Branches with a home office.
	Job sites with a general contractor.
1st Address Number	Enter an alternate address number that has been entered in the JD Edwards EnterpriseOne Address Book system. You can use this field for any secondary business address that relates to the primary address, such as a salesperson, law firm, accountant, securities agent, or bonding agent. If you leave this field blank on an entry form, the system supplies the primary address from the Address Number field.
2nd Address Number	Enter a second alternate address number that has been entered in the JD Edwards EnterpriseOne Address Book system.
3rd Address Number	Enter a third alternate address number that has been entered in the JD Edwards EnterpriseOne Address Book system.
4th Address Number	Enter a fourth alternate address number that has been entered in the JD Edwards EnterpriseOne Address Book system.
5th Address Number	Enter a fifth alternate address number that has been entered in the JD Edwards EnterpriseOne Address Book system.
Factor/Special Payee	Enter a number that identifies a special payment address for accounts payable. This number must exist in the Address Book Master table (F0101) for validation purposes. If you leave this field blank on an entry form, the system supplies the primary address from the Address Number field.

Cat Codes

Category Code	Enter one of thirty reporting codes that you can assign to an address in the JD Edwards EnterpriseOne Address Book system. Use these codes to group

address book records for reports, mailings, and so on. Category codes are user defined (system 01, types 01 through 30).

Managing Partner Information

This section provides an overview of partner management and discusses how to:

• Assign partners to employees, customers, leads or items.

• Assign partners to cases, opportunities or activities.

• Assigning partner contacts to cases or activities.

• Assigning partner contacts to opportunities.

Understanding Partner Management

After you enter partners into the system, you can track and maintain information about those partners. You can associate a partner with a customer, employee, item, lead, opportunity, case, or activity. You can also remove a partner that was previously assigned. For cases, opportunities, and activities, you are limited to one partner and one contact. For employees, customers, leads and items, you can assign multiple partners and contacts.

For employees, customers, leads, and items, you create or remove partner associations on the same forms that you use to view partners who are currently assigned to the employee, customer, sales lead, or item. On these forms, click the Assign Partners and Remove buttons to assign or remove a partner for the currently selected employee, customer, sales lead, or item.

For cases, opportunities, and activities, you create the association using the visual assist for the Partner fields on the Case Management, Opportunity, and Activity forms.

Form Used to Manage Partner Information

Form Name	FormID	Navigation	Usage
Partner - Work With Addresses	W01012B	CRM Foundation Daily Processing (G90C01), Partner	Find existing partners or access forms to add new partners.
Partner - Address Book Revision	W01012A	On Partner - Work With Partner, select the partner you want to review.	Find and select a partner.
Search for Employee	W90CA040F	CRM Foundation Daily Processing (G90C01), Employee	Select an employee.
Employee - Manage <Employee Name>	W90CA04RA	On Search for Employees, select an employee, select the Customer and Partner tab, and then click the Partner link	Assign a partner to an employee or view currently assigned partners.
Search for Customers	W90CA080D	CRM Foundation Daily Processing (G90C01), Customer	Select a customer.

Page Name	Definition Name	Navigation	Usage
Customer - Manage <Customer Name>	W90CA08RA	On Search for Customers, select a customer, select the Contact and Partner tab, and then click the Partner link.	Assign a partner to a customer or view currently assigned partners.
Search for Leads	W90CB010A	Daily Sales Force Automation Processing (G90CA01), Lead	Select a lead
Lead - Manage <Lead Name>	W90CB010L	On Search for Leads, select a lead, then select the Contact and Partner tab, and then click the Partner link.	Assign a partner to a lead or view currently assigned partners.
Search For Items	W90CA100D	CRM Foundation Daily Processing (G90C01), Item Inquiry	Select an item.
Item - Manage <Item Name>	W90CA109A	On Search For Items, select an item and then click the Partner tab.	Assign a partner to an item or view currently assigned partners.
Search For Opportunities	W90CB020D	Daily Sales Force Automation Processing (G90CA01), Opportunity	Select an opportunity.
Opportunity - Manage <Opportunity Name>	W90CB020A	On Search For Opportunities select an opportunity.	View or update the partner and partner contact currently assigned to the opportunity.
Partner Search & Select	W90CA050A	On Opportunity - Manage <Opportunity Name>, click the visual assist at the Partner field.	Find and select a partner to associate to the opportunity.
Search For Activities	W01301E	CRM Foundation Daily Processing (G90C01), Activity	Select an activity.
Activity - Edit <Activity Name>	W01301B	On Search For Activities, select an activity and then click the Partner Contact link.	View or modify the partner contact.
Work With Case Management	W17500A	Daily Case Processing (G17132), Case Entry.	Select a case.
Case Entry - Manage Case	W90CG501J	On Work With Case Management, select a case and then select the Additional Information tab.	View the partner and partner contact associated with a case.

Assigning Partners to Employees, Customers, Leads, or Items

Access the appropriate form for employees, customer, leads, or items:

• Employee - Manage <Employee Name>, Customer and Partner tab.

- Customer - Manage <Customer Name>, Contact and Partner tab.
- Lead - Manage <Lead Name>, Contact and Partner tab.
- Item - Manage <Item Name>, (Partner tab).

    1. Click the Partner Number link.

    2. Click Assign Partners.

    3. On the Link Partners form, find and select the partner that you want to assign.

To remove a partner assignment, select the partners to remove and click Remove on the Employee, Customer, Lead, or Item Inquiry form.

Assigning Partners to Cases, Opportunities, or Activities

Access the appropriate form for cases, opportunities, or activities:

- Case - Manage <Case Name>, Additional Information tab.
- Opportunity - Manage <Opportunity Name>.
- Activity - Edit <Activity Name>.

    1. Click the visual assist for the Partner field to display the Partner Search and Select form.

    2. Find and select the partner to assign to the case, opportunity, or activity.

    3. Click Close to exit the Partner Search and Select form.

    4. To remove a partner who is assigned to a case, opportunity, or activity, clear the entry in the Partner field on the Case Entry, Opportunity, or Activity form.

Assigning Partner Contacts to Cases or Activities

Access the appropriate form for cases or activities:

- Case - Manage <Case Name> (Additional Information tab)
- Activity - Edit <Activity Name>

    1. Click the visual assist for the Contact field to display the Partner Contact Search and Select form.

    2. Find and select the contact to assign to the case or activity.

    3. Click Close to exit the Partner Contact Search and Select form.

    4. To remove a partner contact who is assigned to a case or activity, clear the entry in the Contact field on the Case Entry or Activity form.

Assigning Partner Contacts to Opportunities

Access the Opportunity - Manage <Opportunity Name> form.

    1. If there are multiple contacts, the drop-down list next to the Contact field is enabled.

       This is the Contact field on the same line as the Partner field, *not* the Contact field on the line with the Ship To or Sold To fields. Select from the drop-down list the contact whose information you want to assign to the opportunity.

    2. Click Save Changes.

3. To remove a partner contact who is assigned to an opportunity, select the Select One option from the Contact field list.

CHAPTER 8

Managing Contacts

This chapter provides an overview of contact information and discusses how to:

• Enter contact information.

• Manage contact information.

• Manage contact activities.

Understanding Contact Information

Contacts are the people who are associated with the organization's customers and partners. You use the CRM Contact program (P90CA070) to enter contacts and to view and modify existing contact information.

The CRM Contact program is also an entry point for the Email Merge and Mail Merge features. These features enable you to create customized email messages and letters for a selected group of contacts. Before you can use either of these features, you must create at least one contact.

Contact information includes:

• Basic contact information.

 You can enter the contact's name, position, address and phone information. You can also associate the contact with other related people.

• Activity information.

 You can create activities for a contact, or attach existing activities to the contact. Activities enable the organization to complete tasks in a timely manner.

• Sales information.

 You can review the sales pipeline, sales opportunities, sales quotes, and sales orders that are associated with the contact.

• Service information.

 You can review the cases that are associated with the contact.

• Attachments.

 You can view, modify, or enter attachments for the contact.

• Subscriptions.

 You can subscribe to the contact to add the information about that contact to the personal information management (PIM) system, such as Lotus Notes or Microsoft Outlook.

 See *JD Edwards EnterpriseOne Address Book 9.0 Implementation Guide*, "Synchronizing Address Book Records with Personal Information Management Systems".

- Profiles.

  Because each organization's business needs differ, it is impossible to anticipate every piece of data that you must track for the contacts. To enable you to track contact information that is specific to the organization, the JD Edwards EnterpriseOne Customer Relationship Management Foundation system provides you with configurable, user-defined contact profiling. You can access up to 30 user-defined fields using the Profiles link on the Contact - Manage <Contact Name> form. You can configure these fields to track information that is specific to the business and is not otherwise captured in the JD Edwards EnterpriseOne system.

Entering Contact Information

This section provides an overview of contact information, and discusses how to:

- Enter contacts.
- Set processing options for the CRM Contact program (P90CA070).

Forms Used to Enter Contact Information

Form Name	FormID	Navigation	Usage
Search for Contacts	W90CA070C	CRM Foundation Daily Processing (G90C01), Contact	Select an existing contact, or access forms to add new contacts.
Add Contact	W90CA070A	Click Add on Search for Contacts.	Enter contact information.

Entering Contacts

Access the Add Contact form.

Add Contact form

Alpha Name	Enter up to 40 alphabetic characters for the contact name. You can enter dashes, commas, and other special characters, but the system does not use them when you search for a name.
Mailing Name	Enter a mailing name which represents the company or person to whom billing or correspondence is addressed.
Title	Enter the professional title of the contact as it appears in the Who's Who table.
Address Type	Enter the user-defined code (system 01, type AT) that identifies the type of address, such as a home address or an office address.
Phone Number Type	Enter the user-defined code (system 01, type PH) that indicates either the telephone's location or use, such as a business phone or home phone.
Function	Enter the user-defined code (system 01, type FC) that indicates the function that the contact serves in the company, such as consultant, manager, or staff.
Department	Enter the department in which the contact works.
Reports To	Enter the name of the person to whom the contact reports. This field is informational only and not used in any reports.

Category Code 001-020   Enter user-defined information in any of the category code fields. You can also use these fields to represent associated names in the Who's Who list. You can use these codes to identify names for special mailing lists, phone directories, and so on.

Setting Processing Options for the Manage Contacts Application (P90CA070)

Although processing options are set up during JD Edwards EnterpriseOne implementation, you can change processing options each time you run a program.

Versions

1. Contact Detail Processing (P90CA074) Version   Specify the version of Contact Detail Processing (P90CA074) to use. If this processing option is blank, the system uses version *ZJDE0001*.

2. Sales Order Entry (P42101) Version   Specify the version of Sales Order Entry (P42101) to use. If this processing option is blank, the system uses version *ZJDE0001*.

3. Quote Order Entry (P42101) Version   Specify the version of Quote Order Entry (P42101) to use. If this processing option is blank, the system uses version *ZJDE0001*.

4. Opportunities (P90CB020) Version   Specify the version of Opportunities (P90CA020) to use. If this processing option is blank, the system uses version *ZJDE0001*.

5. Activities Extension (P90CAEXT) Version   Specify the version of Activities Extension (P90CAEXT) to use. If this processing option is blank, the system uses version *XJDE0001*.

Mobile Client

If you plan to use the disconnected mobile client, you must enter options on the Mobile Client tab that affect that functionality.

1. Contact Action Security (Add, Change, and Delete) , **2. Alternate Address Action Security (Add, Change, and Delete)**, **3. Phone and Fax Action Security (Add, Change, and Delete)**, **4. Electronic Address Action Security (Add, Change, and Delete)**, **5. Related People Action Security (Add, Change, and Delete)**, and **6. Related People Phone and Fax Action Security (Add, Change, and Delete)**   Specify whether a user has the authority to add, change, or delete contact information, alternate addresses, contact phone and fax numbers, electronic addresses, related people, or phone and fax numbers for related people while running on a mobile client.

Managing Contact Information

This section provides an overview of contact management and discusses how to:

• Modify contact address information.

• Modify contact phone and electronic address information.

• Enter related people for a contact.

• Manage contact interactions.

• Create contact profiles.

Understanding Contact Management

After you enter contacts into the system, you must maintain the records to ensure that the information in the system is current. You can modify address, phone, and email information for each contact. You can also associate contacts with related people such as employees, partner contacts, or customer contacts.

You can also subscribe to one or more contacts. Subscribing to a contact enables users to add contact information to their personal information management (PIM) systems, such as Lotus Notes or Microsoft Outlook.

See *JD Edwards EnterpriseOne Address Book 9.0 Implementation Guide*, "Synchronizing Address Book Records with Personal Information Management Systems".

You can create contact profiles for each contact to store additional information that is not already maintained in the JD Edwards EnterpriseOne system. Profiles enable you to track the information that is critical to the organization's business needs by providing up to 30 configurable fields to store user-defined data.

Lastly, you can manage contact interactions using a third-party system, Apropos. Apropos enables you to manage and schedule each interaction with a contact.

See The Apropos website at www.apropos.com for more information about the integrated interaction product.

Forms Used to Manage Contact Information

Form Name	FormID	Navigation	Usage
Contact - Search For Contacts	W90CA070C	• Daily Sales Force Automation Processing (G90CA01), Contact. • CRM Foundation Daily Processing (G90C01), Contact. • Daily Support Processing (G90CE01), Contact.	Find and select the contact whose information you want to view.
Contact - Manage <Contact Name>	W90CA070B	On Search for Contacts, select a contact.	View contact information.
Contact - Add Related Person	W90CA073B	On the Contact - Manage <Contact Name> form, select the Contact tab, click Related People and then click Add.	Add a related person to the contact.

Modifying Contact Address Information

Access the Contact - Manage <Contact Name> form.

1. On the Contact tab, click the Address and Phone link.

2. To modify an existing address record, select the record in the Alternate Addresses grid and then make changes in the grid fields.

3. To delete an address record, select the record in the Alternate Addresses grid and then click Delete.

4. To add address information, select a blank line in the grid and enter address information in the grid fields.

5. If there is more than one address for the contact, select an address and click Set Main Address to specify the main address.

   The address that you select is indicated in the Main Address Flag field.

6. To change the main address status, select a different address and click Set Main Address.

   The system clears the previous main address and selects the new main address. To clear the main address setting without specifying a main address, click the Clear Main Address button.

Contact - Manage <Contact Name> form: Contact tab: Address and Phone link

Modifying Contact Phone and Electronic Address Information

Access the Contact - Manage <Contact Name> form and click the Address and Phone link.

1. To modify an existing telephone or fax record, select the record in the Phones and Fax grid and then make changes in the grid fields.

2. To delete a telephone or fax entry, select the record in the Phones and Fax grid and then click Delete.

3. To enter a new enter telephone or fax record, select a blank row in the grid and then enter the phone or fax information in the grid fields.

4. To modify an existing electronic address record, select the record in the Electronic Addresses grid and then make changes in the grid fields.

5. To delete an electronic address record, select the record in the Electronic Addresses grid and then click Delete.

6. To enter a new electronic address record, select a blank row in the grid and then enter the electronic address information in the grid fields.

7. If you have previously created an email message for the contact, you can click Send Email to send the email to electronic addresses that you just added.

Enter Related People for a Contact

Access the Contact - Manage <Contact Name> form's Contact tab, and then click the Related People link.

Contact - Manage <Contact Name> form: Contact tab: Related People link

1. To modify an existing related person record, select the record in the Related People grid and then make changes in the grid fields.

   Alternatively, you can click a record's link to modify information, but if you are using the Mobile Client feature, you cannot modify server synchronization information.

2. To delete a related person record, select the record in the Related People grid and then click Delete.

3. To modify phone information for the related person, click the record and make changes on the Contact - Manage Related Person form.

4. To add a related person, click Add and then enter related person information on the Contact - Add Related Person form.

Managing Contact Interactions

The Contact application is integrated with a third-party interaction product from Apropos Technologies, Inc. which helps you manage contact information. The integrated solution provides a foundation of predefined database queries, screen pop-ups, and other integration points that reduce the cost and development time of customer-specific implementations.

When you click the Interactions link on the Contact - Manage <Contact Name> form's Activities tab, a separate browser window opens containing the Apropos interaction application.

See The Apropos Website at www.apropos.com for more information about the integrated interaction product.

Creating Contact Profiles

Access the Contact - Manage <Contact Name> form. Select the Detail tab and click the Profile link.

Contact - Contact - Manage Bob Willis

| Contact | Activities | Sales | Service | Attachments |

Detail | Address and Phone | Related People | **Profile**

[Save Changes]   [Undo Changes]   [Close]

Profiling - UDC 1	-- Select One --	Profiling - UDC 9	-- Select One --
Profiling - UDC 2	-- Select One --	Profiling - UDC 10	-- Select One --
Profiling - UDC 3	-- Select One --	Profiling - UDC 11	-- Select One --
Profiling - UDC 4	-- Select One --	Profiling - UDC 12	-- Select One --
Profiling - UDC 5	-- Select One --	Profiling - UDC 13	-- Select One --
Profiling - UDC 6	-- Select One --	Profiling - UDC 14	-- Select One --
Profiling - UDC 7	-- Select One --	Profiling - UDC 15	-- Select One --
Profiling - UDC 8	-- Select One --		

Profiling - Text 1

Profiling - Text 1

Profiling - Text 3

Profiling - Text 4

Profiling - Text 5

Contact - Manage <Contact Name> form: Detail tab: Profile link

Note. You can configure each field on this form to store the data that the organization must track for each contact. Before you enter data on this form, you should define the needs of the organization, and configure the fields accordingly. Typically, the system administrator is responsible for configuring user-defined fields.

See *JD Edwards EnterpriseOne Tools 8.98 System Administration Guide*

Managing Contact Activities

This section provides an overview of contact activities and discusses how to:

• View or modify contact activities.

• Add a new activity for the contact.

• Link the activity to an action plan.

• View or modify contact email.

Understanding Contact Activities

The fields, grids, and links on the Activity tab enable you to view or modify activities that relate to the contact. You can also add a new activity by accessing the Activities application.

Similarly, you can access the email application to view or modify email messages that were created as activities for the contact. (*Only* the email messages that were created as an activity for the contact are displayed on the Activities tab).

The Activities tab also enables you to link a selected activity with an action plan.

Forms Used to View and Modify Activity Information

Form Name	FormID	Navigation	Usage
Contact - Search For Contacts	W90CA070C	• Daily Sales Force Automation Processing (G90CA01), Contact. • CRM Foundation Daily Processing (G90C01), Contact. • Daily Support Processing (G90CE01), Contact.	Find and select the contact whose information you want to view.
Contact - Manage <Contact Name>	W90CA070B	On Search for Contacts, select a contact.	View contact information.
Activity - Edit	W01301B	Select an activity record on Contact - Manage <Contact Name> form, Activities tab, Activity link.	View or modify activity information.
Add Activity	W01301B	On the Contact - Manage <Contact Name> form's Activities tab, click Add.	Add a new activity for the contact.
Contact - Manage <Contact Name> Activities tab (Email link)	W90CA07EA	Click Email on the Activities tab.	View email information related to the contact.
Action Plan Search and Select	W01401A	On the Contact - Manage <Contact Name> form's Activities tab, click Link Action Plan.	Find and select the action plan to which you want to link the activity.

Viewing or Modifying Contact Activities

Access the Contact - Manage <Contact Name> form (Activities tab).

1. If necessary, use the fields in the Search area of the form to limit search results.

   At a minimum you might specify the activity type before searching.

2. When you locate the activity record whose information you want to view or modify, select the record and click Select. (Alternatively, you can click the record's link under the Activity Type column heading.)

3. On Activity - Edit, view or modify the activity.

   At this point you are in the Activities application.

4. Click Save and Close or Cancel to return to the Contact - Contact - Manage <Contact Name> form.

Contact - Manage <Contact Name> form: Activities tab: Activities link

See *JD Edwards EnterpriseOne Address Book 9.0 Implementation Guide*, "Using Foundation Calendar," Managing Activities.

Adding a New Activity for the Contact

To add a new activity for a contact, access the Add Activity form. This form is part of the Activities application, but after you create the activity, the system associates it with the contact.

Add Activity form

Linking the Activity to an Action Plan

Access the Contact - Manage <Contact Name> form and click the Activities tab.

1. In the grid, find and select the activity that you want to link to an action plan, and then click Link Action Plan.

2. On the Action Plan Search and Select form, find and select the action plans to which you want to link the activity, and then click Select.

Action Plan Search & Select form

Viewing or Modifying Contact Email

Access the Contact - Manage <Contact Name> form's Activities tab, and then click the Email link.

1. To select the email message you want to view or modify, click that specific email link under the Subject column.

2. On Email - Manage <Email Name>, view or modify the email as needed.

3. When you are finished viewing or modifying, save or undo any changes and then send the email or close.

CHAPTER 9

Using Call Plans

This chapter provides an overview of call plans and discusses how to:

• Create new call plan templates.

• Work with call plan templates.

Understanding Call Plans

Call plans enable sales representatives making customer calls to view a template containing question prompts, goals, and reminders. You first create call plan templates to meet the business needs, and then you can attach them to activities and action plans within the Calendar system.

Creating New Call Plan Templates

This section provides an overview of call plan templates and describes how to create a new call plan template.

Understanding Call Plan Templates

Use the Call Plan program (P90CA65) to create call plan templates for different purposes. For example, you might have a new customer template, a template for introducing new products, one for unhooking competitors' customers, and so on.

The only required field when creating a new template is the Name field. However, you might also want to enter values in the Purpose and Premise fields, as these fields appear on the grid when you search for call plan templates from the Activity and Action Plan programs.

When you create a call plan template, you can specify whether to make it the default template. When you select the Default Template check box, the current template becomes the default template.

Forms Used to Create New Call Plan Templates

Form Name	FormID	Navigation	Usage
Search For Call Plan	W90CA65F	Sales Force Automation Setup (G90CA03), Call Plan	Find and select the call plan you want to use, modify, or delete.
Add Call Plan	W90CA65B	Click Add on the Search For Call Plan form.	Add a new call plan.

Creating a New Call Plan Template

Access Add Call Plan.

Add Call Plan form

Default Template	Specify whether you want to make the template the default template.
Name	Enter a unique name for the call plan template.
Purpose	Summarize the purpose of the template.
Ask	Enter any business, technical and functional questions to ask the customer.
Action	Enter any tasks to perform after the call, such as a product demonstration.
Attitude	Enter the attitude or perception you would like the customer to have after the call is completed.
Ability	Enter examples and tasks that demonstrate the ability to meet the customer's needs.
Premise	Enter the broader purpose of the call, such as to establish a long term relationship.

Working With Call Plan Templates

This section provides an overview of how to work with call plans, lists a prerequisite, and discusses how to attach a call plan to an activity.

Understanding Working With Call Plans

After creating call plan templates, you can attach them to activities that you create within the Calendar system. When creating the activity, you can set up recurrence patterns and reminders, and you can assign the activity to others. If a particular call plan is part of a group of standard activities that would be performed for multiple customers, you can create an action plan that includes the call plan activity. Action plans are groups of related activities that can be used as templates.

When viewing the call plan templates from within either an activity or action plan, you can make changes to any of the template fields. For example, when you are speaking with a customer, you might think of additional questions that you would like to ask other customers. When you save the changes, the system attaches a copy of the call plan template to the activity or action plan, and the original call plan template is not affected.

See *JD Edwards EnterpriseOne Address Book 9.0 Implementation Guide*, "Using Foundation Calendar," Understanding Foundation Calendar.

See *JD Edwards EnterpriseOne Address Book 9.0 Implementation Guide*, "Using Foundation Calendar," Managing Activities.

See *JD Edwards EnterpriseOne Address Book 9.0 Implementation Guide*, "Using Foundation Calendar," Creating Action Plans.

Prerequisite

Before you complete the steps in this section, you must set the processing options for the Activity View program.

See *JD Edwards EnterpriseOne Address Book 9.0 Implementation Guide*, "Using Foundation Calendar," Setting Processing Options for Activity View (P01301).

Forms Used to Work with Call Plan Templates

Form Name	FormID	Navigation	Usage
Edit <Call Name>	W01301B	• Daily Sales Force Automation Processing (G90CA01), Activity. Select the *Call* activity type and click Find on the Search for Activities form. Select the desired activity. • Daily Sales Force Automation Processing (G90CA01), Calendar. Click the activity link on the Calendar form.	Review the activity and click Call Plan to view the call plan template.
Manage <call plan name>	W90CA65C	Click Call Plan on the Edit <call plan name> form.	Review the call plan template. Change the call plan template for this activity only.
Add Activity	W01301B	Click Add Activity on the Search for Activities form.	Add a new activity and attach a call plan.
Call Plan Template Select	W90CA65E	Click Call Plan. on the Edit <Activity Name> form.	Select the call plan template to use for the activity.

Attaching a Call Plan to an Activity

Access the Add Activity form.

Add Activity (1 of 2)

Add Activity (2 of 2)

With the exception of the Call Plan field, the fields that appear on Add Activity form are the same as those that appear when you access the form from the Activity View program (P01301) on the Foundation Calendar menu (G01A).

Activity Type	Select an activity type of *Call.*After you attach a call plan to the activity, you cannot change the activity type.
Call Plan	Select a call plan for the activity. The system displays this field only when you have selected *Call* as the activity type.
	After you have saved the activity, subsequent inquiries on the activity will display Call Plan as a link that you can click to view the call plan template.

See *JD Edwards EnterpriseOne Address Book 9.0 Implementation Guide*, "Using Foundation Calendar," Managing Activities.

CHAPTER 10

Using Email and Mail Merge

This chapter provides an overview of email and mail merge, and discusses how to:

• Manage email groups.

• Manage emails.

• Use the Email Merge feature.

• Use the Mail Merge wizard.

Understanding Email and Mail Merge

The email feature is integrated into the JD Edwards EnterpriseOne system and enables you to send email messages to groups or individuals without using a separate program, such as Microsoft Outlook or Lotus Notes. You can send saved messages and create new messages, and you can vary the recipients.

Rather than specifying long lists of email recipients, you can easily create groups that are comprised of individuals or subgroups. For example, you might create a groups for customers, local or regional associates, or employees in the department.

As business needs change, you can modify email groups.

If you routinely send mass emails or regular mailings, the Email Merge and Mail Merge features might be beneficial.

The Mail Merge feature is driven by a wizard that guides you through the process of selecting a template and configuring it for the mailing. This process is similar to the one that is used by the Proposal Generation feature.

Email merge works like a traditional mail merge, enabling you to create personalized communications that automatically retrieve information from the JD Edwards EnterpriseOne system such as the recipient's name, address, and so on.

Managing Email Groups

This section provides an overviews of email groups and discusses how to:

• Create email groups.

• Maintain email groups.

Understanding Email Groups

The Email Group application enables you to create new email groups and add or remove individuals from groups.

You create new email groups in two steps: first create the group, and then add to the group the subgroups or individuals who will be included in the email's distribution when it is sent.

If you are adding one or more subgroups to a new group, it might be helpful to think in terms of hierarchy. For example, suppose you want to create a group that includes the entire sales force. The Entire Sales Force email group might consist of groups for the southern, northern, eastern, central, and western regions. However, there might be times when you want to send emails only to the western and northern sales regions, so you would still need to maintain those smaller email groups in addition to the group that includes the whole sales force.

Note. Before you create email groups you must create records in the Who's Who table (F0111) for the individuals that you want to include in the group. You can only include individuals or groups who have a record in the F0111 with a line type greater than zero (0). You can create these records by entering a contact in the CRM system, or by entering a who's who record directly into the Address Book system.

Additionally, an electronic address (email address) must exist in the F0111) for any individual that you include in an email group. You can set up the email address when you enter the contact information in the CRM system or when you enter the who's who information in the Address Book system.

See Also

Chapter 8, "Managing Contacts," Entering Contact Information, page 86

JD Edwards EnterpriseOne Address Book 9.0 Implementation Guide, "Entering Address Book Records," Adding Who's Who Information to Address Book Records

Forms Used To Manage Email Groups

Form Name	FormID	Navigation	Usage
Search for Email Groups	W90CA510C	Sales Force Automation Setup (G90CA03), Email Group	Select an existing email group, or access forms to create a new group.
Add Email Group	W90CA510I	Click Add on the Search for Email Groups form.	Create an email group.
Email Group - Manage <Group Name>	W90CA510B	Select an email group on the Search for Email Groups form.	Maintain an email group.

Creating Email Groups

Access the Add Email Group form.

Add Email Group form

To create an email group:

1. Enter the group name and type, and enter any comments for the group.

2. Click the button corresponding to the action that you want to take:

    • Save and Close (save and return to the Email Group - Search For Email Groups form).

    • Save and Continue (save and continue creating the current email group).

    • Save and Add New (save and clear the form to create a new email group).

    • Cancel (discard the new email group and return to the Email Group - Search For Email Groups form).

Maintaining Email Groups

Access the Search For Email Groups form.

To add or remove a person from a group:

1. Find and select the group to which you want to add subgroups or individuals.

2. On the Email Group - Manage <Group Name> form, click Add Email Group to add a subgroup to the new group.

3. On Search for Email Groups, find and select the subgroups that you want to add to the new group.

4. On Email Group - Manage <Group Name>, click Add Person to add individuals to the new group.

5. On Search For Individuals, find and select individuals to add to the new group.

6. If you want to remove a subgroup or person from the new group, select the groups or persons and then click Remove Email Group or Remove Person.

Email Group - Manage <Group Name> form (1 of 2)

Email - Manage <Group Name> form (2 of 2)

Managing Emails

This section provides an overview of the email application and discusses how to:

• View and modify existing email information.

• Create email messages.

• Create email attachments.

• Add or remove distribution groups and individuals.

• Send emails.

• Track sent emails.

Understanding the Email Application

You can use the email application to view previously created email messages, or to create new email messages, which you can send when you choose. You can create a variety of template messages for notification or information, and then create distribution lists according to timing or product interest.

Distribution lists can consist of groups or individuals, and you can easily remove a group or individual that is currently on the distribution list for a particular message.

If the email requires an attachment, you can easily add additional text on the email record's Attachment tab. You can also attach an image, spreadsheet, video clip, or other media object.

After you have created an email, you determine when the message is sent to the server for distribution to the groups or individuals that you specified. After you submit the email for distribution, you can check delivery status periodically.

Forms Used to Use the Email Application

Form Name	FormID	Navigation	Usage
Search for Emails	W90CA500E	• Daily Sales Force Automation Processing (G90CA01), Email • Daily Support Processing (G90CE01), Email	Find and select existing email messages.
Add Email	W90CA500C	• On the Search for Emails form, click Add. • Click Create Email on the Email Group - Manage <Group Name> form.	Add a new email.
Email - Manage <Email Name>	W90CA500A	On the Search for Emails form, select a previously created email message.	View or modify email information, and add or remove an email group or person.
Member For <Email Group Name>	W90CA510E	Click the link for an email group record on the Email - Manage <Email Name> form's Email Group List grid.	View email group detail information.
Individual Summary	W90CA510H	Click the link for an individual record on the Email - Manage <Email Name> form's Person List grid.	View individual email recipient detail information.

Viewing and Modifying Existing Email Information

Access the Email - Manage <Email Name> form.

Email - Manage <Email Name> form

1. On the Email - Manage <Email Name> form's Detail tab, view or modify the email subject and message body on the top portion of the form.

2. In the Email Group List and Person List grids, view or modify email groups and individual email recipients already added to the email message.

3. To view or modify information about a specific email group or person, click the link for the group or person in the Email Group List and Person List grids.

4. To view or modify attachment information for the email message, select the Attachments tab.

5. If you want to send separate emails to individual recipients, select Send individual email to recipients.

   If you do not select this option, the system sends one email message containing a list of all recipients in the To field, and all recipients can see the other recipient names.

6. If you want to create an activity for each person in the Person List grid, select the option Create activity for contacts.

7. When you are finished viewing email information, save or undo any changes that you made, and then click Close.

Creating Email Messages

Access the Add Email form.

Add Email form

1. Complete the Subject and Body fields for the message.

2. Click the button corresponding to the action that you want to take:

    • Save and Close (save and return to the Email - Search For Emails form).

    • Save and Continue (save and continue creating the current email).

    • Save and Add New (save and clear the form to create a new email).

    • Cancel (discard the new email and return to the Email - Search For Emails form).

3. If you plan to use the Email Merge feature, you must select the option Send individual emails to recipients.

    If you do not select this option, the Email Merge feature may not function correctly.

Creating Email Attachments

Access the Email - Manage <Email Name> form.

1. Find and select the email to which you want to add an attachment.

2. Select the Attachments tab.

3. To add supplemental text to the attachment, enter the text in the text box on the form.

4. To attach a document, image, URL, or other media object, click the media object button (the magnifying glass and document) to launch the Media Objects application.

5. Click Save Changes or Undo Changes, and when you are finished, click Close.

See *JD Edwards EnterpriseOne Tools 8.98 Foundation Guide*

Adding or Removing Distribution Groups and Individuals

Access the Email - Search For Emails form.

1. Select the email for which you want to create a distribution.

2. On Email - Manage <Email Name>, click Add Email Group to add a group of email recipients.

3. On Search for Email Groups, find and select the groups that you want to add to the email.

4. On Email - Manage <Email Name>, click Add Person to add individual email recipients for the email.

5. On Search For Individuals, find and select individuals to receive the email.

6. If you want to remove an email group or person from the distribution list, select the groups or persons and then click Remove Email Group or Remove Person.

Sending Emails

Access the Search For Emails form.

1. Find and select the email that you want to send.

2. On Email - Manage <Email Name>, make any final modifications to the subject, email message, or distribution list.

3. Click Send Email to send the email message.

Tracking Sent Emails

Access the Search For Emails form.

Search for Emails form

1. Find the email message for which you want to check a status.

2. In the grid area, scroll to the right until you reach the Status column, which displays the current status for all emails that you found.

Using the Email Merge Feature

This section provides an overview of the Email Merge feature and discusses how to:

• Set up an email merge for contacts or employees.

• Insert tokens in the email body.

Understanding Email Merges

You access the Email Merge feature from the Contact or Employee applications. This feature is integrated into the email application, so you set up an email merge on the same form where you enter or modify email messages.

When you set up an email merge, you insert tokens into the email body. These tokens are replaced by the system with information from the Address Book and Who's Who tables. When used in conjunction with the Email Group application, the Email Merge feature enables you to create a single email message that is sent to the individuals and subgroups in the email distribution list. However, if you include a token in the salutation, when the recipient receives the email message it contains the recipient's name instead of "Dear Sir or Madame." You use other tokens for addresses, telephone numbers, or any other information in the Address Book or Who's Who tables.

Forms Used to Use the Email Merge Feature

Form Name	FormID	Navigation	Usage
Contact - Email and Mail Merge Utility	W90CA070D	Daily Sales Force Automation Processing (G90CA01), Contact CRM Foundation Daily Processing (G90C01), Contact Daily Support Processing (G90CE01), Contact On the Search For Contacts form (W90CA070C), click the Email and Mail Merge Utility link.	Locate contacts and access the Email Merge feature.
Email - Manage <Email Name>	W90CA500A	On the Contact - Email and Mail Merge Utility form or the Employee - Email and Mail Merge Utility form, click Email Merge.	Create a new email.
Employee - Email Merge	W90CA040E	Periodic Sales Force Automation Processing (G90CA02), Employee CRM Foundation Daily Processing (G90C01), Employee On the Search For Employees form (W90CA040F), click the Email Merge Utility link.	Locate employees and access the Email Merge feature.
Employee - Email - Manage	W90CA500A	On the Employee - Email Merge form, find and select an employee, and then click Email Merge.	Select an employee and launch the email application.

Setting Up an Email Merge for Contacts or Employees

For contacts, access the Contact - Email and Mail Merge Utility form.

For employees, access the Employee - Email Merge form.

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1. Find and select the contacts or employees for whom you want to create the email merge, and then click Email Merge.
2. On Contact - Email - Manage (or Employee - Email - Manage for employees), enter the email subject, body, and other fields on the upper half of the form as you would for a normal email message.
3. Add or remove subgroups or individuals from the distribution list.
4. Insert the tokens that you want to include in the body of the email.

See Chapter 10, "Using Email and Mail Merge," Inserting Tokens in the Email Body, page 116.

5. Click Send Email to send the message immediately, or to save the message for sending at a later time or date, click Save Changes.

Note. Before you run the email merge, verify on the Email - Manage <Email Name> form that you selected the option Send individual emails to recipients. If you did not select this option, the Email Merge feature may not operate correctly.

Inserting Tokens in the Email Body

You can insert fields from the Address Book (F0101) or Who's Who (F0111) tables in the email body as a token, and the token will appear as entered when email recipients open the email. When you insert a token, be sure to surround the token with brackets on both sides, as in {*token*}.

Currently, all fields in the F0101 and F0111 tables support the Email Merge feature. Fields added to these tables after the general availability date may not support email merge. If you insert an unsupported token, the token will not be substituted with information from the Address Book or Contact tables.

The table lists the most commonly used tokens that you can insert into the body of an email message.

Token Name	Token Description	Token Source
Address Number	ABAN8	Address Book table (F0101)
Address Number	WWAN8	Who's Who table (F0111)
Alpha Name	ABALPH	Address Book table (F0101)
Title	WWATTL	Who's Who table (F0111)
Alpha Name	WWALPH	Who's Who table (F0111)

Using the Mail Merge Wizard

This section provides an overview of mail merges and discusses how to:

• Create mail merge and envelope templates.

• Process a mail merge.

Understanding Mail Merges

The Mail Merge feature enables you to create documents, envelopes, and labels in PDF format that can be used to do a mail merge. Mail Merge uses a wizard that guides you through the mail merge process, from selecting a template, generating envelopes or labels, viewing a preview of the generated mail merge document, and finalizing the process.

Mail Merge is template-driven, and you assemble the merge document by using only the template components that you need.

Mail Merge templates can reside on a local machine or on a server. Templates created by the template creation program are saved on the server, but you can maintain local copies of the template.

Templates stored on the server are kept in the same location, which means that when you do a mail merge there is no distinction between a template created as a Mail Merge document, envelope, or label. Consequently, when you create Mail Merge templates you should assign names that will help you remember the template's purpose when you do a mail merge.

You use data sets and simple templates to set up mail merge and envelope templates. You use the same programs and processes to create templates for mail merges as you do for proposal generation. The only difference in the setup for mail merge or envelope/label templates is the template type. You use these template types for mail merge and envelope/label templates:

• *MM:* Use this template type when creating mail merge templates.

• *EN:* Use this template type when creating envelope/label templates.

After you set up mail merge templates, you can run a mail merge. You access the Mail Merge feature from the Contact application. Before you launch the Mail Merge wizard, you must first select the contacts for whom you want to produce the Mail Merge document or envelope. Each of the contacts selected must have an address that has been flagged as the main address.

The Mail Merge wizard validates all of the data against the document and envelope templates. If data is missing, those rows are displayed but not included in the mail merge. (For example, the surname might be included in the template, but there is no system data for the surname.) The only exception for missing data is address lines 2, 3, and 4. In this case, the rows that are missing the address line data are not displayed, but are included in the mail merge.

See Also

JD Edwards EnterpriseOne Customer Relationship Management 9.0 Sales Applications Implementation Guide, "Generating Sales Proposals"

Forms Used to Use the Mail Merge Wizard

Form Name	FormID	Navigation	Usage
Mail Merge Setup	W90CA242B	Sales Force Automation Setup (G90CA03), Mail Merge Setup	Access forms to set up mail merge templates.
Envelope/Label Setup	W90CA242B	Sales Force Automation Setup (G90CA03), Envelope/Label Setup	Access forms to set up envelope and label templates.
Search For Contacts	W90CA070C	Daily Sales Force Automation Processing (G90CA01), Contact CRM Foundation Daily Processing (G90C01), Contact	Locate and view contacts, and access the Email and Mail Merge Utility form.
Contact - Email and Mail Merge Utility	W90CA070D	On the Search For Contacts form, click the Email and Mail Merge Utility link.	Search for the contacts and launch the Mail Merge wizard.
Contact - Mail Merge Wizard - Select Template	W90CA23BA	On the Contact - Email and Mail Merge Utility form, click Mail Merge.	Specify whether you are using local or central templates for the mail merge.
Mail Merge Wizard - Select Central Template	W90CA23BB	Click Next on the Contact - Mail Merge Wizard - Select Template form.	Select a centrally located template.
Mail Merge Wizard - Select Local Template	W90CA23BC	Click Next on the Contact - Mail Merge Wizard - Select Template form.	Select a local template.
Mail Merge Wizard - Select Envelope Template	W90CA23BD	Click Next on the Mail Merge Wizard - Select Central Template or Mail Merge Wizard - Select Local Template form.	Select an envelope or label template.
Generating Mail Merge	W90CA23BJ	Click Next on the Mail Merge Wizard - Select Envelope Template form.	Finalize the mail merge process.

Creating Mail Merge and Envelope Templates

Access the Mail Merge Setup form.

To create Mail Merge templates, you use the same processes and programs that are used to create proposal generation templates. The process for creating Mail Merge templates is nearly identical to creating proposal generation templates. The only difference is that Mail Merge templates use the template type *MM* for Mail Merge and *EN* for envelopes.

The table lists the fields that can be inserted into a Microsoft Word RTF document when you create a Mail Merge or envelope and label template. During the mail merge process the token is replaced with information from the system:

Token Name	Token Description	Source
PMMAddressLine1	WLADD1	F01161
PMMAddressLine2	WLADD2	F01161
PMMAddressLine3	WLADD3	F01161
PMMAddressLine4	WLADD4	F01161
PMMCountry	WLCTR	F01161
PMMState	WLADDS	F01161
PMMCity	WLCTY1	F01161
PMMZipCodePostal	WLADDZ	F01161
PMMCountyAddress	WLCOUN	F01161
PMMCompanyName	WWALPH	F0111
PMMMailingName	WWMLNM	F0111
PMMContactTitle	WWATTL	F0111
PMMSalutationName	WWSLNM	F0111
PMMGivenName	WWGNNM	F0111
PMMMiddleName	WWMDNM	F0111
PMMSurname	WWSRNM	F0111
PMMSecondaryMailingName	WWMLN1	F0111
PMMNickName	WWNICK	F0111

Required System Setup

To process mail merge templates and view the generated PDF documents, you must first set up information in the JD Edwards EnterpriseOne system. Typically, the system administrator is responsible for setting up this information. Contact your system administrator or customer support for assistance with these setup tasks.

System setup includes:

Setup Step	Description
Enter the mail merge file location in the JDE.ini file.	To generate mail merge documents, set this setting in the jde.ini file: `[MAILMEGE] File Location=C:\WINNT\TEMP` After you add this setting to the jde.ini file, you must restart JD Edwards EnterpriseOne services to generate mail merge documents.
Create a folder called MailMerge under the webclient.war directory.	To view generated PDF documents, you must create this folder within the JAS server instance. For example: `x:\WebSphere\AppServer\installedApps\`⇒ `[machine_name]\EA_JS_[99]_[machine_`⇒ `name].ear\`⇒ `webclient.war\MailMerge`
Specify the location of the mail merge folder in the jas.ini file.	After you create the MailMerge folder, you must specify the location of the folder in the jas.ini folder using this setting: `[MAIL MERGE AND DOC GEN] MailMerge`⇒ `Location= x:\`⇒ `WebSphere\AppServer\installedApps\`⇒ `[machine_name]\`⇒ `EA_JS_[99]_[machine_name].ear`⇒ `\webclient.war\`⇒ `MailMerge`

See Also

JD Edwards EnterpriseOne Customer Relationship Management 9.0 Sales Applications Implementation Guide, "Generating Sales Proposals"

Processing a Mail Merge

Access the Contact - Email and Mail Merge Utility form.

1. Find and select the contacts for whom you want to do the mail merge.

   Note. All of the contacts listed in the grid on the Contact - Email and Mail Merge Utility form are included in the mail merge, so before continuing make sure the appropriate contacts are listed.

2. On the Contact - Mail Merge Wizard - Select Template form, specify whether the template you want to use is located on the local machine or on a central server.

3. If you are using a template located on a central server, On the Mail Merge Wizard - Select Central Template form, find and select the template that you want to use.

   If you are using a local template, specify the template name and then click Upload Template on the Mail Merge Wizard - Select Local Template form.

4. If you want to produce an envelope or label, select Mail Merge Generate Envelopes/Labels on the Mail Merge Wizard - Select Envelope Template form, and then specify whether the envelope template is on a central server or the local machine.

5. If you are using an envelope template located on a central server, find and select the template that you want to use on the Mail Merge Wizard - Select Central Envelope or Label Template form.

    If you are using a local envelope template, specify the template name and then click Upload Template on the Mail Merge Wizard - Select Local Envelope or Label Template form.

6. While the letters and envelopes are generating, the Generating Mail Merge form appears; click Next to continue.

7. On the Mail Merge Wizard - View form, click View Letters or View Envelopes/Labels to view the generated mail merge letters or envelopes respectively.

    To view letters and envelopes, you must have Adobe Acrobat Reader or some other application capable of displaying PDF files.

8. To make modifications to either letters or envelopes, click Previous until you reach the appropriate form where you can make changes.

9. When you are satisfied with the generated letters and envelopes, save them in the Adobe Acrobat Reader application.

    After saving, click Finish on the Mail Merge Wizard - View form.

Warning! Be sure to save the merged letters and envelopes or labels before you click Finish. If you click Finish before saving in the Adobe Acrobat Reader application, the information that you entered to create the generated letters and envelopes will not be saved, and you must create them again.

APPENDIX A

JD Edwards EnterpriseOne CRM Fundamentals Reports

This appendix provides an overview of CRM Fundamentals reports and allows you to:

• View summary tables of all reports.

• View detailed information about selected reports.

JD Edwards EnterpriseOne CRM Fundamentals Reports: A to Z

This table lists the CRM Fundamentals reports, sorted alphanumerically by report ID.

Report ID and Report Name	Description	Navigation
R90CA0101E Employee Phone List Report	This report includes all active employees in the system, along with their titles and phone numbers.	Employee (G90CA0207), select Employee Phone List
R90CA0111A Contacts for a Customer Report	This report lists each contact, along with the associated contact information for each selected customer.	Customer (G90CA0206), select Contacts by Customer
R90CA014A Action Plan List Report	This report includes summary information about all action plans, such as the description of the plan, and the list of included activities. The report also includes additional information about each activity, such as the activity type, the assignee, when the activity should begin, and when the activity should be completed.	Action Plan/Activity (G90CA0204), select Action Plan Listing.
R90CA01B Partner Listing Report	This report includes all partners in the system, along with summary information about each partner, such as the name, address, contact information, and URL.	Partner (G90CA0208), select Partner List

Report ID and Report Name	Description	Navigation
R90CA070AA Contact Summary Shipping - Avery 5163 Report	This report produces shipping labels for each contact in the system in Avery 5163 label format. The report includes each contact's name, company name, street address, city, state, postal code, and country.	Contact (G90CA0209), select Contact Address Shipping (Avery 5163)
R90CA070B Contact Summary Shipping - Avery 5160 Report	This report produces mailing labels for each contact in the system in Avery 5160 label format. The report includes each contact's name, company name, street address, city, state, postal code, and country.	Contact (G90CA0209), select Contact Address (Avery 5160)
R90CA070C Contact Avery 5161 Report	This report produces mailing labels for each contact in the system in Avery 5161 label format. The report includes each contact's name, company name, street address, city, state, postal code, and country.	Contact (G90CA0209), select Contact Address (Avery 5161)
R90CA080B Customer/Contact Summary Report	This report includes summary information for all customer records in the system. The report includes the associated contact names for each customer, along with information for each contact.	Customer (G90CA0206), select Customer Contact Summary
R90CA080G Customer Summary - Selected Report	This report includes summary information about selected customers, such as sales team members, opportunities, and contacts.	Customer (G90CA0206), select Customer Summary
R90CA1301B Activities for a Customer Contact Report	This report includes all assigned activities for each customer. The activities are grouped by customer, and include the activities contact name, phone number, description, date scheduled, start time, and activity type.	Action Plan/Activity (G90CA0204), select Activities By Customer
R90CA13D Periodic Planner Report	This report displays selected users schedules, including activities and to do items, for a specified period of time. The report also includes all related details for each activity or to do item.	Action Plan/Activity (G90CA0204), select Activity - Periodic Planner
R90CA55CAT Product Catalog List Report	This report includes all product catalogs, along with the available products associated with each catalog.	Product Catalog (G90CA02010), select Product Catalog List

JD Edwards EnterpriseOne CRM Fundamentals: Selected Reports

These reports are listed alphanumerically by report ID in this appendix.

R90CA0101E - Employee Phone List Report

This report includes all active employees in the system, along with their titles and phone numbers.

Processing Options for the Employee Phone List Report (R90CA0101E)

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

Defaults

These processing options specify default information that is used to process the report.

1. Enter Search Type for an Employee: Use this processing option to specify the search type that is used to identify employees. Values are stored in UDC (01/ST).

2. Enter Phone Number Type for Business Phone: Use this processing option to specify the phone number type that is used to specify the employee phone number that you want to print on the report. Values are stored in UDC (01/PH).

R90CA0111A - Contacts for a Customer Report

This report lists each contact, along with the associated contact information for each selected customer.

Processing Options for the Contacts for a Customer Report (R90CA0111A)

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

Defaults

These processing options specify default information that is used to process the report.

1. Enter Phone Number Type for Business phone: Use this processing option to specify which customer phone number to print on the report. Values are stored in UDC (01/PH).

2. Enter Phone Number Type for Fax number: Use this processing option to specify which customer fax number to print on the report. Values are stored in UDC (01/PH).

3. Enter Type - Address for Work address: Use this processing option to specify which customer address to print on the report. Values are stored in UDC (01/AT).

R90CA080B - Customer/Contact Summary Report

This report includes summary information for all customer records in the system. The report includes the associated contact names for each customer, along with information for each contact.

Processing Options for the Customer/Contact Summary Report (R90CA080B)

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

Defaults

These processing options specify default information that is used to process the report.

1. Enter Phone Number Type for Business phone:
Use this processing option to specify which customer phone number to print on the report. Values are stored in UDC (01/PH).

2. Enter Electronic Address Type for Internet Address (url):
Use this processing option to specify which customer URL to print on the report. Values are stored in UDC (01/ET).

3. Enter Electronic Address Type for Email address:
Use this processing option to specify which customer email address to print on the report. Values are stored in UDC (01/ET).

4. Enter Type - Address for Work address:
Use this processing option to specify which customer address to print on the report. Values are stored in UDC (01/AT).

R90CA1301B - Activities For A Customer Contact Report

This report includes all assigned activities for each customer. The activities are grouped by customer, and include the activities contact name, phone number, description, date scheduled, start time, and activity type.

Processing Options for the Activities For A Customer Contact Report (R90CA1301B)

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

Defaults

These processing options specify default information that is used to process the report.

1. Enter Phone Number Type for Business phone:
Use this processing option to specify which customer phone number to print on the report. Values are stored in UDC (01/PH).

R90CA13D - Periodic Planner Report

This report displays selected users schedules, including activities and to do items, for a specified period of time. The report also includes all related details for each activity or to do item.

Processing Options for the Periodic Planner Report (R90CA13D)

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

Process

These processing options specify the dates that are used when creating the report.

1. Enter Start Date:	Use this processing option to specify the beginning date in the date range for which you want to track lead information. If you leave this option blank, the system uses today's date.
2. Enter End Date:	Use this processing option to specify the end date in the date range for which you want to track lead information. If you leave this option blank, the system uses today's date.

Print

These processing options specify the types of information to print on the report.

1. Include "Task" Section:	Use this processing option to specify whether the system prints the Task section on the report. If you leave this option blank, the system includes the Task section and the Activities section on the report. If you enter 1 in this option, the system includes only the Activities section on the report. Values are:
	Blank: Include Task Section.
	1: Do Not Include Task Section.

Glossary of JD Edwards EnterpriseOne Terms

Accessor Methods/Assessors	Java methods to "get" and "set" the elements of a value object or other source file.
activity rule	The criteria by which an object progresses from one given point to the next in a flow.
add mode	A condition of a form that enables users to input data.
Advanced Planning Agent (APAg)	A JD Edwards EnterpriseOne tool that can be used to extract, transform, and load enterprise data. APAg supports access to data sources in the form of rational databases, flat file format, and other data or message encoding, such as XML.
alternate currency	A currency that is different from the domestic currency (when dealing with a domestic-only transaction) or the domestic and foreign currency of a transaction.

In JD Edwards EnterpriseOne Financial Management, alternate currency processing enables you to enter receipts and payments in a currency other than the one in which they were issued. |
Application Server	Software that provides the business logic for an application program in a distributed environment. The servers can be Oracle Application Server (OAS) or WebSphere Application Server (WAS).
as if processing	A process that enables you to view currency amounts as if they were entered in a currency different from the domestic and foreign currency of the transaction.
as of processing	A process that is run as of a specific point in time to summarize transactions up to that date. For example, you can run various JD Edwards EnterpriseOne reports as of a specific date to determine balances and amounts of accounts, units, and so on as of that date.
Auto Commit Transaction	A database connection through which all database operations are immediately written to the database.
back-to-back process	A process in JD Edwards EnterpriseOne Supply Management that contains the same keys that are used in another process.
batch processing	A process of transferring records from a third-party system to JD Edwards EnterpriseOne.

In JD Edwards EnterpriseOne Financial Management, batch processing enables you to transfer invoices and vouchers that are entered in a system other than JD Edwards EnterpriseOne to JD Edwards EnterpriseOne Accounts Receivable and JD Edwards EnterpriseOne Accounts Payable, respectively. In addition, you can transfer address book information, including customer and supplier records, to JD Edwards EnterpriseOne. |
| **batch server** | A server that is designated for running batch processing requests. A batch server typically does not contain a database nor does it run interactive applications. |
| **batch-of-one immediate** | A transaction method that enables a client application to perform work on a client workstation, then submit the work all at once to a server application for further processing. As a batch process is running on the server, the client application can continue performing other tasks.

See also direct connect and store-and-forward. |
| **best practices** | Non-mandatory guidelines that help the developer make better design decisions. |

BPEL	Abbreviation for *Business Process Execution Language*, a standard web services orchestration language, which enables you to assemble discrete services into an end-to-end process flow.
BPEL PM	Abbreviation for *Business Process Execution Language Process Manager*, a comprehensive infrastructure for creating, deploying, and managing BPEL business processes.
Build Configuration File	Configurable settings in a text file that are used by a build program to generate ANT scripts. ANT is a software tool used for automating build processes. These scripts build published business services.
build engineer	An actor that is responsible for building, mastering, and packaging artifacts. Some build engineers are responsible for building application artifacts, and some are responsible for building foundation artifacts.
Build Program	A WIN32 executable that reads build configuration files and generates an ANT script for building published business services.
business analyst	An actor that determines if and why an EnterpriseOne business service needs to be developed.
business function	A named set of user-created, reusable business rules and logs that can be called through event rules. Business functions can run a transaction or a subset of a transaction (check inventory, issue work orders, and so on). Business functions also contain the application programming interfaces (APIs) that enable them to be called from a form, a database trigger, or a non-JD Edwards EnterpriseOne application. Business functions can be combined with other business functions, forms, event rules, and other components to make up an application. Business functions can be created through event rules or third-generation languages, such as C. Examples of business functions include Credit Check and Item Availability.
business function event rule	See named event rule (NER).
business service	EnterpriseOne business logic written in Java. A business service is a collection of one or more artifacts. Unless specified otherwise, a business service implies both a published business service and business service.
business service artifacts	Source files, descriptors, and so on that are managed for business service development and are needed for the business service build process.
business service class method	A method that accesses resources provided by the business service framework.
business service configuration files	Configuration files include, but are not limited to, interop.ini, JDBj.ini, and jdelog.properties.
business service cross reference	A key and value data pair used during orchestration. Collectively refers to both the code and the key cross reference in the WSG/XPI based system.
business service cross-reference utilities	Utility services installed in a BPEL/ESB environment that are used to access JD Edwards EnterpriseOne orchestration cross-reference data.
business service development environment	A framework needed by an integration developer to develop and manage business services.
business services development tool	Otherwise known as JDeveloper.
business service EnterpriseOne object	A collection of artifacts managed by EnterpriseOne LCM tools. Named and represented within EnterpriseOne LCM similarly to other EnterpriseOne objects like tables, views, forms, and so on.

business service framework	Parts of the business service foundation that are specifically for supporting business service development.
business service payload	An object that is passed between an enterprise server and a business services server. The business service payload contains the input to the business service when passed to the business services server. The business service payload contains the results from the business service when passed to the Enterprise Server. In the case of notifications, the return business service payload contains the acknowledgement.
business service property	Key value data pairs used to control the behavior or functionality of business services.
Business Service Property Admin Tool	An EnterpriseOne application for developers and administrators to manage business service property records.
business service property business service group	A classification for business service property at the business service level. This is generally a business service name. A business service level contains one or more business service property groups. Each business service property group may contain zero or more business service property records.
business service property categorization	A way to categorize business service properties. These properties are categorized by business service.
business service property key	A unique name that identifies the business service property globally in the system.
business service property utilities	A utility API used in business service development to access EnterpriseOne business service property data.
business service property value	A value for a business service property.
business service repository	A source management system, for example ClearCase, where business service artifacts and build files are stored. Or, a physical directory in network.
business services server	The physical machine where the business services are located. Business services are run on an application server instance.
business services source file or business service class	One type of business service artifact. A text file with the .java file type written to be compiled by a Java compiler.
business service value object template	The structural representation of a business service value object used in a C-business function.
Business Service Value Object Template Utility	A utility used to create a business service value object template from a business service value object.
business services server artifact	The object to be deployed to the business services server.
business view	A means for selecting specific columns from one or more JD Edwards EnterpriseOne application tables whose data is used in an application or report. A business view does not select specific rows, nor does it contain any actual data. It is strictly a view through which you can manipulate data.
central objects merge	A process that blends a customer's modifications to the objects in a current release with objects in a new release.
central server	A server that has been designated to contain the originally installed version of the software (central objects) for deployment to client computers. In a typical JD Edwards EnterpriseOne installation, the software is loaded on to one machine—the central server. Then, copies of the software are pushed out or downloaded to various workstations attached to it. That way, if the software is altered or corrupted through its use on workstations, an original set of objects (central objects) is always available on the central server.

charts	Tables of information in JD Edwards EnterpriseOne that appear on forms in the software.
check-in repository	A repository for developers to check in and check out business service artifacts. There are multiple check-in repositories. Each can be used for a different purpose (for example, development, production, testing, and so on).
connector	Component-based interoperability model that enables third-party applications and JD Edwards EnterpriseOne to share logic and data. The JD Edwards EnterpriseOne connector architecture includes Java and COM connectors.
contra/clearing account	A general ledger account in JD Edwards EnterpriseOne Financial Management that is used by the system to offset (balance) journal entries. For example, you can use a contra/clearing account to balance the entries created by allocations in JD Edwards EnterpriseOne Financial Management.
Control Table Workbench	An application that, during the Installation Workbench processing, runs the batch applications for the planned merges that update the data dictionary, user-defined codes, menus, and user override tables.
control tables merge	A process that blends a customer's modifications to the control tables with the data that accompanies a new release.
correlation data	The data used to tie HTTP responses with requests that consist of business service name and method.
cost assignment	The process in JD Edwards EnterpriseOne Advanced Cost Accounting of tracing or allocating resources to activities or cost objects.
cost component	In JD Edwards EnterpriseOne Manufacturing, an element of an item's cost (for example, material, labor, or overhead).
credentials	A valid set of JD Edwards EnterpriseOne username/password/environment/role, EnterpriseOne session, or EnterpriseOne token.
cross-reference utility services	Utility services installed in a BPEL/ESB environment that access EnterpriseOne cross-reference data.
cross segment edit	A logic statement that establishes the relationship between configured item segments. Cross segment edits are used to prevent ordering of configurations that cannot be produced.
currency restatement	The process of converting amounts from one currency into another currency, generally for reporting purposes. You can use the currency restatement process, for example, when many currencies must be restated into a single currency for consolidated reporting.
cXML	A protocol used to facilitate communication between business documents and procurement applications, and between e-commerce hubs and suppliers.
database credentials	A valid database username/password.
database server	A server in a local area network that maintains a database and performs searches for client computers.
Data Source Workbench	An application that, during the Installation Workbench process, copies all data sources that are defined in the installation plan from the Data Source Master and Table and Data Source Sizing tables in the Planner data source to the system-release number data source. It also updates the Data Source Plan detail record to reflect completion.
date pattern	A calendar that represents the beginning date for the fiscal year and the ending date for each period in that year in standard and 52-period accounting.

denominated-in currency	The company currency in which financial reports are based.
deployment artifacts	Artifacts that are needed for the deployment process, such as servers, ports, and such.
deployment server	A server that is used to install, maintain, and distribute software to one or more enterprise servers and client workstations.
detail information	Information that relates to individual lines in JD Edwards EnterpriseOne transactions (for example, voucher pay items and sales order detail lines).
direct connect	A transaction method in which a client application communicates interactively and directly with a server application. See also batch-of-one immediate and store-and-forward.
Do Not Translate (DNT)	A type of data source that must exist on the iSeries because of BLOB restrictions.
dual pricing	The process of providing prices for goods and services in two currencies.
duplicate published business services authorization records	Two published business services authorization records with the same user identification information and published business services identification information.
embedded application server instance	An OC4J instance started by and running wholly within JDeveloper.
edit code	A code that indicates how a specific value for a report or a form should appear or be formatted. The default edit codes that pertain to reporting require particular attention because they account for a substantial amount of information.
edit mode	A condition of a form that enables users to change data.
edit rule	A method used for formatting and validating user entries against a predefined rule or set of rules.
Electronic Data Interchange (EDI)	An interoperability model that enables paperless computer-to-computer exchange of business transactions between JD Edwards EnterpriseOne and third-party systems. Companies that use EDI must have translator software to convert data from the EDI standard format to the formats of their computer systems.
embedded event rule	An event rule that is specific to a particular table or application. Examples include form-to-form calls, hiding a field based on a processing option value, and calling a business function. Contrast with the business function event rule.
Employee Work Center	A central location for sending and receiving all JD Edwards EnterpriseOne messages (system and user generated), regardless of the originating application or user. Each user has a mailbox that contains workflow and other messages, including Active Messages.
enterprise server	A server that contains the database and the logic for JD Edwards EnterpriseOne.
Enterprise Service Bus (ESB)	Middleware infrastructure products or technologies based on web services standards that enable a service-oriented architecture using an event-driven and XML-based messaging framework (the bus).
EnterpriseOne administrator	An actor responsible for the EnterpriseOne administration system.
EnterpriseOne credentials	A user ID, password, environment, and role used to validate a user of EnterpriseOne.
EnterpriseOne object	A reusable piece of code that is used to build applications. Object types include tables, forms, business functions, data dictionary items, batch processes, business views, event rules, versions, data structures, and media objects.

EnterpriseOne development client	Historically called "fat client," a collection of installed EnterpriseOne components required to develop EnterpriseOne artifacts, including the Microsoft Windows client and design tools.
EnterpriseOne extension	A JDeveloper component (plug-in) specific to EnterpriseOne. A JDeveloper wizard is a specific example of an extension.
EnterpriseOne process	A software process that enables JD Edwards EnterpriseOne clients and servers to handle processing requests and run transactions. A client runs one process, and servers can have multiple instances of a process. JD Edwards EnterpriseOne processes can also be dedicated to specific tasks (for example, workflow messages and data replication) to ensure that critical processes don't have to wait if the server is particularly busy.
EnterpriseOne resource	Any EnterpriseOne table, metadata, business function, dictionary information, or other information restricted to authorized users.
Environment Workbench	An application that, during the Installation Workbench process, copies the environment information and Object Configuration Manager tables for each environment from the Planner data source to the system-release number data source. It also updates the Environment Plan detail record to reflect completion.
escalation monitor	A batch process that monitors pending requests or activities and restarts or forwards them to the next step or user after they have been inactive for a specified amount of time.
event rule	A logic statement that instructs the system to perform one or more operations based on an activity that can occur in a specific application, such as entering a form or exiting a field.
explicit transaction	Transaction used by a business service developer to explicitly control the type (auto or manual) and the scope of transaction boundaries within a business service.
exposed method or value object	Published business service source files or parts of published business service source files that are part of the published interface. These are part of the contract with the customer.
facility	An entity within a business for which you want to track costs. For example, a facility might be a warehouse location, job, project, work center, or branch/plant. A facility is sometimes referred to as a "business unit."
fast path	A command prompt that enables the user to move quickly among menus and applications by using specific commands.
file server	A server that stores files to be accessed by other computers on the network. Unlike a disk server, which appears to the user as a remote disk drive, a file server is a sophisticated device that not only stores files, but also manages them and maintains order as network users request files and make changes to these files.
final mode	The report processing mode of a processing mode of a program that updates or creates data records.
foundation	A framework that must be accessible for execution of business services at runtime. This includes, but is not limited to, the Java Connector and JDBj.
FTP server	A server that responds to requests for files via file transfer protocol.
header information	Information at the beginning of a table or form. Header information is used to identify or provide control information for the group of records that follows.
HTTP Adapter	A generic set of services that are used to do the basic HTTP operations, such as GET, POST, PUT, DELETE, TRACE, HEAD, and OPTIONS with the provided URL.

instantiate	A Java term meaning "to create." When a class is instantiated, a new instance is created.
integration developer	The user of the system who develops, runs, and debugs the EnterpriseOne business services. The integration developer uses the EnterpriseOne business services to develop these components.
integration point (IP)	The business logic in previous implementations of EnterpriseOne that exposes a document level interface. This type of logic used to be called XBPs. In EnterpriseOne 8.11, IPs are implemented in Web Services Gateway powered by webMethods.
integration server	A server that facilitates interaction between diverse operating systems and applications across internal and external networked computer systems.
integrity test	A process used to supplement a company's internal balancing procedures by locating and reporting balancing problems and data inconsistencies.
interface table	See Z table.
internal method or value object	Business service source files or parts of business service source files that are not part of the published interface. These could be private or protected methods. These could be value objects not used in published methods.
interoperability model	A method for third-party systems to connect to or access JD Edwards EnterpriseOne.
in-your-face-error	In JD Edwards EnterpriseOne, a form-level property which, when enabled, causes the text of application errors to appear on the form.
IServer service	This internet server service resides on the web server and is used to speed up delivery of the Java class files from the database to the client.
jargon	An alternative data dictionary item description that JD Edwards EnterpriseOne appears based on the product code of the current object.
Java application server	A component-based server that resides in the middle-tier of a server-centric architecture. This server provides middleware services for security and state maintenance, along with data access and persistence.
JDBNET	A database driver that enables heterogeneous servers to access each other's data.
JDEBASE Database Middleware	A JD Edwards EnterpriseOne proprietary database middleware package that provides platform-independent APIs, along with client-to-server access.
JDECallObject	An API used by business functions to invoke other business functions.
jde.ini	A JD Edwards EnterpriseOne file (or member for iSeries) that provides the runtime settings required for JD Edwards EnterpriseOne initialization. Specific versions of the file or member must reside on every machine running JD Edwards EnterpriseOne. This includes workstations and servers.
JDEIPC	Communications programming tools used by server code to regulate access to the same data in multiprocess environments, communicate and coordinate between processes, and create new processes.
jde.log	The main diagnostic log file of JD Edwards EnterpriseOne. This file is always located in the root directory on the primary drive and contains status and error messages from the startup and operation of JD Edwards EnterpriseOne.
JDENET	A JD Edwards EnterpriseOne proprietary communications middleware package. This package is a peer-to-peer, message-based, socket-based, multiprocess communications middleware solution. It handles client-to-server and server-to-server communications for all JD Edwards EnterpriseOne supported platforms.
JDeveloper Project	An artifact that JDeveloper uses to categorize and compile source files.

JDeveloper Workspace	An artifact that JDeveloper uses to organize project files. It contains one or more project files.
JMS Queue	A Java Messaging service queue used for point-to-point messaging.
listener service	A listener that listens for XML messages over HTTP.
local repository	A developer's local development environment that is used to store business service artifacts.
local standalone BPEL/ESB server	A standalone BPEL/ESB server that is not installed within an application server.
Location Workbench	An application that, during the Installation Workbench process, copies all locations that are defined in the installation plan from the Location Master table in the Planner data source to the system data source.
logic server	A server in a distributed network that provides the business logic for an application program. In a typical configuration, pristine objects are replicated on to the logic server from the central server. The logic server, in conjunction with workstations, actually performs the processing required when JD Edwards EnterpriseOne software runs.
MailMerge Workbench	An application that merges Microsoft Word 6.0 (or higher) word-processing documents with JD Edwards EnterpriseOne records to automatically print business documents. You can use MailMerge Workbench to print documents, such as form letters about verification of employment.
Manual Commit transaction	A database connection where all database operations delay writing to the database until a call to commit is made.
master business function (MBF)	An interactive master file that serves as a central location for adding, changing, and updating information in a database. Master business functions pass information between data entry forms and the appropriate tables. These master functions provide a common set of functions that contain all of the necessary default and editing rules for related programs. MBFs contain logic that ensures the integrity of adding, updating, and deleting information from databases.
master table	See published table.
matching document	A document associated with an original document to complete or change a transaction. For example, in JD Edwards EnterpriseOne Financial Management, a receipt is the matching document of an invoice, and a payment is the matching document of a voucher.
media storage object	Files that use one of the following naming conventions that are not organized into table format: Gxxx, xxxGT, or GTxxx.
message center	A central location for sending and receiving all JD Edwards EnterpriseOne messages (system and user generated), regardless of the originating application or user.
messaging adapter	An interoperability model that enables third-party systems to connect to JD Edwards EnterpriseOne to exchange information through the use of messaging queues.
messaging server	A server that handles messages that are sent for use by other programs using a messaging API. Messaging servers typically employ a middleware program to perform their functions.
Middle-Tier BPEL/ESB Server	A BPEL/ESB server that is installed within an application server.
Monitoring Application	An EnterpriseOne tool provided for an administrator to get statistical information for various EnterpriseOne servers, reset statistics, and set notifications.

named event rule (NER)	Encapsulated, reusable business logic created using event rules, rather that C programming. NERs are also called business function event rules. NERs can be reused in multiple places by multiple programs. This modularity lends itself to streamlining, reusability of code, and less work.
nota fiscal	In Brazil, a legal document that must accompany all commercial transactions for tax purposes and that must contain information required by tax regulations.
nota fiscal factura	In Brazil, a nota fiscal with invoice information. See also *nota fiscal*.
Object Configuration Manager (OCM)	In JD Edwards EnterpriseOne, the object request broker and control center for the runtime environment. OCM keeps track of the runtime locations for business functions, data, and batch applications. When one of these objects is called, OCM directs access to it using defaults and overrides for a given environment and user.
Object Librarian	A repository of all versions, applications, and business functions reusable in building applications. Object Librarian provides check-out and check-in capabilities for developers, and it controls the creation, modification, and use of JD Edwards EnterpriseOne objects. Object Librarian supports multiple environments (such as production and development) and enables objects to be easily moved from one environment to another.
Object Librarian merge	A process that blends any modifications to the Object Librarian in a previous release into the Object Librarian in a new release.
Open Data Access (ODA)	An interoperability model that enables you to use SQL statements to extract JD Edwards EnterpriseOne data for summarization and report generation.
Output Stream Access (OSA)	An interoperability model that enables you to set up an interface for JD Edwards EnterpriseOne to pass data to another software package, such as Microsoft Excel, for processing.
package	JD Edwards EnterpriseOne objects are installed to workstations in packages from the deployment server. A package can be compared to a bill of material or kit that indicates the necessary objects for that workstation and where on the deployment server the installation program can find them. It is point-in-time snapshot of the central objects on the deployment server.
package build	A software application that facilitates the deployment of software changes and new applications to existing users. Additionally, in JD Edwards EnterpriseOne, a package build can be a compiled version of the software. When you upgrade your version of the ERP software, for example, you are said to take a package build. Consider the following context: "Also, do not transfer business functions into the production path code until you are ready to deploy, because a global build of business functions done during a package build will automatically include the new functions." The process of creating a package build is often referred to, as it is in this example, simply as "a package build."
package location	The directory structure location for the package and its set of replicated objects. This is usually \\deployment server\release\path_code\package\package name. The subdirectories under this path are where the replicated objects for the package are placed. This is also referred to as where the package is built or stored.
Package Workbench	An application that, during the Installation Workbench process, transfers the package information tables from the Planner data source to the system-release number data source. It also updates the Package Plan detail record to reflect completion.
Pathcode Directory	The specific portion of the file system on the EnterpriseOne development client where EnterpriseOne development artifacts are stored.

patterns	General repeatable solutions to a commonly occurring problem in software design. For business service development, the focus is on the object relationships and interactions. For orchestrations, the focus is on the integration patterns (for example, synchronous and asynchronous request/response, publish, notify, and receive/reply).
planning family	A means of grouping end items whose similarity of design and manufacture facilitates being planned in aggregate.
preference profile	The ability to define default values for specified fields for a user-defined hierarchy of items, item groups, customers, and customer groups.
print server	The interface between a printer and a network that enables network clients to connect to the printer and send their print jobs to it. A print server can be a computer, separate hardware device, or even hardware that resides inside of the printer itself.
pristine environment	A JD Edwards EnterpriseOne environment used to test unaltered objects with JD Edwards EnterpriseOne demonstration data or for training classes. You must have this environment so that you can compare pristine objects that you modify.
processing option	A data structure that enables users to supply parameters that regulate the running of a batch program or report. For example, you can use processing options to specify default values for certain fields, to determine how information appears or is printed, to specify date ranges, to supply runtime values that regulate program execution, and so on.
production environment	A JD Edwards EnterpriseOne environment in which users operate EnterpriseOne software.
production-grade file server	A file server that has been quality assurance tested and commercialized and that is usually provided in conjunction with user support services.
Production Published Business Services Web Service	Published business services web service deployed to a production application server.
program temporary fix (PTF)	A representation of changes to JD Edwards EnterpriseOne software that your organization receives on magnetic tapes or disks.
project	In JD Edwards EnterpriseOne, a virtual container for objects being developed in Object Management Workbench.
promotion path	The designated path for advancing objects or projects in a workflow. The following is the normal promotion cycle (path): 11>21>26>28>38>01 In this path, *11* equals new project pending review, *21* equals programming, *26* equals QA test/review, *28* equals QA test/review complete, *38* equals in production, *01* equals complete. During the normal project promotion cycle, developers check objects out of and into the development path code and then promote them to the prototype path code. The objects are then moved to the productions path code before declaring them complete.
proxy server	A server that acts as a barrier between a workstation and the internet so that the enterprise can ensure security, administrative control, and caching service.
published business service	EnterpriseOne service level logic and interface. A classification of a published business service indicating the intention to be exposed to external (non-EnterpriseOne) systems.
published business service identification information	Information about a published business service used to determine relevant authorization records. Published business services + method name, published business services, or *ALL.

published business service web service	Published business services components packaged as J2EE Web Service (namely, a J2EE EAR file that contains business service classes, business service foundation, configuration files, and web service artifacts).
published table	Also called a master table, this is the central copy to be replicated to other machines. Residing on the publisher machine, the F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.
publisher	The server that is responsible for the published table. The F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.
pull replication	One of the JD Edwards EnterpriseOne methods for replicating data to individual workstations. Such machines are set up as pull subscribers using JD Edwards EnterpriseOne data replication tools. The only time that pull subscribers are notified of changes, updates, and deletions is when they request such information. The request is in the form of a message that is sent, usually at startup, from the pull subscriber to the server machine that stores the F98DRPCN table.
QBE	An abbreviation for *query by example*. In JD Edwards EnterpriseOne, the QBE line is the top line on a detail area that is used for filtering data.
real-time event	A message triggered from EnterpriseOne application logic that is intended for external systems to consume.
refresh	A function used to modify JD Edwards EnterpriseOne software, or subset of it, such as a table or business data, so that it functions at a new release or cumulative update level, such as B73.2 or B73.2.1.
replication server	A server that is responsible for replicating central objects to client machines.
Rt-Addressing	Unique data identifying a browser session that initiates the business services call request host/port user session.
rules	Mandatory guidelines that are not enforced by tooling, but must be followed in order to accomplish the desired results and to meet specified standards.
quote order	In JD Edwards Procurement and Subcontract Management, a request from a supplier for item and price information from which you can create a purchase order.
	In JD Edwards Sales Order Management, item and price information for a customer who has not yet committed to a sales order.
secure by default	A security model that assumes that a user does not have permission to execute an object unless there is a specific record indicating such permissions.
Secure Socket Layer (SSL)	A security protocol that provides communication privacy. SSL enables client and server applications to communicate in a way that is designed to prevent eavesdropping, tampering, and message forgery.
SEI implementation	A Java class that implements the methods that declare in a Service Endpoint Interface (SEI).
selection	Found on JD Edwards EnterpriseOne menus, a selection represents functions that you can access from a menu. To make a selection, type the associated number in the Selection field and press Enter.
serialize	The process of converting an object or data into a format for storage or transmission across a network connection link with the ability to reconstruct the original data or objects when needed.
Server Workbench	An application that, during the Installation Workbench process, copies the server configuration files from the Planner data source to the system-release number

	data source. The application also updates the Server Plan detail record to reflect completion.
Service Endpoint Interface (SEI)	A Java interface that declares the methods that a client can invoke on the service.
SOA	Abbreviation for *Service Oriented Architecture*.
softcoding	A coding technique that enables an administrator to manipulate site-specific variables that affect the execution of a given process.
source repository	A repository for HTTP adapter and listener service development environment artifacts.
spot rate	An exchange rate entered at the transaction level. This rate overrides the exchange rate that is set up between two currencies.
Specification merge	A merge that comprises three merges: Object Librarian merge, Versions List merge, and Central Objects merge. The merges blend customer modifications with data that accompanies a new release.
specification	A complete description of a JD Edwards EnterpriseOne object. Each object has its own specification, or name, which is used to build applications.
Specification Table Merge Workbench	An application that, during the Installation Workbench process, runs the batch applications that update the specification tables.
SSL Certificate	A special message signed by a certificate authority that contains the name of a user and that user's public key in such a way that anyone can "verify" that the message was signed by no one other than the certification authority and thereby develop trust in the user's public key.
store-and-forward	The mode of processing that enables users who are disconnected from a server to enter transactions and then later connect to the server to upload those transactions.
subscriber table	Table F98DRSUB, which is stored on the publisher server with the F98DRPUB table and identifies all of the subscriber machines for each published table.
superclass	An inheritance concept of the Java language where a class is an instance of something, but is also more specific. "Tree" might be the superclass of "Oak" and "Elm," for example.
supplemental data	Any type of information that is not maintained in a master file. Supplemental data is usually additional information about employees, applicants, requisitions, and jobs (such as an employee's job skills, degrees, or foreign languages spoken). You can track virtually any type of information that your organization needs.
	For example, in addition to the data in the standard master tables (the Address Book Master, Customer Master, and Supplier Master tables), you can maintain other kinds of data in separate, generic databases. These generic databases enable a standard approach to entering and maintaining supplemental data across JD Edwards EnterpriseOne systems.
table access management (TAM)	The JD Edwards EnterpriseOne component that handles the storage and retrieval of use-defined data. TAM stores information, such as data dictionary definitions; application and report specifications; event rules; table definitions; business function input parameters and library information; and data structure definitions for running applications, reports, and business functions.
Table Conversion Workbench	An interoperability model that enables the exchange of information between JD Edwards EnterpriseOne and third-party systems using non-JD Edwards EnterpriseOne tables.

table conversion	An interoperability model that enables the exchange of information between JD Edwards EnterpriseOne and third-party systems using non-JD Edwards EnterpriseOne tables.
table event rules	Logic that is attached to database triggers that runs whenever the action specified by the trigger occurs against the table. Although JD Edwards EnterpriseOne enables event rules to be attached to application events, this functionality is application specific. Table event rules provide embedded logic at the table level.
terminal server	A server that enables terminals, microcomputers, and other devices to connect to a network or host computer or to devices attached to that particular computer.
three-tier processing	The task of entering, reviewing and approving, and posting batches of transactions in JD Edwards EnterpriseOne.
three-way voucher match	In JD Edwards Procurement and Subcontract Management, the process of comparing receipt information to supplier's invoices to create vouchers. In a three-way match, you use the receipt records to create vouchers.
transaction processing (TP) monitor	A monitor that controls data transfer between local and remote terminals and the applications that originated them. TP monitors also protect data integrity in the distributed environment and may include programs that validate data and format terminal screens.
transaction processing method	A method related to the management of a manual commit transaction boundary (for example, start, commit, rollback, and cancel).
transaction set	An electronic business transaction (electronic data interchange standard document) made up of segments.
trigger	One of several events specific to data dictionary items. You can attach logic to a data dictionary item that the system processes automatically when the event occurs.
triggering event	A specific workflow event that requires special action or has defined consequences or resulting actions.
two-way authentication	An authentication mechanism in which both client and server authenticate themselves by providing the SSL certificates to each other.
two-way voucher match	In JD Edwards Procurement and Subcontract Management, the process of comparing purchase order detail lines to the suppliers' invoices to create vouchers. You do not record receipt information.
user identification information	User ID, role, or *public.
User Overrides merge	Adds new user override records into a customer's user override table.
value object	A specific type of source file that holds input or output data, much like a data structure passes data. Value objects can be exposed (used in a published business service) or internal, and input or output. They are comprised of simple and complex elements and accessories to those elements.
variance	In JD Edwards Capital Asset Management, the difference between revenue generated by a piece of equipment and costs incurred by the equipment.
	In JD Edwards EnterpriseOne Project Costing and JD Edwards EnterpriseOne Manufacturing, the difference between two methods of costing the same item (for example, the difference between the frozen standard cost and the current cost is an engineering variance). Frozen standard costs come from the Cost Components table, and the current costs are calculated using the current bill of material, routing, and overhead rates.

versioning a published business service	Adding additional functionality/interfaces to the published business services without modifying the existing functionality/interfaces.
Version List merge	The Versions List merge preserves any non-XJDE and non-ZJDE version specifications for objects that are valid in the new release, as well as their processing options data.
visual assist	Forms that can be invoked from a control via a trigger to assist the user in determining what data belongs in the control.
vocabulary override	An alternate description for a data dictionary item that appears on a specific JD Edwards EnterpriseOne form or report.
wchar_t	An internal type of a wide character. It is used for writing portable programs for international markets.
web application server	A web server that enables web applications to exchange data with the back-end systems and databases used in eBusiness transactions.
web server	A server that sends information as requested by a browser, using the TCP/IP set of protocols. A web server can do more than just coordination of requests from browsers; it can do anything a normal server can do, such as house applications or data. Any computer can be turned into a web server by installing server software and connecting the machine to the internet.
Web Service Description Language (WSDL)	An XML format for describing network services.
Web Service Inspection Language (WSIL)	An XML format for assisting in the inspection of a site for available services and a set of rules for how inspection-related information should be made.
web service proxy foundation	Foundation classes for web service proxy that must be included in a business service server artifact for web service consumption on WAS.
web service softcoding record	An XML document that contains values that are used to configure a web service proxy. This document identifies the endpoint and conditionally includes security information.
web service softcoding template	An XML document that provides the structure for a soft coded record.
Where clause	The portion of a database operation that specifies which records the database operation will affect.
Windows terminal server	A multiuser server that enables terminals and minimally configured computers to display Windows applications even if they are not capable of running Windows software themselves. All client processing is performed centrally at the Windows terminal server and only display, keystroke, and mouse commands are transmitted over the network to the client terminal device.
wizard	A type of JDeveloper extension used to walk the user through a series of steps.
workbench	A program that enables users to access a group of related programs from a single entry point. Typically, the programs that you access from a workbench are used to complete a large business process. For example, you use the JD Edwards EnterpriseOne Payroll Cycle Workbench (P07210) to access all of the programs that the system uses to process payroll, print payments, create payroll reports, create journal entries, and update payroll history. Examples of JD Edwards EnterpriseOne workbenches include Service Management Workbench (P90CD020), Line Scheduling Workbench (P3153), Planning Workbench (P13700), Auditor's Workbench (P09E115), and Payroll Cycle Workbench.
work day calendar	In JD Edwards EnterpriseOne Manufacturing, a calendar that is used in planning functions that consecutively lists only working days so that component and work order scheduling can be done based on the actual number of work days available. A work

day calendar is sometimes referred to as planning calendar, manufacturing calendar, or shop floor calendar.

workflow
The automation of a business process, in whole or in part, during which documents, information, or tasks are passed from one participant to another for action, according to a set of procedural rules.

workgroup server
A server that usually contains subsets of data replicated from a master network server. A workgroup server does not perform application or batch processing.

XAPI events
A service that uses system calls to capture JD Edwards EnterpriseOne transactions as they occur and then calls third-party software, end users, and other JD Edwards EnterpriseOne systems that have requested notification when the specified transactions occur to return a response.

XML CallObject
An interoperability capability that enables you to call business functions.

XML Dispatch
An interoperability capability that provides a single point of entry for all XML documents coming into JD Edwards EnterpriseOne for responses.

XML List
An interoperability capability that enables you to request and receive JD Edwards EnterpriseOne database information in chunks.

XML Service
An interoperability capability that enables you to request events from one JD Edwards EnterpriseOne system and receive a response from another JD Edwards EnterpriseOne system.

XML Transaction
An interoperability capability that enables you to use a predefined transaction type to send information to or request information from JD Edwards EnterpriseOne. XML transaction uses interface table functionality.

XML Transaction Service (XTS)
Transforms an XML document that is not in the JD Edwards EnterpriseOne format into an XML document that can be processed by JD Edwards EnterpriseOne. XTS then transforms the response back to the request originator XML format.

Z event
A service that uses interface table functionality to capture JD Edwards EnterpriseOne transactions and provide notification to third-party software, end users, and other JD Edwards EnterpriseOne systems that have requested to be notified when certain transactions occur.

Z table
A working table where non-JD Edwards EnterpriseOne information can be stored and then processed into JD Edwards EnterpriseOne. Z tables also can be used to retrieve JD Edwards EnterpriseOne data. Z tables are also known as interface tables.

Z transaction
Third-party data that is properly formatted in interface tables for updating to the JD Edwards EnterpriseOne database.

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