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JD EDWARDS WORLD

JD Edwards World
Address Book Guide

Version A9.1

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JD Edwards World
Address Book Guide

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Contents

1 Overview

Overview to Address Book and Electronic Mail 1-1

About Address Book and Electronic Mail 1-1
Address Book Integration 1-1
Address Book Features 1-3
Tables Used by Address Book 1-5
Electronic Mail System Integration 1-7
Electronic Mail Features 1-8
Tables Used by Electronic Mail 1-9
Menu Overview 1-11

2 Address Book Maintenance

Overview to Address Book Maintenance 2-1

About Address Book Maintenance 2-1

Locate Addresses 2-5

Locating Addresses 2-5

Enter Address Book Records 2-9

Entering Address Book Records 2-9

Review Address Book Records for 1099s and W2s 2-27

Reviewing Address Book Records for 1099s and W2s 2-27

3 Auxiliary Address Book Information

Overview to Auxiliary Address Book Information 3-1

Objectives 3-1
About Auxiliary Address Book Information 3-1

Work with Address Revisions 3-3

About Working with Address Revisions 3-3
Procedures 3-3
Duplicate Entry Checking 3-4

Enter Socio-Economic Information 3-9

Overview 3-9
Set-Up.. 3-9
Maintaining Socio-Economic Data 3-10

Enter Related Addresses 3-13

Overview 3-13
Set-Up.. 3-13
Retrieving Related Addresses... 3-13
Technical Considerations 3-14
Entering Related Addresses.. 3-14

Work with Address Book User Reserved Fields 3-17

Set Up 3-17
Entering User Reserved Information 3-18

Work with Address Book Email/URL Selections 3-21

About Working with Address Book Email/URL Selections 3-21
Using Address Book Email/URL Selection 3-21
Entering Address Book Email/URL Revisions 3-22

4 Address Book Reports and Mailing Labels

Overview to Address Book Reports and Mailing Labels.................... 4-1

About Address Book Reports and Mailing Labels 4-1

Print Reports by Address and Who’s Who.. 4-3

Printing Reports by Address and Who’s Who 4-3
Printing Reports by Address 4-4
Printing Reports by Who’s Who... 4-7

Print the Check for Duplicates Report 4-11

Printing the Check for Duplicates Report 4-11

Print an Audit Log 4-13

Printing an Audit Log.. 4-13

Print Mailing Labels 4-17

Printing Mailing Labels 4-17
Printing Address and Who’s Who Labels.. 4-18
Printing Cheshire Labels 4-18
Printing Dun & Bradstreet Labels 4-19

Create the Address Book Reporting Table 4-21

Creating the Address Book Reporting Table 4-21

5 System Setup

Overview to System Setup 5-1

About Address Book System Setup...5-1

Set Up Constants for Address Book.. 5-3

Setting Up Constants for Address Book 5-3

Set Up Country Constants for Address Book 5-7

Setting Up Country Constants for Address Book 5-7

Set Up Postal Codes for Address Book 5-15

Setting Up Postal Codes for Address Book 5-15

Understand User-Defined Codes.. 5-19

About User-Defined Codes 5-19

Understand User-Defined Codes for Address Book 5-21

About User-Defined Codes for Address Book..5-21
Address Book Category Codes (01/01-30)..5-21
Who’s Who Category Codes (01/W1-9, WT)..5-22
Search Type Codes (01/ST)..5-22
Standard Industry Codes (01/SC)...5-22
Flash Message Codes (00/CM)..5-23
Country Codes (00/CN) 5-23
Salutation Codes (01/SL)..5-23
Electronic Mail Message Type Codes (01/MT) 5-24
Language Preference Codes (01/LP) 5-24
Word Search Stop Word Codes (01/SW) 5-24
Dun & Bradstreet Rating Codes (01/DB)..5-25
Trans World Credit Rating Codes (01/TR)...5-25

Work with User-Defined Codes... 5-27

Working with User-Defined Codes...5-27

Set Up Category Codes for Address Book 5-31

About Setting Up Category Codes for Address Book 5-31
Setting Up Address Book Category Codes..5-32
Setting Up Who’s Who Category Codes..5-32

Set Up Next Numbers 5-33
Setting Up Next Numbers 5-33

Set Up Consolidation Codes 5-37
Setting Up Consolidation Codes 5-37

6 Parent/Child Relationships

Overview to Parent/Child Relationships 6-1
About Parent/Child Relationships 6-1

Work with Parent/Child Relationships 6-3
Working with Parent/Child Relationships 6-3
Creating Parent/Child Relationships 6-3
Viewing Parent/Child Relationships 6-6
Printing Parent/Child Relationships 6-8

7 Address Book Supplemental Data

Overview to Address Book Supplemental Data 7-1
About Address Book Supplemental Data 7-1

Define Supplemental Data 7-5
Defining Supplemental Data 7-5
Defining Data Types 7-5
Defining CIF Sequences 7-11
Defining Supplemental Data Security 7-13

Enter and Copy Supplemental Data 7-15
Entering and Copying Supplemental Data 7-15
Entering Detailed Supplemental Information 7-16
Copying Detailed Supplemental Information 7-17
Entering Narrative Text 7-18
Copying Narrative Text 7-19

Change Data Types 7-21
Changing Data Types 7-21
Changing Code and Narrative Data Types 7-22
What You Should Know About 7-23
Changing Program Data Types 7-23
Processing Options 7-23

View Supplemental Data 7-25
Viewing Supplemental Data 7-25
Viewing Data by Address 7-25
Viewing Data by Data Type 7-26

Work with Supplemental Data Reports 7-29
Working with Supplemental Data Reports 7-29
Creating a Worktable 7-29
Printing Supplemental Data Reports 7-30

8 Address Batch Processing

Overview to Address Batch Processing 8-1
About Address Batch Processing 8-1

Review Address Batches 8-3
Reviewing Address Batches 8-3
Reviewing Addresses 8-4
Reviewing Transaction Detail 8-4

Work with Address Batches 8-7
Working with Address Batches 8-7
Adding Address Records to Batches 8-8
Revising Batch Address Records 8-10

Process Address Batches 8-13
Processing Address Batches 8-13

Purge Address Batches 8-15
Purging Address Batches 8-15

9 Updates and Purges

Overview to Updates and Purges 9-1
About Updates and Purges 9-1

Update Credit Messages 9-3
Updating Credit Messages 9-3

Update Category Codes 9-5
Updating Category Codes 9-5

Update Effective Dates 9-7
Updating Effective Dates 9-7

Create and Update the Search Word Table 9-9
Creating and Updating the Search Word Table 9-9
Creating the Search Word Table 9-10
Updating the Search Word Table 9-10

Purge Records 9-13
Purging Records 9-13
Purging Address Book Information and Related Files 9-14
Purging the Audit Log 9-16
Purging the Message Log 9-16
Purging the Time Log 9-16

10 Electronic Mail

Overview to Electronic Mail 10-1
About Electronic Mail 10-1

Work with Employee Mailboxes 10-3
Working with Employee Mailboxes 10-3

Work with Messages 10-9
Working with Messages 10-9

Work with Message Features 10-25
Working with Message Features 10-25

Work with Bulletin Boards 10-29
Working with Bulletin Boards 10-29

Assign E-Mail User Defined Codes 10-33
Assigning E-Mail User Defined Codes 10-33

11 Processing Options

Address Book Maintenance Processing Options 11-1
Address Book Revisions (P01051) 11-1

Address Book Reports and Mailing Labels Processing Options 11-3
Reports by Address (P01301) 11-3

One Line per Address – Who's Who (P01402W) 11-4
Check Duplicates – Name, Postal Code, Phone (P014052).......................................11-5
Print Audit Log (P01430) 11-5
Mailing Labels Print – Who's Who (P01401W) 11-6
Cheshire Labels (P01401C) 11-6
Cheshire Labels - Dun / Bradstreet (P01401C1)..11-6
Build Address Book Reporting File (P01901)..11-7

System Setup Processing Options 11-9

General User-Defined Codes (P00051)...11-9

Parent/Child Relationships Processing Options 11-11

Address Book Organization Structure Revisions (P0150).....................................11-11
Structure Print (P01425) 11-11

Address Book Supplemental Data Processing Options 11-13

Define Type of Data - CORE (P01090) 11-13
Supplemental Data Work File Build (P01460)..11-13
Address by Data Type (P01440)..11-14
Supplemental Data (P01450) 11-14

Address Batch Processing – Processing Options 11-15

Address Book Batch Maintenance (P0101Z1) 11-15
Address Book Batch File Processing (P01110Z)..11-15
Batch File Purge (P00PURGE)..11-17

Updates and Purges Processing Options 11-19

Global Address Book Update (P01490)..11-19
Address Book Purge (P01800)..11-20

Electronic Mail Processing Options.. 11-23

Message Log (P012501) 11-23

12 Appendices

Appendix A – Batch Input Setup 12-1

Batch Control Information...12-1
Transaction Information 12-2
Technical Considerations...12-2
DREAM Writer Considerations 12-3
Address Book Field Instructions..12-4
Table 1 - Required or Conditionally Required Fields 12-5
Table 2 - Optional Control Fields...12-7

Table 3 - Additional Fields 12-9
Table 4 - Ignored Fields 12-15

1 Overview

Overview to Address Book and Electronic Mail

About Address Book and Electronic Mail

The JD Edwards World Address Book system is an online version of traditional Rolodex card files. It is a central database that shares information across all JD Edwards World systems and, therefore, eliminates redundant data entry and dramatically reduces errors.

Integrated with the Address Book system is the Electronic Mail system. It provides features that promote effective and timely communication throughout your organization, whether you need to send messages within a single site or between domestic and international branch offices.

This section contains the following:

- Address Book Integration
- Address Book Features
- Tables Used by Address Book
- Electronic Mail System Integration
- Electronic Mail Features
- Tables Used by Electronic Mail
- Menu Overview

Address Book Integration

The address book is the foundation for other JD Edwards World software systems. Every JD Edwards World system works with the Address Book system to retrieve up-to-date name and address information. For example, the Accounts Payable system uses address information for supplier payments, while the Accounts Receivable system uses address information for customer invoices and statements.

The following integrate with the address book:

Financials Systems

System	Description
Accounts Payable	Set up suppliers and tax entities.
Accounts Receivable	Set up customers and tax entities.

AEC Systems

System	Description
Job Cost	Set up jobs and assign them to a project manager and superintendent. Job Cost also uses the address book to set up suppliers and subcontractors.
Contract Management	Set up suppliers for progress payments. Contract Management also uses the address book for contract logs.
Contract Billing	Set up architects, customers, owners, remit-to, alternate bill-to, and send-to addresses.
Service Billing	Set up customers (on work orders) and employees.
Work Order Management	Set up customers, managers, originators, and supervisors.
Property Management	Set up tenants, managers, leasing agents, buildings, lease managers, parties-to-bill, payment sources, salespersons, and occupants.
Fixed Assets	Set up employees who are responsible for assets and suppliers who provide assets.
Equipment / Plant Management	Set up employees who are responsible for equipment, suppliers who provide equipment, and employees who are assigned to perform preventative maintenance.

Distribution Systems

System	Description
Purchase Order Management	Set up suppliers, buyers, carriers, branch / plants, ship-to addresses, and landed cost suppliers (duty brokers).
Sales Order Management	Set up ship-to addresses, sold-to addresses, carriers, salespersons, branch / plants, and customer billing instructions.
Inventory Management	Set up planners, buyers, and branches / plants in the item master.

Manufacturing Systems

System	Description
Requirements Planning	Set up branches/plants and planners, such as material planners or employees in charge of a product or line.
Forecasting	Set up hierarchies in forecasting programs.
Advanced Pricing	Set up category codes to categorize customers for special pricing.

Payroll and Human Resources Systems

System	Description
Payroll	Set up employees and the name and address of W2 reporting entities.
Human Resources	Set up participants, beneficiaries, and applicants.

Address Book Features

Information drives every aspect of a business. How you manage and provide information can affect your relationships with customers, suppliers, individuals, and companies. You manage the information about the people and companies with whom you do business using the address book.

The features of the Address Book system include:

- Address book management
- Reporting
- Multi-national functionality

Address Book Management

With a central database that integrates with all JD Edwards World systems, you can maximize your productivity and effectively manage your address book information. For example, you can:

- Maintain complete information and update records on employees, customers, and suppliers
- Notify authorized users about special situations, such as credit warnings, hold messages, or other critical account information, with over 30 possible user defined messages

Reporting

You define how you sort and classify your information. With address book reporting, you can:

- Establish up to 30 user-defined reporting codes for each address book record. For example, sort suppliers by salesperson for one report and by region for another report.
- Identify individuals, such as billing contacts, executives, and sales contacts, who are part of company address book records, with up to 10 custom codes.
- Maintain multiple address within address book for each contact
- Use a common consolidation code to associate multiple address book records to report on group financial data
- Customize your database to fit your needs by creating and organizing user defined information, such as textual and statistical information, and attaching that information to address book records.
- Select and sort address information by postal code, customer type, or other requirements.
- Customize reports to produce mailing lists, labels, and so on.

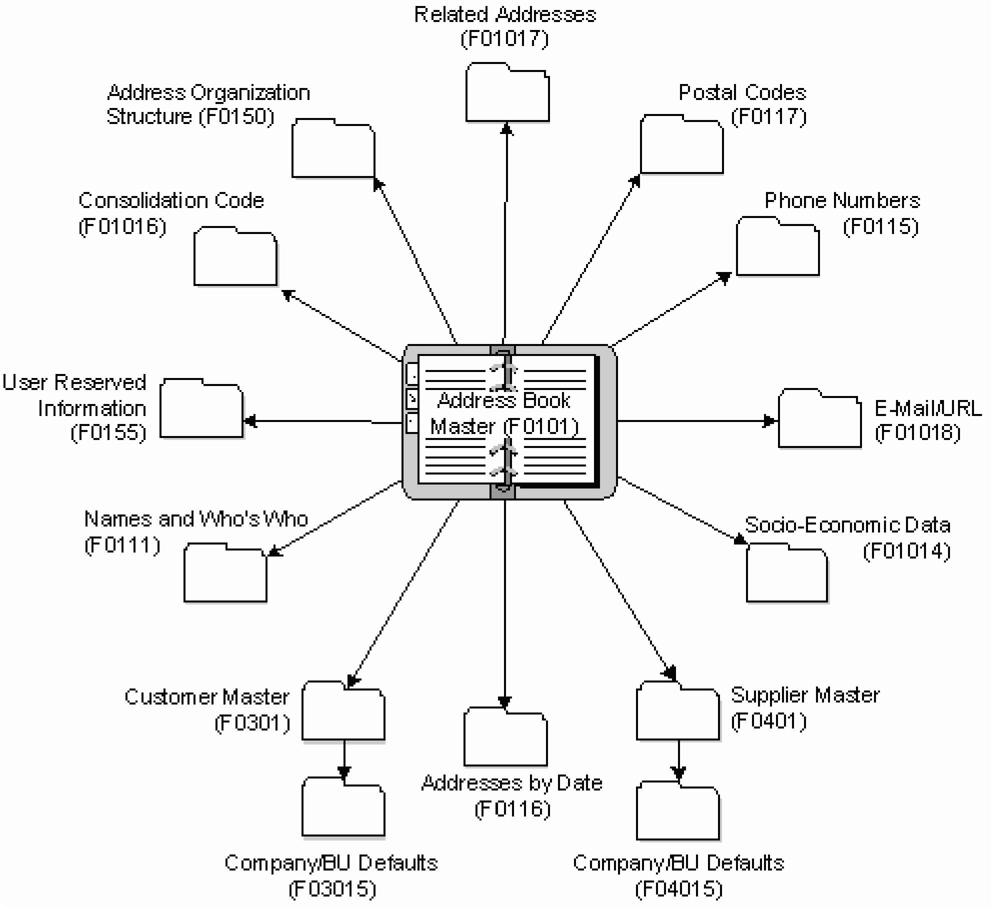
Multi-National Functionality

Multi-national functionality allows you to build a global information network about the people and companies with whom you do business. The multi-national functionality in the Address Book system includes:

Function	Description
Multiple languages	You can communicate with customers and suppliers in their preferred languages to enhance relationships and reduce potential misunderstanding regarding invoices, vouchers, and other correspondence.
International mailing requirements	Each country has different requirements for mailing addresses. The address book provides 16 predefined mailing formats which control the placement of information on mailing labels for specific countries.

Tables Used by Address Book

Tables and Information Flow


Related Addresses (F01017)
Address Organization Structure (F0150)
Postal Codes (F0117)
Consolidation Code (F01016)
Phone Numbers (F0115)
User Reserved Information (F0155)
Address Book Master (F0101)
E-Mail/URL (F01018)
Names and Who's Who (F0111)
Socio-Economic Data (F01014)
Customer Master (F0301)
Supplier Master (F0401)
Addresses by Date (F0116)
Company/BU Defaults (F03015)
Company/BU Defaults (F04015)

Tables and Descriptions

The Address Book system uses the following primary tables:

Table	Description
Address Book Master (F0101)	Stores names, address numbers, search types, and category codes.
Names and Who's Who (F0111)	Stores names, who's who contacts, given names, and surnames.
Contact Phone Numbers (F0115)	Stores contact phone numbers, and types of phones.
E-mail / URL (F01018)	Stores e-mail and URL addresses per address number or contact.
Address by Date (F0116)	Stores addresses, address lines, and effective dates for addresses.

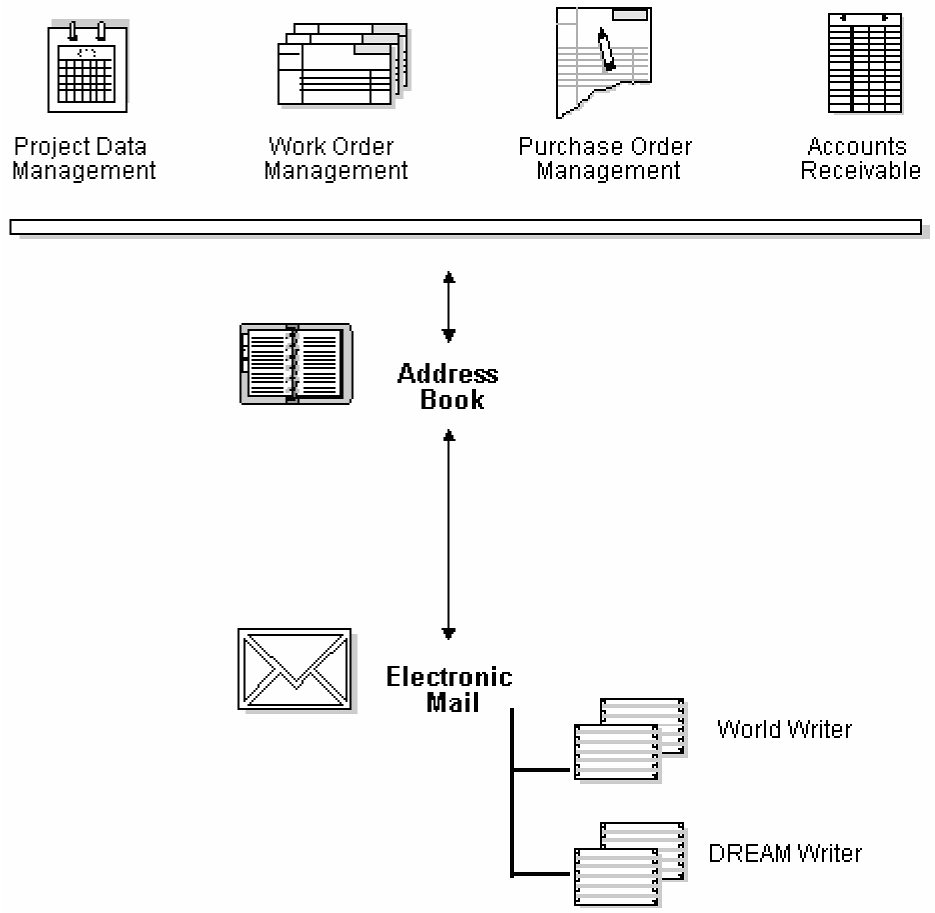
Table	Description
Postal Code Transactions (F0117)	Stores zip codes, postal codes, and the city and state.
Address Organization Structure Master (F0150)	Stores parent numbers, child numbers, address numbers, and structure types.
Related Addresses (F01017)	Stores up to 36 related address for each address number.
Socio-Economic Data (F01014)	Stores socio-economic data as defined and tracked per business or governmental requirements.
Consolidation Code (F01016)	Stores information related to each consolidation code.
Customer Master (F0301)	Stores accounts receivable and billing information about a customer.
Customer Master Company/BU Defaults (F03015)	Stores accounts receivable information for the same customer by company or business unit.
Supplier Master (F0401)	Stores accounts payable information about a supplier.
Supplier Master Company/BU Defaults (F04015)	Stores accounts payable information for the same supplier by company and business unit.

The Address Book system also uses the following tables.

Table	Description
Address Book Master Audit Log (F0101A)	Stores changes, additions, and deletions that are made to address book records.
Address Book Batch Input (F0101Z1)	Holds records that originate from an outside (third party) source until they become JD Edwards World address book records.
Country Constants (F0070)	Stores country-specific address book formats for international mailing labels.
Address Book Repository (F01901)	Stores information from seven Address Book tables and is used for reporting purposes.
Supplemental Database—Financial (F01090), Code (F01092), and Narrative (F01093)	Stores user defined information, such as textual and statistical information.
Address Book Word Search Master (F01800)	Stores words that are referenced when you do a name search.

Electronic Mail System Integration

The following graphic shows the other JD Edwards World systems that integrate with the Electronic Mail system.


Project Data Management
Work Order Management
Purchase Order Management
Accounts Receivable
Address Book
Electronic Mail
World Writer
DREAM Writer

The following integrate with electronic mail:

Financial Systems

System	Description
Address Book	All electronic mailboxes use an address book number to track messages. Every mailbox in the Electronic Mail system must have a corresponding address book record.
Accounts Receivable	Communications with a customer about credit and collections are logged in the customer's mailbox as a "promises, promises" message. Credit and collection managers can view this information online or in report format. The system updates the customer's mailbox when a delinquency notice is sent.

AEC Systems

System	Description
Work Order Management	The Electronic Mail system notifies an approver when a work order needs approval. The approver can directly access the approval form from the Electronic-Mail system. The system also notifies the originator of the requisition when an action has occurred.

Distribution Systems

System	Description
Purchase Order Management	The Electronic Mail system notifies an approver when a purchase order needs approval. The approver can directly access the approval form from the Electronic-Mail system. The system also notifies the originator of the requisition when an action has occurred.

Manufacturing Systems

System	Description
Product Data Management	The Electronic Mail system notifies an approver when an engineering change order needs approval.

Electronic Mail Features

Electronic mail (e-mail) is a vital tool for inter-office and intra-office communication. With e-mail, you can send messages, schedule a conference room, and indicate where you are (for example, at another location or on vacation).

The features of the Electronic Mail system include:

- Electronic mail management
- Workflow management

Electronic Mail Management

With efficient management of your electronic mail, you can:

- Track current addresses and maintain address histories by having the system change address information as of a specific date
- Post global messages or transfer information to a central place where specific groups of people can view them

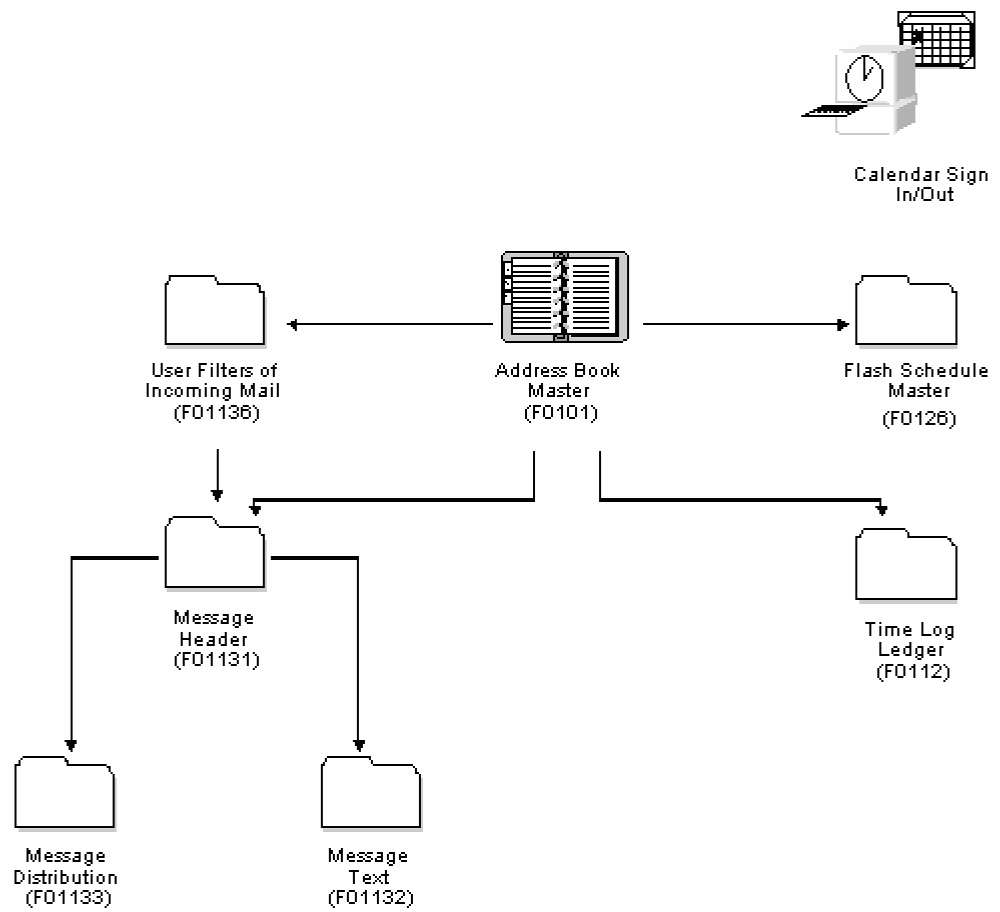
Workflow Management

Workflow management within the Electronic Mail system helps to create an efficient working environment. You can:

- Expedite workflow with messages that are automatically triggered by user action
- Locate users' calendars to check time availability for scheduling meetings
- Sign in and out so others know where to find you
- Forward messages to an unlimited number of recipients and add text with each remittance

Tables Used by Electronic Mail

Tables and Information Flow


Calendar Sign In/Out
User Filters of Incoming Mail (F01136)
Address Book Master (F0101)
Flash Schedule Master (F0126)
Message Header (F01131)
Time Log Ledger (F0112)
Message Distribution (F01133)
Message Text (F01132)

Tables and Descriptions

The Electronic Mail system uses the following primary tables:

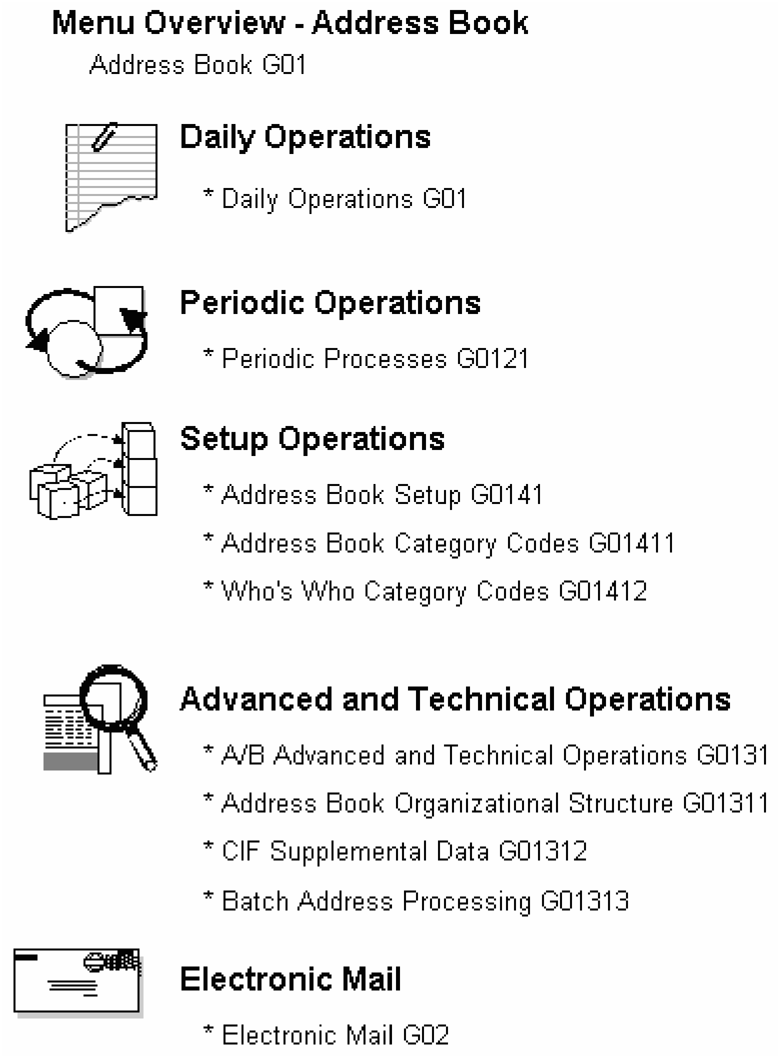
Table	Description
Message Header (F01131)	Stores serial numbers, parent numbers, from addresses, and tickler dates.
Message Text (F01132)	Stores serial numbers, line numbers, and generic text.
Message Distribution (F01133)	Stores serial numbers, address numbers, mailbox designators, tickler dates, and message statuses.
Bulletin Board Enrollment (F01134)	Stores user IDs, address numbers, display sequences, and user classes / groups.
User Filters for Incoming Mail (F01136)	Stores parent numbers, address numbers, and mailbox designators.

The Electronic Mail system also uses the following tables:

Table	Description
Address Book Master (F0101)	Stores names, search types, address numbers, phone numbers, and category codes.
Time Log Ledger (F0112)	Stores time in and time out information.
Flash Schedule Master (F0126)	Stores calendar information.

Menu Overview

The Address Book and Electronic Mail menus are listed below. This list does not show navigation among the menus.



Menu Overview - Address Book

Address Book G01

Daily Operations

* Daily Operations G01

Periodic Operations

* Periodic Processes G0121

Setup Operations

* Address Book Setup G0141

* Address Book Category Codes G01411

* Who's Who Category Codes G01412

Advanced and Technical Operations

* A/B Advanced and Technical Operations G0131

* Address Book Organizational Structure G01311

* CIF Supplemental Data G01312

* Batch Address Processing G01313

Electronic Mail

* Electronic Mail G02

2 Address Book Maintenance

Overview to Address Book Maintenance

Objectives

- To search for addresses in the address book
- To maintain address book information
- To maintain category codes
- To maintain contact names and numbers
- To maintain notes related to addresses
- To maintain addresses by effective date
- To provide security for address information
- To provide an address table that communicates with other JD Edwards World systems

About Address Book Maintenance

You use the address book to maintain information about companies and people with whom you do business. The address book is an online version of traditional Rolodex card files. It contains names, addresses, contact names, phone numbers, notes, and other pertinent information. The address book is the foundation for all other JD Edwards World systems.

Address book maintenance consists of:

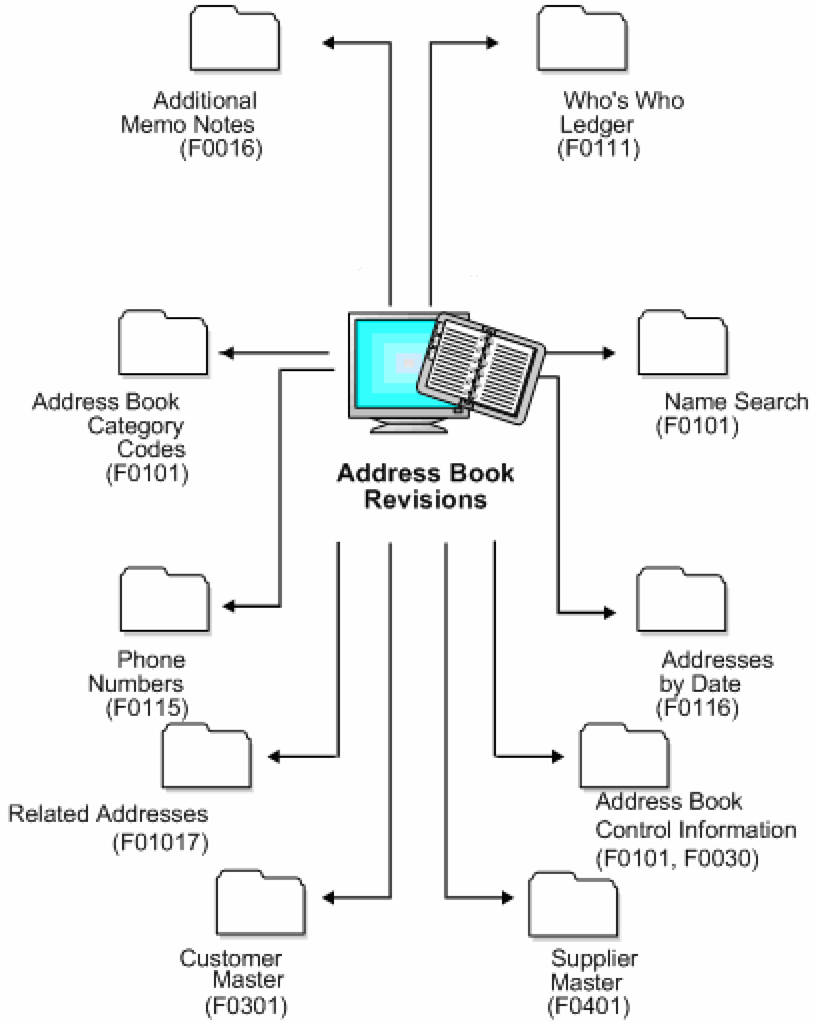
- Locating addresses
- Entering address book records
- Reviewing address book records for 1099s and W2s

You will often use the following programs:

Program	Description
Address Book Revisions	Used to add and maintain basic address information, contacts (who's who), phone numbers, reference addresses, tax information, customer master information, supplier master information, and billing instructions. You can access other forms from Address Book Revisions.

Program	Description
Name Search	Used to find addresses you have added. To find an address, you can enter a full name, partial name, telephone number, parent number, or category code. In addition, you can use the Query Search function to perform an expanded search on information.

The following graphic shows the names of the forms (and corresponding tables) that you can access from Address Book Revisions.


Additional Memo Notes (F0016)
Who's Who Ledger (F0111)
Address Book Category Codes (F0101)
Name Search (F0101)
Address Book Revisions
Phone Numbers (F0115)
Addresses by Date (F0116)
Related Addresses (F01017)
Address Book Control Information (F0101, F0030)
Customer Master (F0301)
Supplier Master (F0401)

Approvals Processing

You can define certain users in the Approval Constants the ability to view or maintain the Add, Change, and Delete functions within Address Book. The approvals management system automatically creates a unique transaction number to track changes throughout the approvals process.

The approval management system integrates with following Address Book revision programs:

- Bank Account Cross-Reference P0030
- Related Address Revisions P01017
- Address Book - Email / URL addresses P01018
- AB - Email / URL Selection P01018S
- Address Book Revisions P01051
- Address Book - Category Codes P010512
- Additional Address Book Information P010513
- Address Book - Socio-Economic Information P010514
- A/R Information P01053
- Accounts Payable Information P01054
- Phone Book Information P01075
- Who's Who Information P0111
- Who's Who Information Window P0111W
- Address Revisions P0116

See Also

- *Technical Foundation Guide* for information on the Approvals Management setup and use.

Locate Addresses

Locating Addresses

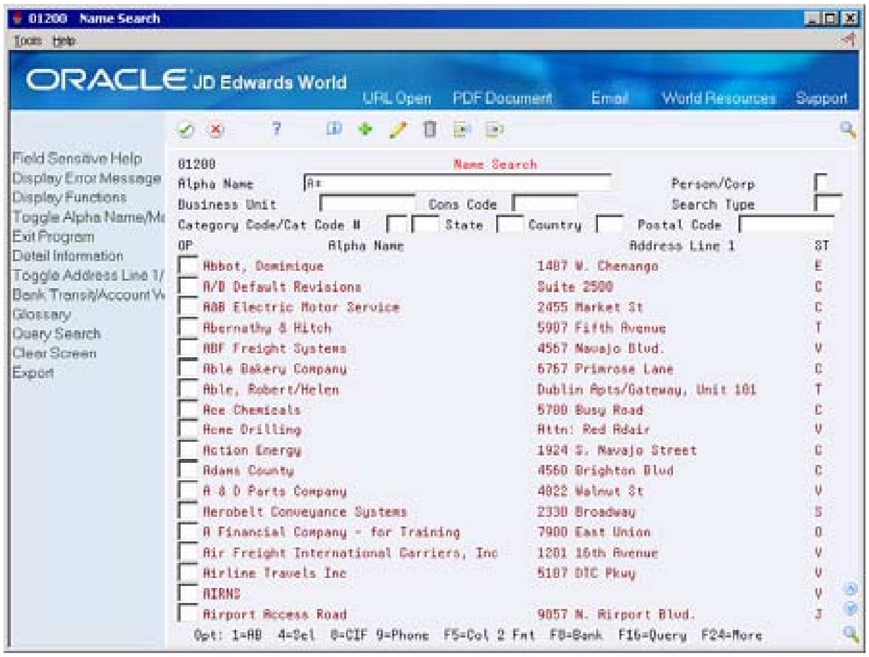
	From Address Book (G01), choose Name Search

From the Address Book menu (G01), choose Name Search.

After you create address book records for your customers, suppliers, employees, and so on, you might want to review or revise them. To do so, you must first locate them.

Locating addresses consists of:

- Locating addresses by alpha name
- Locating addresses using query search



01200 Name Search
Tools
Help
ORACLE JD Edwards World
URL Open
PDF Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Toggle Alpha Name/M
Exit Program
Detail Information
Toggle Address Line 1/
Bank Transit/Account V
Glossary
Query Search
Clear Screen
Export

01200 Name Search

Alpha Name A*

Person/Corp ☐

Business Unit ☐ Cons Code ☐

Search Type ☐

Category Code/Cat Code # ☐ ☐ State ☐ Country ☐ Postal Code ☐

OP	Alpha Name	Address Line 1	ST
☐	Abbot, Dominique	1407 W. Chenango	E
☐	A/B Default Revisions	Suite 2500	C
☐	A&B Electric Motor Service	2455 Market St	C
☐	Abernathy & Hitch	5907 Fifth Avenue	T
☐	ABF Freight Systems	4567 Navajo Blvd.	V
☐	Able Bakery Company	6767 Primrose Lane	C
☐	Able, Robert/Helen	Dublin Apts/Gateway, Unit 101	T
☐	Ace Chemicals	5700 Busy Road	C
☐	Acme Drilling	Attn: Red Adair	V
☐	Action Energy	1924 S. Navajo Street	C
☐	Adams County	4560 Brighton Blvd	C
☐	A & D Parts Company	4022 Walnut St	V
☐	Aerobelt Conveyance Systems	2330 Broadway	S
☐	A Financial Company - for Training	7900 East Union	O
☐	Air Freight International Carriers, Inc	1201 16th Avenue	V
☐	Airline Travels Inc	5107 DTC Pkwy	V
☐	AIRNS		V
☐	Airport Access Road	9057 N. Airport Blvd.	J

Opt: 1=AB 4=Sel 8=CIF 9=Phone F5=Col 2 Fmt F8=Bank F16=Query F24=More

To locate addresses by alpha name

You can search for addresses by entering a full or partial name, telephone number, parent number, or category code.

On Name Search

1. Complete the following field:
   - Alpha Name
2. Complete any of the following fields to define and / or limit your search:
   - Search Type
   - Person / Corporation
   - Business Unit
   - Category Code
   - Consolidation Code
   - State
   - Country
   - Postal Code

Field	Explanation
Alpha Name	The text that names or describes an address. This 40-character alphabetic field appears on a number of forms and reports. Spaces, dashes, commas, and other special characters should not be entered as they will be ignored by the system when you use this field to search for the name.
Search Type	A user defined code (01 / ST) that identifies the kind of address book record you want the system to select when you search for a name or message. For example: E Employees X Ex-employees V Suppliers C Customers P Prospects M Mail distribution lists *Form-specific information* Placing security on search types might restrict you from viewing certain records. When security is active, a code is required in this field.

Field	**Explanation**
Person / Corp	You can limit your selection to Address Book records for persons or non-person entities. 1 Include only those address book records for persons. 2 Include only those address book records for non-person entities. Blank Include both.

To locate addresses using query search

You must build the Search Word table before you use the query search function. Query search allows you to perform expanded searches on information in the address book, such as who's who category codes, phone numbers, and parent numbers.

Additionally, you can use query search to find all addresses that:

- Match a name, partial name, number, partial number, or any combination thereof
- Have telephone numbers that match the characters entered

On Name Search

1. Complete the following field:
    - Alpha Name
2. Enter as many characters as you want.
3. Choose Query.

To use wildcard with the query search

A wildcard search allows you to use approximate criteria instead of the exact criteria to search for a record. Query Search uses an asterisk (*) to perform wildcard searches. You can use an asterisk after any number of characters. The system searches for all records that match the characters preceding the asterisk.

Forexample:

- If you search on o*, the system locates all records that contain the letter "o."
- If you search on ol*, the system locates all records that contain the two letters "ol."
- If you search on old*, the system narrows its search and locates all records that contain the letters "old."

A wildcard query search locates anything from within the Address Book file including:

- Any occurrence of a sequence of letters or digits
- Category codes (first 10 Address Book category codes)

On Name Search

1. Type your search criteria followed by an asterisk (*) in the following field:
    - Alpha Name
2. Complete any of the following fields to define and / or limit your search:
    - Search Type
    - Person / Corporation
    - Business Unit
    - Category Code
    - Consolidation Code
    - State
    - Country
    - Postal Code
3. Choose Query.

What You Should Know About

Search type security	Search type security is combined with action code security. Settings in the Search Type Security Set Up program (P0103) define the search types and action codes allowed or disallowed for each user or group.
Display formats	In the Name Search (P01200) screen, you can toggle the display formats. Press F2 to toggle Alpha Name / Mailing Name formats. Press F5 to toggle through the following formats: ▪ Address Line 1 ▪ City ▪ Phone Number ▪ Address Book Number ▪ Credit Message

See Also

- Creating the Search Word Table

Enter Address Book Records

Entering Address Book Records

From Address Book (G01), choose **Address Book Revisions**

You use the address book to create and maintain address profiles that are used throughout the JD Edwards World systems.

You enter address book records to create a database of information about your employees, customers, and suppliers, including their addresses and phone numbers.

Complete the following tasks:

- To enter basic address book information
- To enter address book control revisions
- To enter additional phone numbers
- To enter who's who information
- To enter notes for an address book record
- To assign additional category codes

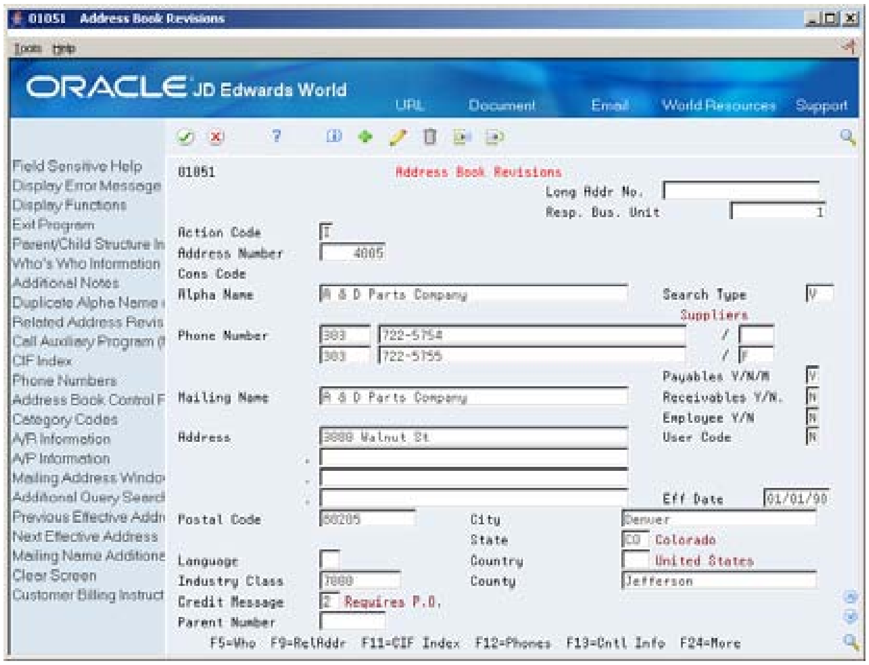
What You Should Know About

Deleting address book records	If you delete an address book record, the system deletes information from the Address Book Master table (F0101) and all related data, such as phone number and customer/supplier master information. You cannot delete address book records that have transaction details or master information existing in files throughout the system. This step is taken to maintain data integrity wherever an address number is used for data access.
Duplicate record protection	The program logic compares Alpha Name, Postal Code, and City fields to identify possible duplicate Address Book entries. Set processing option 15 (Duplicate Data Verification) in your version of Address Book Revisions (P01051) to Blank No duplicate checking 1 Hard error 2 Warning

To enter basic address book information

You enter basic address book information to create employee, customer, and supplier profiles.

On Address Book Revisions


01051 Address Book Revisions
Tools Help
ORACLE JD Edwards World
URL
Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
Parent/Child Structure In
Who's Who Information
Additional Notes
Duplicate Alpha Name
Related Address Revis
Call Auxiliary Program (
CIF Index
Phone Numbers
Address Book Control F
Category Codes
A/R Information
A/P Information
Mailing Address Windo
Additional Query Search
Previous Effective Addr
Next Effective Address
Mailing Name Additiona
Clear Screen
Customer Billing Instruct

01051 Address Book Revisions

Long Addr No.

Resp. Bus. Unit 1

Action Code I

Address Number 4005

Cons Code

Alpha Name A & D Parts Company

Search Type V Suppliers

Phone Number 303 722-5754 /

303 722-5755 / F

Payables Y/N/M Y

Receivables Y/N. N

Employee Y/N N

User Code N

Mailing Name A & D Parts Company

Address 3000 Walnut St

Eff Date 01/01/90

Postal Code 80205

City Denver

State CO Colorado

Language

Country United States

Industry Class 7000

County Jefferson

Credit Message 2 Requires P.O.

Parent Number

F5=Who F9=RelAddr F11=CIF Index F12=Phones F13=Cntl Info F24=More

1. Complete the following fields:
    - Alpha Name
    - Mailing Name
2. Complete the following optional fields:
    - Address Number
    - Long Address Number
    - Phone Prefix
    - Phone Number
    - Phone Type
    - Address (lines 1-4)
    - Postal Code
    - City
    - State
    - Country
    - County
    - Language Preference
    - Industry Class

- Credit Message
- Parent Number

3. To identify the type of address book record, complete the following fields:
    - Responsible Business Unit (optional)
    - Search Type
    - Payables
    - Receivables
    - Employee (optional)
    - User Code (optional)

Field	Explanation
Alpha Name	The 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.
Mailing Name	The company or person to whom billing, payments or correspondence is addressed.
Address Number	A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, and any other Address Book members. *Form-specific information* If you leave this field blank, the system assigns a number using the Next Numbers program.
Long Address Number	A user defined name or number that is unique to the address book number. You can use this field to enter and locate information. You can use it to cross-reference the supplier to a Dun & Bradstreet number, a lease number, or other reference. *Form-specific information* On this form, it is the address book number of the establishment.
Phone Prefix	The prefix (in the US, the area code) for the phone number. The required format for US area codes is three characters in parentheses, for example (303). If you require an alternate format to accommodate non-US area codes, you must change the data display rules in the data dictionary.

Field	Explanation
Phone Number	The free-form telephone number. You can use any applicable telephone number format. For example, the format in Laramie, Wyoming might be 321-5223; in Singapore 011-65-469-8382. When you search for an address using the phone number, you must enter the number exactly as it was set up in the Address Book system. If all phone numbers follow a consistent format, you can specify that format in the data dictionary. For example: ___-____.
Phone Number Type	A user defined code (01/PH) that indicates either the location or use of a phone number. For example: F Fax C Car H Home
Address	The first line of the mailing address in the Address Book system. To duplicate the Alpha Name on an address line, place the cursor on the appropriate address line and press the "Duplicate Alpha Name" function key. This saves duplicate entry of proper names.
Postal Code	The US ZIP code or the postal code attached to the address for delivery in any other country. This code is used as the low end value when doing Postal Code Transaction range processing. *Form-specific information* The US ZIP code or the postal code attached to the address for delivery. This code is used as the low end value when doing Postal Code Transaction processing.
City	The city associated with the address.
State	A code defined for the state or province in the State-Providence/Country Code file (F0075), in conjunction with a country code defined in UDC 00/CN. This code is usually a postal service abbreviation.
Country	A user defined code system 00, type CN which identifies the country. The country code is used in the Address Book system for data selection and address formatting. It has no affect on currency conversion.
County	The name of a county, parish, or other political district that is necessary for the address or for tax purposes.

Field	Explanation
Resp. Bus. Unit	An alphanumeric field 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, or branch / plant. You can assign a business unit to a voucher, invoice, fixed asset, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department. Security for this field can prevent you from locating business units for which you have no authority. Note: The system uses this value for Journal Entries if a value is not entered in the AAI table.
Search Type	A user defined code (01 / ST) that identifies the kind of address book record you want the system to select when you search for a name or message. For example: E Employees X Ex-employees V Suppliers C Customers P Prospects M Mail distribution lists *Form-specific information* JD Edwards World recommends that you use T as the search type for each tax authority. When you enter Address Book information for a new employee, the system automatically enters E in this field.
Payables Y / N / M	A code that identifies the address as a supplier. Valid codes are: Y Yes, this is a supplier. A processing option determines whether the supplier master record automatically displays 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. M This is a miscellaneous, one-time supplier. 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 code tax authorities as suppliers. 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.

Field	**Explanation**
Receivables Y/N	A code that identifies the address as a customer. Valid codes are: Y Yes, this is a customer. A processing option determines whether the customer master record automatically displays after you add an address. N No, this is not a customer. This code does not prevent you from entering an invoice for the address. Code N is informational only, unless you set a processing option. In this case, a warning message appears if both the Receivables and Payables fields are N.
Employee Y/N	A code that indicates whether this address is an employee. Valid codes are: Y Yes, this is an employee. N No, this is not an employee. This code is informational only. It has no predetermined use in the Address Book system. *Form-specific information* When you enter Address Book information for a new employee, the system automatically enters Y in this field.
User Code	A code that you can define in the data dictionary to reference the address. You can use this field to indicate information that is pertinent to your business.
Language Preference	A user defined code (01/LP) that specifies a language to use in forms and printed reports. Before specifying a language, a language code must exist at either the system level or in your user preferences.
Industry Class	A code that classifies goods and services. This code can be in the format of any one of the following systems of classification: ▪ Standard Industrial Classification (SIC) or (NAICS). A numerical system used in the United States to classify goods and services. This code is four (SICS) or six (NAICS). ▪ Harmonized System (HS). The international method of classifying goods. More than fifty countries use this code. It 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. It can be up to six digits.

Field	Explanation
Credit Message	A user defined code (00/CM) that displays information about a particular customer or supplier. Examples: 1 Over credit limit 2 Requires purchase order 3 Not on maintenance agreement 4 Notify the credit manager The Customer Master Revision and the Supplier Master Revision forms display credit messages for customers and suppliers when you enter or locate information.
Parent Number	The Address Book number of a parent company if this is a child company.

What You Should Know About

Entering addresses with effective dates	To enter different addresses by date for the same address book number, set the effective date in the address book constants. You can view the previous and next effective dates on Address Book Revisions. These dates are maintained in the Address by Date table (F0116). You must run the Effective Address Update program to ensure that the system is using the correct address for your address book records.
Address line requirements	You can designate up to six lines for a given address, which includes the mailing name, city, street, and zip code. However, the 1099 form prints only three of the lines. When you enter an address, the last non-blank line must be the street address.
Postal code table	When you enter a postal code, the system assigns default values for city, state, country, and county. A data tape is available from the United States Postal Service that you can use to set up this table. This is available to U.S. clients only.

Double byte processing

If your system is Double Byte enabled, you will have data fields for entering the alternate Alpha Name for the Who's who name and the proper name of the address.

Once you enter an address with an alternate Alpha Name (ALP1), the Address book file servers will return either the alpha name or the alternate alpha name to the calling program for a description. A single byte user in a double byte environment will see the single byte alpha (or alternate alpha name), which is ABALP1. If the system is double byte and the user is also double byte, the user will see the Alpha name or ALPH. The Alpha Name can contain double byte characters; the alternate alpha name can only contain single byte characters.

If you are single byte user in a double byte environment, you should set up your user's preferences in the hidden selection 85 window. Here you must specify a language preference. If you do not specify a language preference, you will see names from the Address Book which are stored in the Alpha name (ALPH).

Related address

Related addresses are used primarily in conjunction with the Send Statement To field (STTO), the Send Invoice To field (SITO), and the Ship-To or Sold To Related Address (RLAB), all of which are in the Customer Master file (F0301). Application programs use the code located in one of those three fields to locate the related address then used in the application.

Related address is identified with a one-character User Defined Code (01/RA). Related addresses are stored in the Related Address file. (F01017). You can define up to 40 related addresses for an Address Book record.

From Address Book Revisions, press F9 to access the Related Address Revisions screen.

Multiple address feature

If you are using the Multiple Address Feature, you will have an additional field on the screen. The Date - Beginning Effective field (EFTB) will be available to enter an effective date for an address.

You may enter an effective date or leave this field blank.

You need to set an Address Constant to indicate if you are using the Multiple Address Feature. You will need to change the Address Effective Date - Address Book Switch field (EFS). The Address Effective Date - Address Book Switch field is maintained through the Address Book Constants program (P0009011).

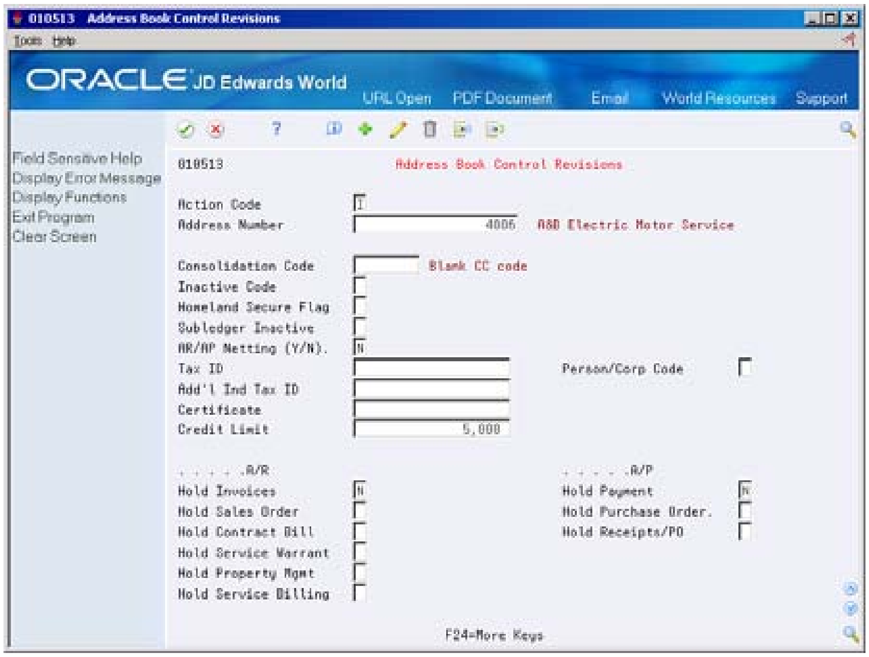
Address Book audit log	An Audit Log file (F0101A) is available to record modifications made to the Address Book Master file (F0101). If you wish to use the audit log, the file F0101A must exist in the same library as the Address Book Master file. If this file does exist, an audit log record will be written for every Address Book Master file modification showing the user, as well as the date and time the change was made. Separate audit log records will be written if the change occurs in the Address Book Information program, the Category Codes program and the A/P or A/R Information program. A processing option is available to designate whether all records should be written to the audit log. The Print Audit Log program (P01430) is provided to view the audit log records.

To enter address book control revisions

You can use the Address Book Control Revisions screen to enter and update Address Book Control fields that need special security, such as tax ID, application hold codes, and credit limits. Controlled fields affect records in Address Book Master (F0101), A/R Ledger (F0301), and A/P Ledger (F0401)

On Address Book Revisions

1. Locate the appropriate address book record.
2. To access Address Book Control Revisions, choose Address Book Control Revisions.


010513 Address Book Control Revisions
Tools Help
ORACLE JD Edwards World
URL Open
PDF Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
Clear Screen
F24=More Keys

```
010513                    Address Book Control Revisions

Action Code                I
Address Number                    4006  A&D Electric Motor Service

Consolidation Code                 Blank CC code
Inactive Code
Homeland Secure Flag
Subledger Inactive
AR/AP Netting (Y/N).       N
Tax ID                                          Person/Corp Code
Add'l Ind Tax ID
Certificate
Credit Limit                     5,000

. . . . . .A/R                                  . . . . . .A/P
Hold Invoices              N                    Hold Payment          N
Hold Sales Order                                Hold Purchase Order.
Hold Contract Bill                              Hold Receipts/PO
Hold Service Warrant
Hold Property Mgmt
Hold Service Billing
```

3. On Address Book -Control Revisions, complete the following optional fields:
    - Consolidation Code

- Inactive Code
- Homeland Security Flag
- AR/AP Netting
- Subledger Inactive
- Person/Corporation Code
- Tax ID
- Additional Individual Tax ID
- Certificate
- Credit Limit
- Application Hold Code

Field	Explanation
Consolidation Code	The Consolidation Code is a way to group associated Address Book numbers in order to report on group financial data. An example would be a chain of stores such as Dollar Stores. You can maintain multiple Address Book numbers, one for each store, in order to have different default, control and statistics associated with each store. However, all stores may be owned and operated by a single corporate entity. A common Consolidation Code lets you report information on an overall basis.
Inactive Code	If the code is set to '1', the entity is inactivated. No further activity or action may be performed against the entity.
Homeland Security Flag	A user defined field (01/HL) that indicates or identifies an Address Book Number in terms of its role in Homeland Security. Valid values are: Blank Passed 1 Terrorist
AR/AP Netting (Y)	A code that indicates whether an address is eligible to be used in the A/R and A/P netting process. This value applies to both the Accounts Receivable and Accounts Payable systems.
Subledger Inactive Code	A code that indicates whether a specific subledger is active or inactive. Any value other than blank indicates that a subledger is inactive. Examples are jobs that are closed, employees that have been terminated, or assets that have been disposed. If a subledger becomes active again, set this field back to blank. If you want to use subledger information in the tables for reports but want to prevent transactions from posting to the master record, enter a value other than blank in this field.

Field	Explanation
Person / Corp Code	A code that designates the type of taxpayer. U.S. clients use one of the following codes with the 20-digit Tax field: C Corporate entity (printed as 12-3456789) P Individual (printed as 123-45-6789) N Non-corporate entity (printed as 12-3456789) Blank Non-corporate entity (not formatted) The system selects suppliers with P and N codes for 1099 reporting. Non-U.S. clients use the following codes with the 20-digit Company field and Individual field: 1 Individual 2 Corporate entity 3 Both an individual and a corporate entity 4 Non-corporate entity 5 Customs authority
Tax ID	The identification code required by various tax authorities. This can be a social security number, federal or state corporate tax ID, sales tax number, and so on. Do not enter separator characters. The system verifies the number and prints the separators in their correct format, according to the value of TAXC (Person / Corporation Code). If there is no value for TAXC, the system does not format this number. When you add new line items to a supplier's worktable record, the supplier master record supplies the default value for the tax ID.
Add'l Ind Tax ID	An additional identification number that a tax authority assigns to an individual.
Certificate	A number that identifies a license or certificate that tax authorities issue to tax-exempt individuals and companies.
Credit Limit	The Credit Limit is the maximum negative balance that a customer can be assigned. The credit limit is retained for a customer account in the Customer Master file (F0301). This field is stored as an integer, no decimals. A zero or blank amount is considered no credit allowed for the customer. If an unlimited credit limit is desired, the user can set a maximum limit by entering a large number, such as 999999999999999.

Field	Explanation
Application Hold Codes	A code that allows you to prevent future entries for the application. Hold Codes are available for the following applications: ▪ Hold Invoices ▪ Hold Sales Order ▪ Hold Contract Bill ▪ Hold Service Warrant ▪ Hold Property Mgmt ▪ Hold Service Billing

What You Should Know About

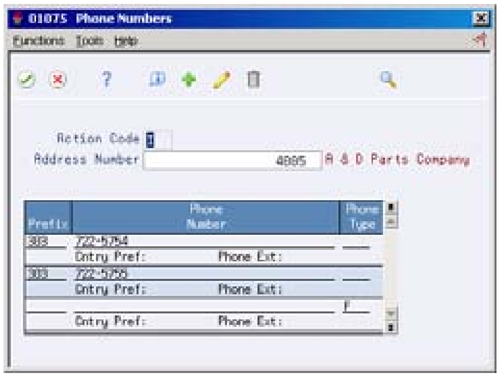
Tax ID field	When preparing a 1099 form, if you have a P or N in the Person/Corporation field, you must enter a tax ID code. Use processing option 1 (Screen Defaults) in your version of Address Book Additional Information (P010513) to specify whether or not the Tax ID field displays on the screen. Leave option 1 blank to display the Tax ID field for input/change or enter a ‘1’ to suppress display of the Tax ID. Use processing option 2 (Duplicate Data Verification) in P010513 to prevent duplication of Tax IDs. Enter a '1' in processing option 2 to prevent duplicate entry of Tax ID. If blank, duplicate Tax ID is allowed.

To enter additional phone numbers

You can enter an unlimited number of phone numbers for each address book number. You can specify different types of phone numbers, such as car, cellular, or fax.

On Address Book Revisions

1. Locate the appropriate address book record.
2. To access Phone Numbers, choose Phones.



Action Code
Address Number 4885 A & D Parts Company

Prefix	Phone Number	Phone Type
303	722-5754 Cntry Pref: Phone Ext:	
303	722-5756 Cntry Pref: Phone Ext:	
	Cntry Pref: Phone Ext:	

3. On Phone Numbers, complete the following fields:
   - Prefix
   - Phone Number
   - Phone Type

Field	Explanation
Prefix	The prefix (in the US, the area code) for the phone number. The required format for US area codes is three characters in parentheses, for example (303). If you require an alternate format to accommodate non-US area codes, you must change the data display rules in the data dictionary.
Phone Number	The free-form telephone number. You can use any applicable telephone number format. For example, the format in Laramie, Wyoming might be 321-5223; in Singapore 011-65-469-8382. When you search for an address using the phone number, you must enter the number exactly as it was set up in the Address Book system. If all phone numbers follow a consistent format, you can specify that format in the data dictionary. For example: ___-____.
Phone Type	A user defined code (01/PH) that indicates either the location or use of a phone number or an e-mail address. For example: ▪ F - Fax ▪ C - Car ▪ H - Home ▪ HEMG - Home Emergency Contact ▪ I - Internet ▪ WEMG - Work Emergency Contact

What You Should Know About

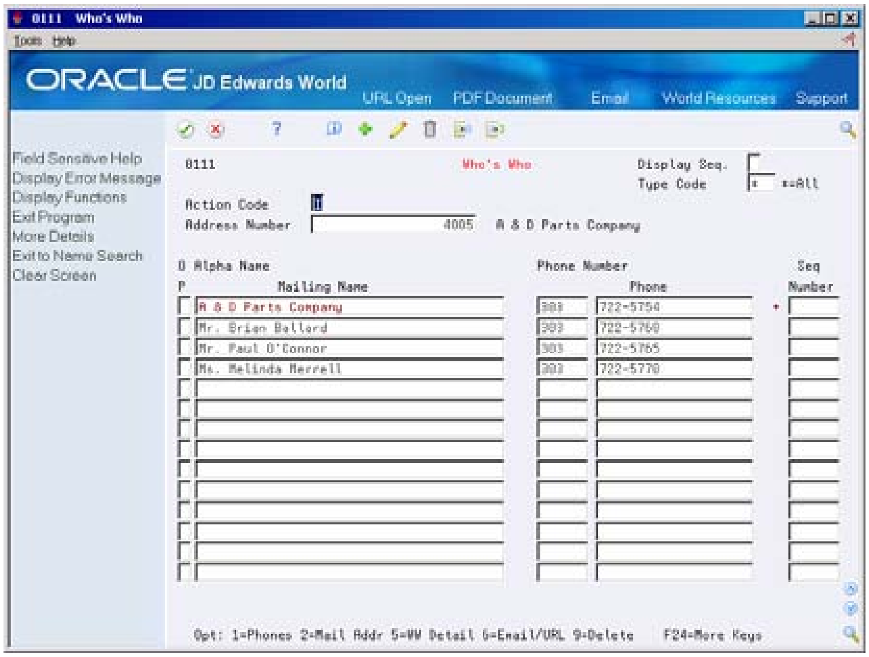
Multiple phone numbers	If you have multiple phone numbers for an individual mailing name, a + (plus sign) appears between the Phone and Sequential Number fields.

To enter who's who information

For each address, you can create a list of associated contacts that is called who's who. You can enter names, phone numbers, and other information for the people that you contact for sales, billing and collections, and ordering.

On Address Book Revisions

1. Locate the appropriate address book record.
2. To access Who's Who, choose the Who option.


0111 Who's Who
Tools Help
ORACLE JD Edwards World
URL Open
PDF Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
More Details
Exit to Name Search
Clear Screen

0111 Who's Who

Display Seq.

Type Code * *=All

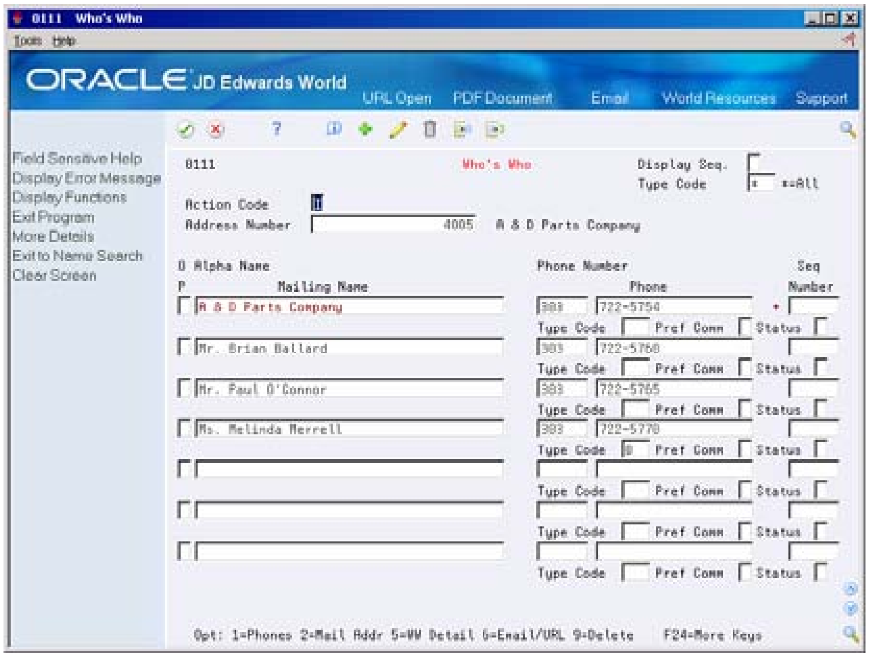
Action Code I

Address Number 4005 A & D Parts Company

O P	Alpha Name Mailing Name	Phone Number	Phone		Seq Number
☐	A & D Parts Company	303	722-5754	+	
☐	Mr. Brian Ballard	303	722-5760		
☐	Mr. Paul O'Connor	303	722-5765		
☐	Ms. Melinda Merrell	303	722-5770		

Opt: 1=Phones 2=Mail Addr 5=WW Detail 6=Email/URL 9=Delete F24=More Keys

3. On Who's Who, complete the following fields:
   - Display Sequence (optional)
   - Mailing Name
   - Phone Number (optional)
   - Sequence Number (optional)
4. Access the detail area.


0111 Who's Who
Tools Help
ORACLE JD Edwards World
URL Open
PDF Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
More Details
Exit to Name Search
Clear Screen

0111 Who's Who

Display Seq.
Type Code * *=All

Action Code I
Address Number 4005 A & D Parts Company

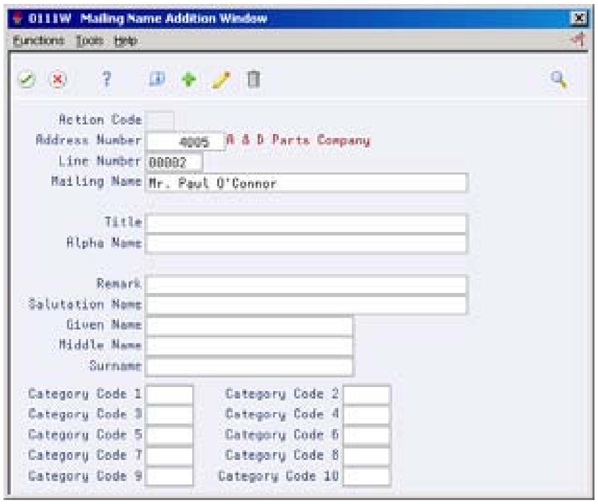
O P	Alpha Name / Mailing Name	Phone Number	Phone	Seq Number
☐	A & D Parts Company	303	722-5754	*
☐	Mr. Brian Ballard	303	722-5760	
☐	Mr. Paul O'Connor	303	722-5765	
☐	Ms. Melinda Merrell	303	722-5770	
☐				
☐				
☐				

Type Code ☐ Pref Comm ☐ Status ☐

Opt: 1=Phones 2=Mail Addr 5=WW Detail 6=Email/URL 9=Delete F24=More Keys

5. Complete the following optional field:
   - Type Code

6. To add additional who's who information to a record, next to the appropriate mailing name, choose Who's Who Detail to access Mailing Name Addition Window.


0111W Mailing Name Addition Window
Functions Tools Help

Action Code
Address Number 4005 A & D Parts Company
Line Number 00002
Mailing Name Mr. Paul O'Connor

Title
Alpha Name

Remark
Salutation Name
Given Name
Middle Name
Surname

Category Code 1 Category Code 2
Category Code 3 Category Code 4
Category Code 5 Category Code 6
Category Code 7 Category Code 8
Category Code 9 Category Code 10

7. On Mailing Name Addition Window, complete the following optional fields:
   - Title
   - Alpha Name
   - Remark
   - Salutation Name
   - Given Name

- Middle Name
- Surname
- Category Code

Field	Explanation
Display Sequence	A code that indicates the order in which you want data to be presented on the screen. If you leave this field blank, the system uses 0. *Form-specific information* Valid values are: 0 By sequence number 1 By alpha name 2 By order of entry into system
Type Code	A user defined code (system 01, type WO) that identifies the Who's Who entry. Examples: S Student B Billing contact T 1099 legal name
Title	Used to enter the professional title of a contact person.
Alpha Name	The 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.
Remark	A 40-character field that you can use to enter free-form text.
Salutation Name	The name you would use to address the individual in written correspondence. For example: Ms. Green, Dr. Strasheim, Herr Obermeyer, Mr. Pitt. This field is informational only.
Given Name	The first name of an individual. This field is informational only.
Middle Name	The middle name of an individual. This field is informational only.
Surname	The surname of an individual. This field is informational only.

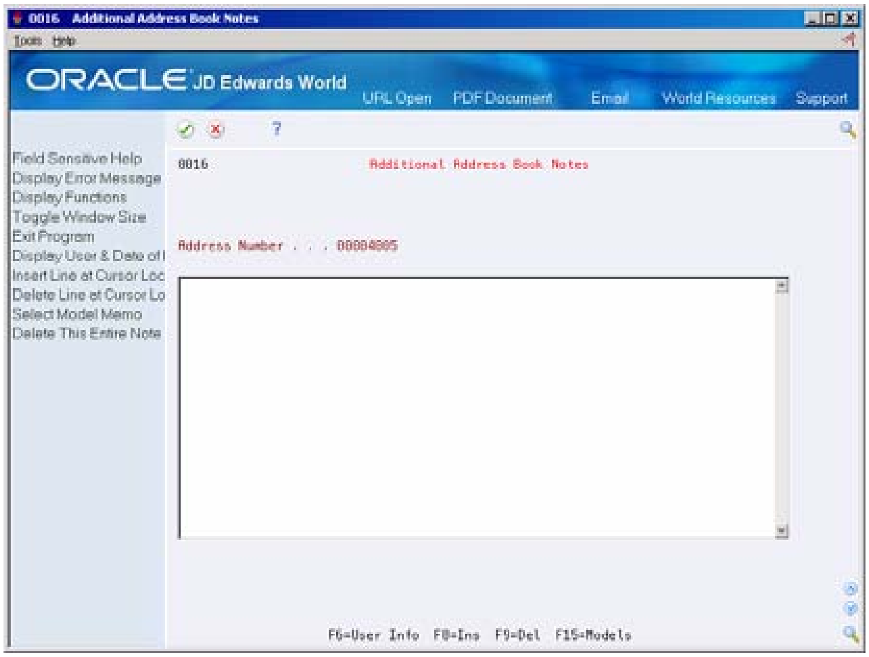
Field	Explanation
Category Code 1	One of ten reporting codes that you can assign to names in the Who's Who list. Use these codes to identify names for special mailing lists, phone directories, and so on. Category codes are user-defined (system 01, types W0 through W9). Examples: 01 New contact or employee 02 Christmas card mailing list 03 Alumni mailing list 04 Credit officer

To enter notes for an address book record

You can enter notes about your customers, suppliers, and employees.

On Address Book Revisions

1. Locate the appropriate address book record.
2. To access Additional Address Book Notes, choose Additional Notes.


0016 Additional Address Book Notes
Tools Help
ORACLE JD Edwards World
URL Open
PDF Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Toggle Window Size
Exit Program
Display User & Date of I
Insert Line at Cursor Loc
Delete Line at Cursor Lo
Select Model Memo
Delete This Entire Note
F6=User Info F8=Ins F9=Del F15=Models

0016 Additional Address Book Notes

Address Number . . . 00004005

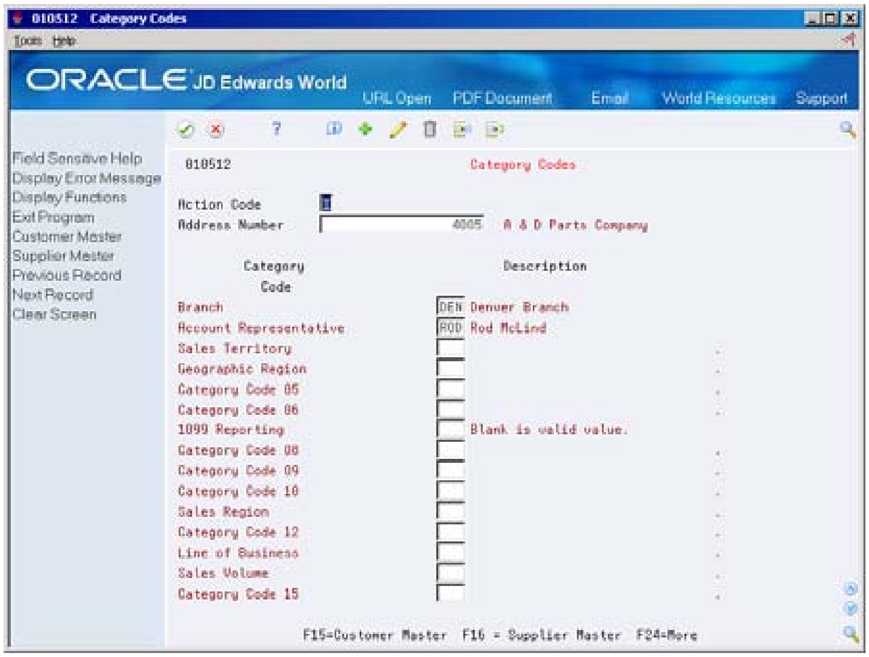
3. On Additional Address Book Notes, enter text.
4. If you have a model or standard memo set up, do one of the following:
   - Access the appropriate model
   - Change the text of the model, as needed
5. Use the Change action.

To assign additional category codes

You can assign category codes to your address book records for reports and mailings. For example, you can assign category codes to a record to merge it with other addresses for a sales territory, salesperson, and so on.

On Address Book Revisions

1. Complete the following field:
   - Address Number
2. To access Category Codes, Press F14.


010512 Category Codes
Tools Help
ORACLE JD Edwards World
URL Open
PDF Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
Customer Master
Supplier Master
Previous Record
Next Record
Clear Screen

010512 Category Codes

Action Code

Address Number 4005 A & D Parts Company

Category Code		Description
Branch	DEN	Denver Branch
Account Representative	ROD	Rod McLind
Sales Territory		
Geographic Region		
Category Code 05		
Category Code 06		
1099 Reporting		Blank is valid value.
Category Code 08		
Category Code 09		
Category Code 10		
Sales Region		
Category Code 12		
Line of Business		
Sales Volume		
Category Code 15		

F15=Customer Master F16 = Supplier Master F24=More

3. On Category Codes, enter a value in the unlabeled field.

Processing Options

See Address Book Revisions (P01051).

Review Address Book Records for 1099s and W2s

Reviewing Address Book Records for 1099s and W2s

For U.S. clients, reviewing the accuracy of address book records is an important part of preparing for tax processing. The Internal Revenue Service (IRS) has certain requirements for 1099 and W2 tax processing.

To ensure compliance with the IRS requirements, review your address book records and follow these guidelines:

- Set up all companies in the address book.
- Ensure that you have three lines for an address and four lines for a sole proprietor. These are the maximum numbers of lines that are permitted on the respective government forms.
- Ensure that you have the company / individual name in the Mailing Name field. The system prints the mailing name on line 1 of government forms.
- Ensure that the last non-blank line is a street address. The system prints the last non-blank line of the mailing address for the street address and prints the city, state, and postal code from those fields, rather than from the address line fields.
- If a 1099 is to be sent outside the country, verify that the appropriate value (F for foreign address) is entered in the Payables field. The system notes these on the 1099 transmittals.
- For sole proprietorship, verify that the legal name (T for 1099 legal name) of the company is in the Alpha Name field. Then, enter owner information as follows:
- Ensure that you enter an appropriate value in the Person / Corporation Code field.
  - On Who’s Who, enter the owner’s name and the appropriate option in the Type Code field.
  - On Address Book Revisions - Additional Information, enter the owner’s tax identification code.

See Also

- *About 1099s* in the *Accounts Payable Guide*

3 Auxiliary Address Book Information

Overview to Auxiliary Address Book Information

Objectives

- To add alternate mailing addresses to an address book record
- To enter socio-economic information in your address book records
- To enter related address to an address book record
- To create and use address book user reserved fields
- To select and revise email/URL addresses in the Who's Who records

About Auxiliary Address Book Information

After you create address book records, you can use the Auxiliary Address Book information to maintain information about companies and people with whom you do business.

You may have multiple addresses for an Address Book with each being identified with a User Defined Code called Address Type (01/AT). This type could indicate things like Home, Work, Post Office Box, etc. In addition, you may enter separate addresses, and multiples based on the Address Type, for every Who's Who contact associated with an Address Book.

Some countries require you to maintain statistics on companies and individuals you do business with. These socio-economic, or diversity, factors may vary by country or states. The Socio-Economic file and associated programs let you to design custom information to work for your particular needs.

Related Addresses are used primarily in conjunction with the Send Statement To field (STTO), the Send Invoice To (SITO) field, and the Ship-To or Sold-To Related Address (RLAB), all of which are in the Customer Master file (F0301). Application programs, such as Sales Order Processing and Purchase Order Processing, use the code located in one of those three fields to locate the related address then used in the application..

Additional user reserved information associated with an address number and type can be maintained in the Address Book -User Reserved program (P0155). Various alpha and numeric fields, as well as date fields and 10 byte category codes can be utilized to record information unique to your company's business requirements.

Email/URL selection and revisions programs allows you to store and inquire Email/URL addresses associated with Address Book Who's Who records. Emails can be sent and URL addresses can be browsed from this program invoking the corresponding PC application.

Work with Address Revisions

About Working with Address Revisions

From Address Book (G01), choose **Auxiliary Address Book Info**
From Auxiliary Address Book Info (G0111), choose **Address Revisions**

You may have multiple addresses for an Address Book with each being identified with a User Defined Code called Address Type (01/AT). This type could indicate things like Home, Work, Post Office Box, etc. In addition, you may enter separate addresses, and multiples based on the Address Type, for every Who's Who Contact associated with an Address Book. The following Address Type codes are hard coded for future use across JD Edwards World Financials and Distribution systems:

- BILL - Billing Address
- INV - Send Invoice To
- STMT - Send Statement To

The Address Revisions program (P0116) allows you to display and enter the multiple addresses for the Address Book itself or any one of the contacts.

There are some considerations you need to keep in mind. The Effective Date field allows you to enter multiple addresses that represent past, current and future dates. This process is still valid but ONLY for the main Address Book number (the Who's Who Line number equals ZERO) and for just the main Address Type (the Address Type field equals BLANK). If you are entering dates for one of the Who's Who contacts or for any Address Type other than Blank (which is the Main Address Type), you may only enter one of these, regardless of what you put in the Effective Date field. The Effective Addresses field lets you display effective addresses, only by default, or display all addresses, past, present, and future.

Procedures

The main Address Book address may still be entered through Address Book Master (P01051) and Address Book Window (P01AB) as you have always done. All other Address Types and addresses for Who's Who contacts should be entered using the Address Revisions program.

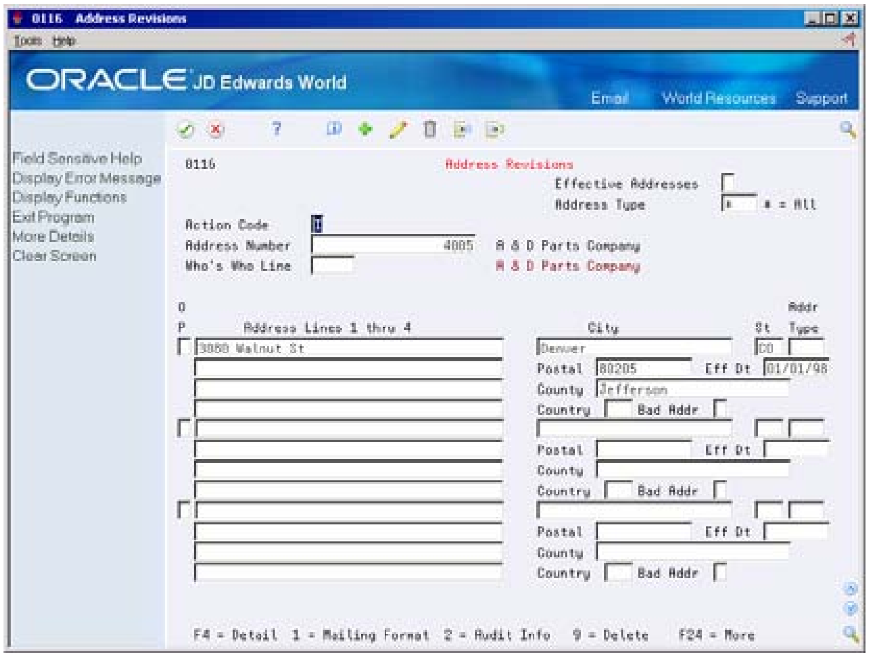
The program includes the capability to track or log past addresses. When you delete an address using this program, that address will automatically be written to the log file (F0116A). You can then enter the current or effective address.

Duplicate Entry Checking

The file key is AN8, IDLN, ADTP, EFTB. The system prevents you from entering a duplicate record by comparing all 4 fields if the IDLN = 0 and the ADTP = blank, since this indicates the main Address Book address. You may vary the Effective Dates to enter past or future dates against the main Address Book. If you are entering an address for something other than the main Address Book address, any non-blank Address Type OR for a Who's Who Contact (IDLN is not equal to zero), the system compares just the AN8, IDLN and the ADTP to determine duplicate entry and provide an error.

To enter address revisions

On Address Revisions


0116 Address Revisions
Tools Help
ORACLE JD Edwards World
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
More Details
Clear Screen

0116 Address Revisions

Effective Addresses ☐

Address Type * * = All

Action Code I

Address Number 4005 A & D Parts Company

Who's Who Line A & D Parts Company

O P	Address Lines 1 thru 4	City	St	Addr Type
☐	3080 Walnut St	Denver	CO	

Postal 80205 Eff Dt 01/01/98

County Jefferson

Country Bad Addr ☐

F4 = Detail 1 = Mailing Format 2 = Audit Info 9 = Delete F24 = More

1. Complete the following field:
   - Address Number
2. Access the detail area (F4).
3. Complete the following fields for each entry:
   - Address Lines 1 through 4
   - City
   - ST
   - Addr Type
   - Postal code
   - Effective Date
   - County

- Country
- Bad Addr

4. Press Enter.

Field	Explanation
Effective Addresses	A field that controls the display of Address Book addresses. The following are valid values: blank Display Effective Address only 1 Display ALL Addresses (Past, Present, Future)
Address Line 1	The first line of the mailing address for an employee, customer, or supplier in the Address Book system. The Internal Revenue Service (IRS) restricts the size of the address that prints on an employee's year-end tax returns. To comply with IRS regulations, the system uses the following restrictions: ▪ On W-2 returns, the system prints only the last three nonblank address lines plus the city, state, and postal code. ▪ On 1099 returns, the system prints only the last nonblank address line plus the city, state, and postal code. ▪ On U.S. federal magnetic media, the system writes only the last nonblank address line plus the city, state, and postal code.
Address Lines 2 through 4	Attention Payroll users: The Internal Revenue Service (IRS) restricts the size of the address that prints on employee's year-end forms. To comply with IRS regulations, the address that prints on W-2 forms includes only the last three nonblank address lines plus the city, state, and postal code. The address that prints on 1099 forms includes only the last nonblank address line plus the city, state, and postal code. If you process year-end information using the federal magnetic media format, the address that prints on those forms contains only the last nonblank address line plus the city, state, and postal code.
City	The city component of the address.
ST	The code for state or province component of an address.
Postal	The United States ZIP code or the postal code attached to the address for delivery in other countries. This code is used as the low end value when doing Postal Code Transaction range processing.

Field	Explanation
Addr Type	User defined code (01/AT) for address type. You can have multiple address for an address book entity, but only one with the same address type. Select from the following valid values, or add your own values to UDC 01/AT.: ▪ Blank - Main Address ▪ BANK - DLE Funds Transfer ▪ BILL - Billing Address (Hard Coded) ▪ HOME - Home Address ▪ INV - Send Invoice To (Hard Coded) ▪ PO - P.O. Box ▪ STMT - Send Statements To(Hard Coded) ▪ WORK - Work
Effective Date	The date when an address, item, transaction, or table becomes active, or the date from when you want transactions to appear. The way that the system uses this field depends on the program. For example, the date that you enter in this field might indicate when a change of address becomes effective; or it could be a lease effective date, a price or cost effective date, a currency effective date, a tax rate effective date, and so on.
County	A user defined code (00/CT) that denotes the name of a county, parish, or other political district that is necessary for the address or for tax purposes.
Country	A 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.
Bad Addr	A user defined code (01/BA) that indicates the reason this particular address is no longer valid. This could be used to indicate that mail has been returned as undeliverable but this is the last and only address you have for this address book number and cannot just delete it. Select from the following valid values: R Returned Mail 1 Returned - No Forwarding Addr 2 Not Deliverable as Addressed

What You Should Know About

City, County, and Postal codes	The county field in the Postal Code Transactions File (F0117) is a file key to make it possible to have the same Postal Code for different counties. This allows you to report tax to various counties within one city or with common postal codes.

Enter Socio-Economic Information

Overview

Some countries require you to maintain statistics on companies and individuals you do business with. These socio-economic, or diversity, factors may vary by country or states. The Socio-Economic file and associated programs were designed to be flexible and allow you to design them to work for your particular needs.

The Socio-Economic file (F01014) has several fields that are generic in name but provide a place for basic government numbers and agencies. We also have dates in case you have official documents that have effective and expiration dates.

The main part of the file; however, are the 30 diversity code fields (DV01 through DV30) that allow you to define and then track different socio-economic indicators.

Oracle has set up four examples of categories required by the U.S. federal government. You are free to change these or use them or just leave them as is and use the other codes available.

The federal standard diversity codes, with their predefined selection values are shown in the table below. You may use this as a model to add your own diversity codes.

Field	**Description**	**UDC**	**Predefined Values**
DV01	Veteran	01 / A1	DVET - Disabled Veteran VET - Veteran
DV02	Woman	01 / A2	1 Woman
DV03	Minority	01 / A3	1 Asian American 2 African American 3 Hispanic American 4 Native American
DV04s	Business Size	01 / A4	1 Small Business

Set-Up

To set up the categories you need, you only need to change the User Defined Code Descriptions and add the User Defined Code values allowed for each of the Diversity Codes.

For example, you want Diversity Code 04 to represent a category called 'Geographic Location'. You would go to User Defined Codes for 01 / A4 (the associated codes for DV04 as found in your Data Dictionary). You press F5 to get to the User Defined Code Types for System 01 and you change the description for Code Type A4 to 'Geographic Location'. Press F3 to return to General User Defined Codes and enter the codes available for Geographic Locations.

Note: You may not define Blank as a valid value. The programs that deal with the Socio-Economic file (F01014) work under the assumption that if the code for a particular category is blank, it is NOT populated and the address does not fall into that category in any respect.

Maintaining Socio-Economic Data

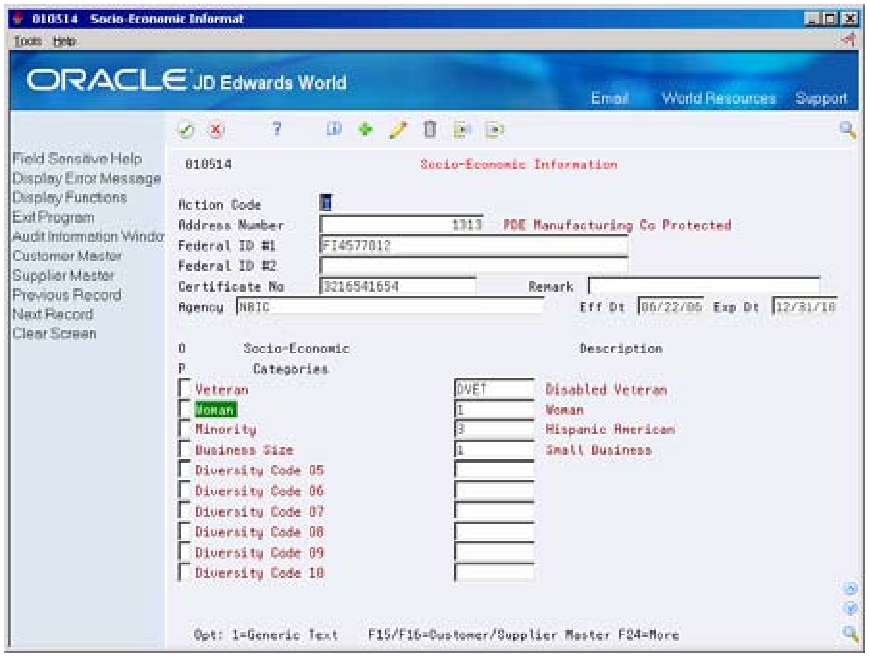
From Address Book (G01), choose Auxiliary Address Book Info
From Auxiliary Address Book Info (G0111), choose Socio-Economic Information

You may only enter data to the Socio-Economic file for valid Address Book numbers already entered to the system.

You may add a record to this file, change it or delete it if you no longer require this information. The Socio-Economic Report (P01435) is available to print this information.

To add socio-economic information to an address book record

On Socio-Economic Information

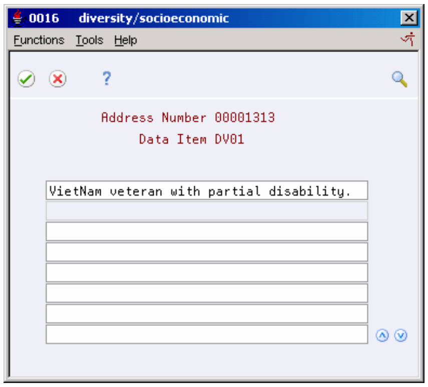

010514 Socio-Economic Informat
Tools Help
ORACLE JD Edwards World
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
Audit Information Windo
Customer Master
Supplier Master
Previous Record
Next Record
Clear Screen

```
010514                         Socio-Economic Information

Action Code      I
Address Number               1313  POE Manufacturing Co Protected
Federal ID #1    FI4577012
Federal ID #2
Certificate No   3216541654            Remark
Agency        NBIC                        Eff Dt 06/22/06  Exp Dt 12/31/10

O       Socio-Economic                          Description
P         Categories
☐ Veteran                          DVET     Disabled Veteran
☐ Woman                            1        Woman
☐ Minority                         3        Hispanic American
☐ Business Size                    1        Small Business
☐ Diversity Code 05
☐ Diversity Code 06
☐ Diversity Code 07
☐ Diversity Code 08
☐ Diversity Code 09
☐ Diversity Code 10

  Opt: 1=Generic Text    F15/F16=Customer/Supplier Master F24=More
```

1. Complete the following fields:

   - Address Number
   - Federal ID #1
   - Federal ID #2
   - Certificate No.
   - Agency
   - Eff Dt
   - Exp Dt

2. Complete one or more of the Socio-Economic Category fields, as needed.
3. To add additional comments to a Socio-Economic Category entry, choose option 1 to display the Generic Text window.



Address Number 00001313
Data Item DV01

VietNam veteran with partial disability.

4. Press Enter.

> **Note:** Entries with additional text display a highlighted Socio-Economic Category field.

Field	**Explanation**
Address Number	The address book number to which you are adding socio-economic data.
Federal ID #1	The Federal Identification (tax) number.
Federal ID #2	Second Federal Identification (tax) number.
Certificate No	Diversity Certificate is a user defined code (01/DV) that identifies a particular characteristic or description of an individual or business that puts it into a protected or special government class. This could indicate a minority owned business, a business located in a HUB zone, etc.
Agency	This is the Agency Name that certified this business.
Eff Dt	The date the entity is active and available for use.

Field	Explanation
Exp Dt	The date the entity is no longer active and available for use.

Enter Related Addresses

Overview

Related Addresses are used primarily in conjunction with the Send Statement To field (STTO), the Send Invoice To (SITO) field, and the Ship-To or Sold-To Related Address (RLAB), all of which are in the Customer Master file (F0301). Application programs, such as Sales Order Processing and Purchase Order Processing, use the code located in one of those three fields to locate the related address then used in the application.

You use the Related Addresses program (P01017) to maintain the related addresses. Because the Address Book system identifies the related addresses with a one character code, you can have around 40 related addresses associated with your Address Book number.

Set-Up

The related address is identified with a one character code. This is a User Defined Code and these values must be predefined in the User Defined Code 01/RA.

There are a few codes that are hardcoded with a predefined usage. This is nothing new but these hardcoded values are not permitted to be entered here in this program. They are:

Code	Description
C (or blank)	Address Number
P	Parent Number
N	No Print
5	Special/Factor Payee

Retrieving Related Addresses

There is a server program (XS01017) that the application programs use to retrieve the related address indicated by our STTO, SITO, and RLAB fields. It takes the code entered and reads the Related Address file (F01017) and returns with the address indicated if it can be found. If it is not found, the main address is returned to the application program, so there is no need to enter related addresses that are equal to the main address itself. In fact, you will receive an error if you try to enter a related address that either doesn't exist in the Address Book file (F0101) or is equal to the main address itself.

This server also takes into account those hardcoded values and if the 'P' is requested through the server by the application program the server retrieves the Parent Number and return that. If 'C' or blank is requested, the address itself will be returned. If 'N' is requested, an error is returned. And if '5' is requested, the AN85 from the Address Book file (F0101) is returned.

Technical Considerations

The system keeps the related addresses in the Address Book file (F0101) in sync with the corresponding addresses in the Related Addresses file (F01017). This enables you to continue using just those six addresses in applications if you do not want to implement and take advantage of the new codes.

Before You Begin

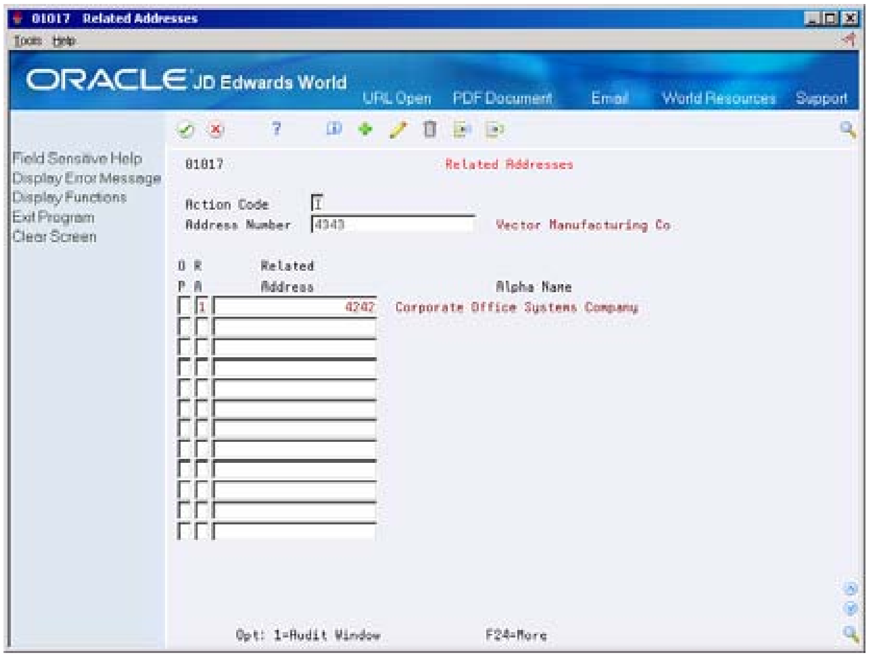
- Set up User Defined Codes in 01/RA.

Entering Related Addresses

	From Address Book (G01), choose **Auxiliary Address Book Info** From Auxiliary Address Book Info (G0111), choose **Related Addresses**

To enter related address information

On Related Addresses


01017 Related Addresses
Tools Help
ORACLE JD Edwards World
URL Open
PDF Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
Clear Screen

01017 Related Addresses

Action Code I

Address Number 4343 Vector Manufacturing Co

O P	R A	Related Address	Alpha Name
☐	1	4242	Corporate Office Systems Company

Opt: 1=Audit Window F24=More

1. Choose the Add action.
2. Complete the following fields for each related address:
   - Address Number
   - RA
   - Related Address
3. Press Enter.

Field	Explanation
Address Number	The Address Book number to which you are adding related addresses.
RA	The User Defined Code assigned to the related address. Set up in UDC 01/RA.
Related Address	The Address Book number of the related address.

Work with Address Book User Reserved Fields

Additional user reserved information associated with an address number and type can be maintained in the Address Book -User Reserved program (P0155). A line number as part of the key can be maintained if needed in future use. Various alpha and numeric fields, as well as date fields and 10 byte category codes can be utilized. Category codes and values can be defined in UDC tables 00/R0 through 00/R9.

Access to Name Search, Who's Who, Generic Text, Email/URL Addresses and Audit Windows are available from the Address Book -User Reserved screen (P0155).

Different industries have requirements for maintaining information such as:

- Insurance carriers, policy numbers, and renewal or expiration dates
- Certificate or certification numbers
- Drivers license numbers
- Bonding information
- Permits
- Training

The user reserved fields provide you with the flexibility to define and store unique information associated with an address book record. Each organization must determine how best to use these fields, and set up the user defined code tables, accordingly.

Set Up

You need to set up user defined codes for User Reserved Types in table 00/T1. Examples include:

- INS - Insurance
- PRM - Permits
- TRN - Training

You also need to set up user defined codes for any or all of the category codes that you will use. All user reserved types share the same set of 10 category code fields, but you can use different category code fields or different category code values for various reserved record types. For example, you might use values from category code 01 (00/R1) with INS type records, and category code 03 (00/R3) for TRN record types.

Entering User Reserved Information

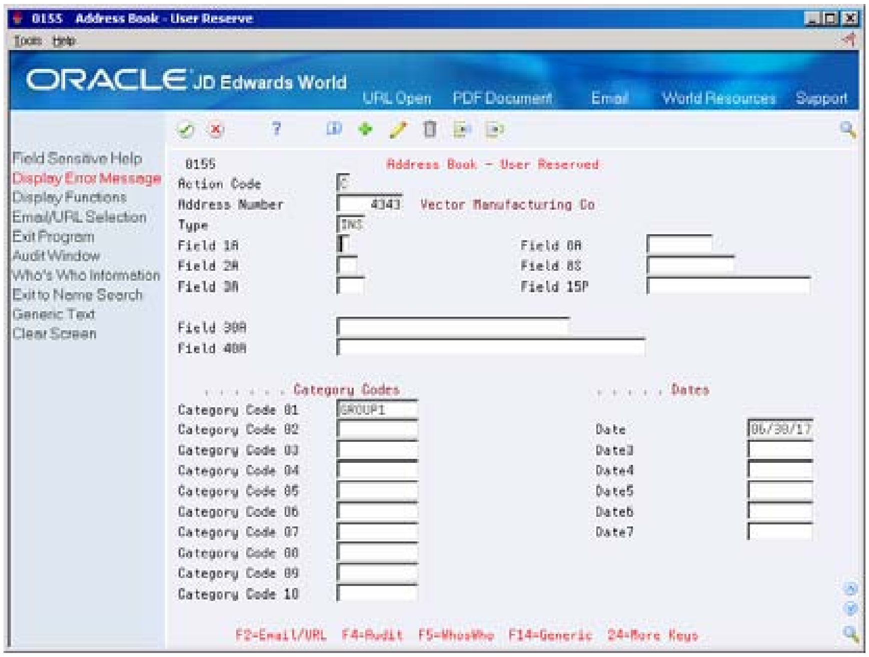
From Address Book (G01), choose **Auxiliary Address Book Info**
From Auxiliary Address Book Info (G0111), choose **Address Book - User Reserved**

Before You Begin

- Set up User Reserved Type codes in 00/T1
- Set up User Reserved Category Codes in 00/R0 through 00/R9

To add user reserved information to an Address Book record

On Address Book - User Reserved


0155 Address Book - User Reserve
Tools Help
ORACLE JD Edwards World
URL Open
PDF Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Email/URL Selection
Exit Program
Audit Window
Who's Who Information
Exit to Name Search
Generic Text
Clear Screen
F2=Email/URL F4=Audit F5=WhosWho F14=Generic 24=More Keys

```
0155                    Address Book - User Reserved
Action Code        C
Address Number     4343  Vector Manufacturing Co
Type               INS
Field 1A                           Field 8A
Field 2A                           Field 8S
Field 3A                           Field 15P

Field 30A
Field 40A

 . . . . . . Category Codes              . . . . . Dates
Category Code 01   GROUP1
Category Code 02                         Date       06/30/17
Category Code 03                         Date3
Category Code 04                         Date4
Category Code 05                         Date5
Category Code 06                         Date6
Category Code 07                         Date7
Category Code 08
Category Code 09
Category Code 10
```

1. Choose the Add action code.
2. Complete the following required fields:
   - Address Number
   - Type
3. Complete the following optional user reserved fields, as needed:
   - Field 1A through Field 3A
   - Field 8A
   - Field 8S
   - Field 15P
   - Field 30A

- Field 40A
- Date
- Date3 through Date7
- Category Code 01 through Category Code 10

4. Press Enter.

Field	Explanation
Address Number	The Address Book number to which you are added user reserved information.
Type	A User Defined Code (00/T1) that identifies the User Reserved Type Code. For example: Blank default INS Insurance TRN Training
Field 1A through Field 3A	Alphanumeric user reserved fields that allow free text entry. The number in the field label indicates the field length.
Field 8A and Field 8S	Eight-character numeric user reserved fields that allow free text entry.
Field 15P, Field 30A and Field 40A	Alphanumeric user reserved fields that allow free text entry. The number in the field label indicates the field length.
Date and Date3 through Date7	User reserved date fields
Category Code 01 through Category Code 10	User reserved category code fields. User defined code values must be set up in 00/R0 through 00/R9.

What You Should Know About

Type code settings	The key to file F0155 is Address Number, Type (user defined values that can be setup in UDC 00/T1), and Line Number (zero unless changed by the user). You can pre-load a Type Code (validated in UDC 00/T1) to the P0155 entry screen in processing option 1. If you want to protect this field, enter a '1' in processing option 2 and users can maintain only that Type Code (for example, INS=Insurance) for Address Numbers. When the Type Code is left blank and therefore unprotected, or the Protect processing option is left blank, users may maintain all Address/Type records.

User defined codes	Category codes and values can be defined in UDC 00/R0 through 00/R9. The system provides a 10-character alphanumeric field for the user defined codes. Description 1 and Description 2 fields are available to contain explanatory text for each code.
Alphanumeric fields	The generic labels on the alphanumeric fields indicate the field length. These are free text entry fields to be used as determined by your organization.
Date fields	The fields Date and Date3 through Date7 give you eight available fields to store date information, as needed.
Vocabulary overrides	Your system administrator can use the Vocabulary Override function to customize the generic labels for alphanumeric and date fields on the P0155 screen. See *Working with Vocabulary Overrides* in the *Technical Foundation Guide*.

Work with Address Book Email/URL Selections

About Working with Address Book Email/URL Selections

Working with Address Book Email/URL selection consists of the following:

- Using Address Book Email/URL Selection
- Entering Address Book Email/URL Revisions

Email/URL Selection(P01018S) allows you to inquire on email and URL addresses based on different user's selection criteria. Emails can be sent and URL addresses can be browsed from this program invoking the corresponding PC application.

Email/URL Revisions (P01018) allows you to store and inquire Email/URL addresses associated with Address Book Who's Who records. Emails can be sent and URL addresses can be browsed from this program invoking the corresponding PC application.

Using Address Book Email/URL Selection

From Address Book (G01), choose **Auxiliary Address Book Info**
From Auxiliary Address Book Info (G0111), choose **Email/URL Selection**

All records can be inquired with the selection proposed at the time the program is invoked, Address Book is blank and the rest of selection fields with asterisks. Selection criteria can be entered for a specific Address Book number. An email can be sent or a URL address can be browsed from this program.

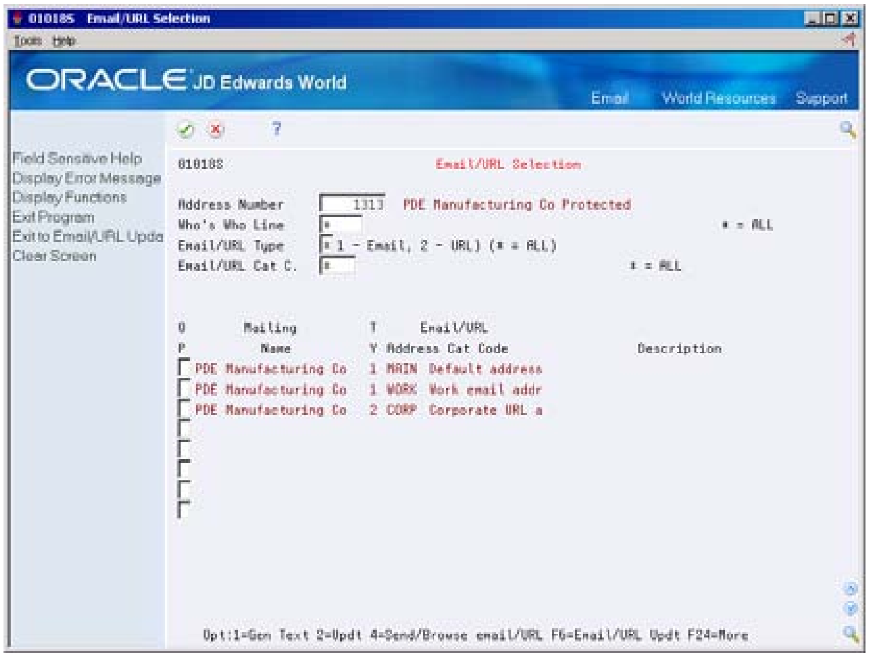
Note: This feature is available if Client Access 5250 emulator is being used. Emulator Type must be setup to "1" in the User Display Pref Revisions (Hidden Selection 85).

Only the first 117 positions of the "Email or URL" field will be passed to the PC application invoked. For example if the PC application to browse a URL larger than 117 positions long, including "http://" or "https://", it will be truncated passing only the first 117 positions to the Web browser.

You can use the Update option for a selection to review or revise a selected record, or use the Exit to Email/URL Update program function (F6) add change, or delete records in the Email/URL Revisions program (P01018).

To make an Email/URL selection

On Email / URL Selection


010185 Email/URL Selection
Tools Help
ORACLE JD Edwards World
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
Exit to Email/URL Upda
Clear Screen

```
01018S                          Email/URL Selection

Address Number    1313   PDE Manufacturing Co Protected
Who's Who Line    *                                           * = ALL
Email/URL Type    * 1 - Email, 2 - URL) (* = ALL)
Email/URL Cat C.  *                                   * = ALL

O      Mailing          T      Email/URL
P       Name            Y Address Cat Code              Description
  PDE Manufacturing Co   1 MAIN  Default address
  PDE Manufacturing Co   1 WORK  Work email addr
  PDE Manufacturing Co   2 CORP  Corporate URL a

   Opt:1=Gen Text 2=Updt 4=Send/Browse email/URL F6=Email/URL Updt F24=More
```

1. Complete the following field to select a record:
   - Address Number
2. Complete one or more of the following fields to narrow your selection:
   - Who's Who Line
   - Email / URL Type
   - Email / URL Cat C.
3. Press Enter.
4. Choose an option for a selected record row to do one of the following:
   - Gen Text - Add text in the Address Book Email / URL text window (P0016)
   - Update - Edit the selected Email / URL record in the Email / URL Revisions screen (P01018)
   - Send / Browse email / URL - Invoke the PC email application to send to an Email selection or the PC Web browser application to browse a URL.
5. Press Enter.

Entering Address Book Email/URL Revisions

From Address Book (G01), choose **Auxiliary Address Book Info**
From Auxiliary Address Book Info (G0111), choose **Email/URL Revisions**

When a new email/URL address is being entered, it must be associated to a valid Address Book Number and Who's Who number related to the Address Book Number entered. If the Who's Who Number is left blank, the record entered will be directly associated to the primary Who's Who Number for the Address Book Number.

If an Email/URL Line number is entered and it does not exist for the Address Book, Who's Who Line, Email/URL Type and Email/URL Cat. Code (these fields are the partial key) entered, a new record will be created. If Email/URL Line number is left blank, the program will assign the next number available for the partial key entered.

An email can be sent or an URL address can be browsed from this program.

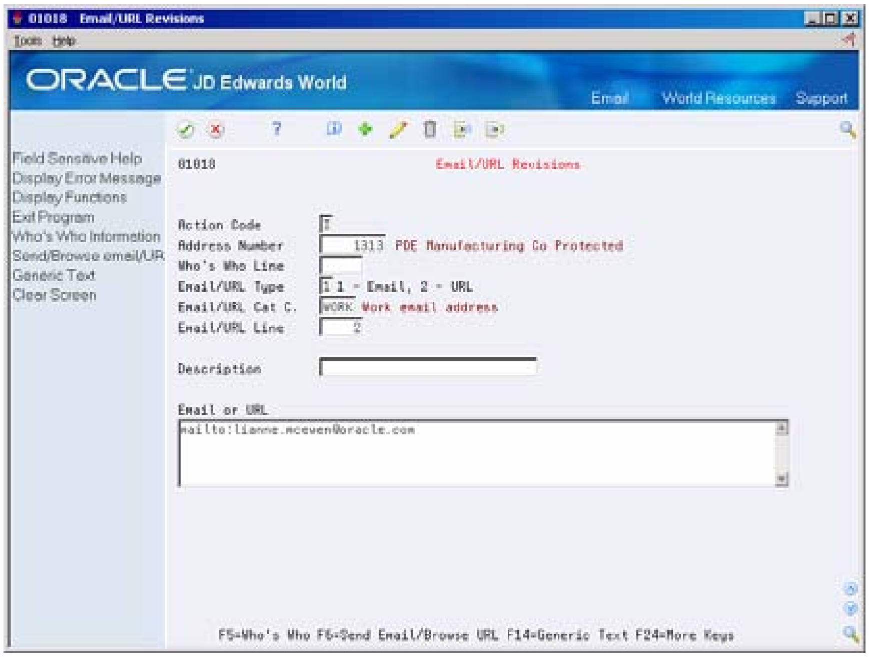
> **Note:** This feature is available if Client Access 5250 emulator is being used. Emulator Type must be setup to "1" in the User Display Pref Revisions (Hidden Selection 85).

Before You Begin

- Set up Address Book records with Who’s Who contacts
- Set up URL/Email Category Codes (01/UC)

To enter an email/URL record

On Email/URL Revisions


01018 Email/URL Revisions
Tools Help
ORACLE JD Edwards World
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
Who's Who Information
Send/Browse email/UR
Generic Text
Clear Screen

01018 Email/URL Revisions

Action Code I
Address Number 1313 PDE Manufacturing Co Protected
Who's Who Line
Email/URL Type 1 1 - Email, 2 - URL
Email/URL Cat C. WORK Work email address
Email/URL Line 2

Description

Email or URL
mailto:lianne.mcewen@oracle.com

F5=Who's Who F6=Send Email/Browse URL F14=Generic Text F24=More Keys

1. Complete the following fields:
   - Address Number
   - Who’s Who Line

- Email/URL Type
- Email/URL Cat C.
- Email/URL Line
- Description
- Email or URL

2. Press Enter.

Field	Explanation
Address Number	This is the Address Book number associated with the email/URL.
Who's Who Line	This field is used to identify the line ID number for a Who's Who record.
Email/URL Type	This flag indicates whether the address is an Email address or a URL address. Valid values include: 1 Email Address 2 URL Address
Email/URL Cat C.	This field is a user defined code (01/UC) that provides a description of the Email Address or URL Address. Valid values might include: ▪ CORP - Corporate URL address ▪ MAIN - Default address for email/URL ▪ PERS - Personal email address ▪ WORK - Work email address
Email/URL Line	This field is used to create a unique key within a file and should be used with a next number approach.
Description	This field is used to enter a user defined name or remark
Email or URL	This is the actual Email or URL address.

4 Address Book Reports and Mailing Labels

Overview to Address Book Reports and Mailing Labels

Objectives

- To review information by address and contact person (who's who)
- To check for duplicate address information
- To track changes made to your master records
- To understand the different types of mailing labels

About Address Book Reports and Mailing Labels

You can print several types of reports to verify accuracy and track any changes made to your address book information. Additionally, several types of mailing labels are available to suit your specific business requirements.

Complete the following tasks:

- Print reports by address and Who's Who
- Print the Check for Duplicates report
- Print an audit log
- Create the Address Book Reporting table
- Print mailing labels

Which Report Should You Print?

The following describes the address book reports.

Report	Description
Reports by Address	Print this report for a list of all addresses.
Reports by Who's Who	Print this report for a list of only addresses that have contact names.

Report	Description
Check for Duplicates	Print this report periodically to verify that you do not have duplicate information in the address book. Additionally, you should print this report if you have recently converted to the JD Edwards World system. The current program logic compares Alpha Name, Postal Code, and City fields to identify possible duplicate Address Book entries. Set processing option 15 (Duplicate Data Verification) in your version of Address Book Revisions (P01051) to configure duplicate checking functionality: Blank No duplicate checking 1 Hard error 2 Warning
Audit Log	Print an audit log to track who changed information for master records and when they changed it. This log shows "before" and "after" information about changes made in the Address Book, Accounts Receivable, or Accounts Payable systems.

What Are the Types of Mailing Labels?

The following types of mailing labels are available:

- Address and Who's Who labels

  Address and Who's Who labels are standard labels that print two or three across a page, depending on the type of printer you use.

- Cheshire labels

  Cheshire labels are different from standard mailing labels. They print four labels across that are 3.2 inches wide by .9 inches high. You can print a maximum of nine lines on a Cheshire label. The form size for Cheshire labels is 14-7/8 inches wide by 12 inches high. Cheshire labels are printed on a Cheshire printing machine.

- Dun & Bradstreet labels

  Dun & Bradstreet labels are the same as Cheshire labels, except that they print in the Dun & Bradstreet style.

Print Reports by Address and Who's Who

Printing Reports by Address and Who's Who

To review and verify addresses and contact names for your address book records, you can:

- Print reports by address
- Print reports by Who's Who

Each report has three versions:

Version	Description
One line for each address	Prints a condensed report with one line of detail for each address.
Full address with reporting codes and notes	Prints all address book information, except category codes 11 - 30. This report is helpful when preparing to print mailing labels.
Full address without reporting codes or notes	Prints all address book information, except category codes and notes, on 8-1/2 by 11 inch paper.

Address and who's who reports use information in the following tables:

- Address Book Master (F0101)
- Who's Who (F0111)
- Address by Date (F0116)
- Country Constants Master (F0070)

What You Should Know About

Wrong address printing on report	If you have multiple addresses for the same entity and an incorrect address prints, run Effective Address Update so that the current address prints when you rerun the report.
Multiple addresses printing on report	For some reports, an address prints multiple times, depending on how many contact names are assigned to an address.
Page breaks	Do not specify page breaks in the processing options if your system is double-byte enabled.

Printer overrides	You cannot change printer overrides for these reports. The overrides are hard-coded.
Formatting addresses	Use country constants to format your addresses according to the mailing specifications of the country.

Printing Reports by Address

From Address Book (G01), choose Periodic Processes
From Periodic Processes (G0121), choose Reports by Address

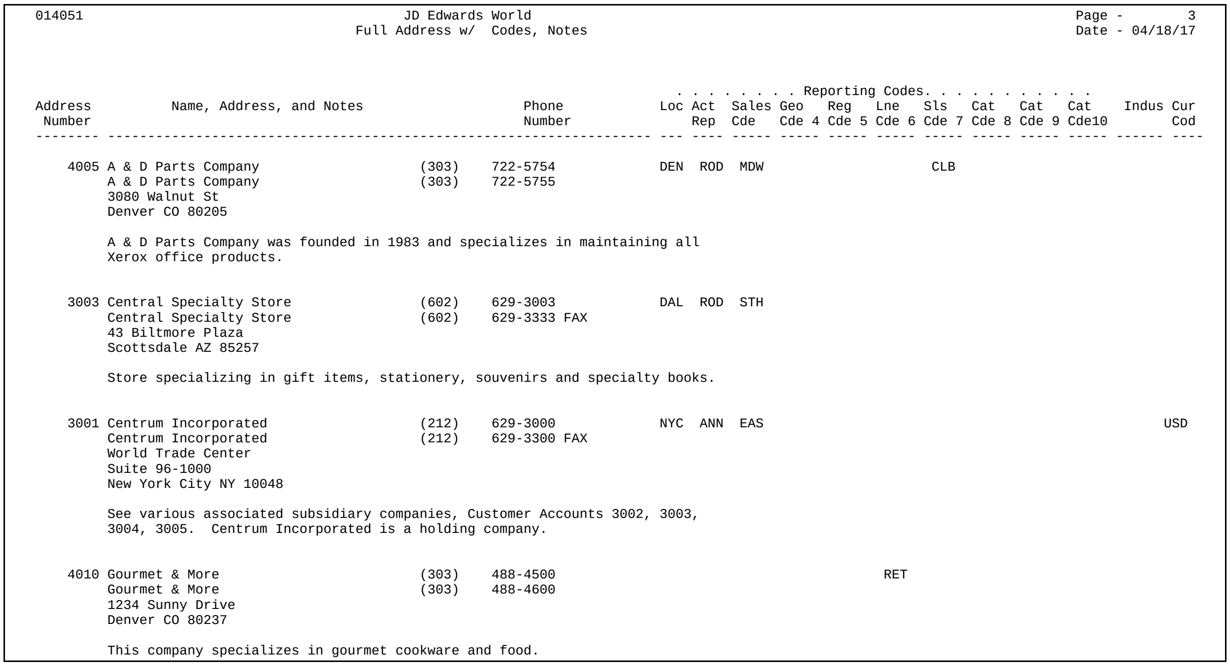
The following report samples show address information that includes:

- One line for each address
- Full address with codes and notes
- Full address without codes and notes

Report by Address - One Line per Address

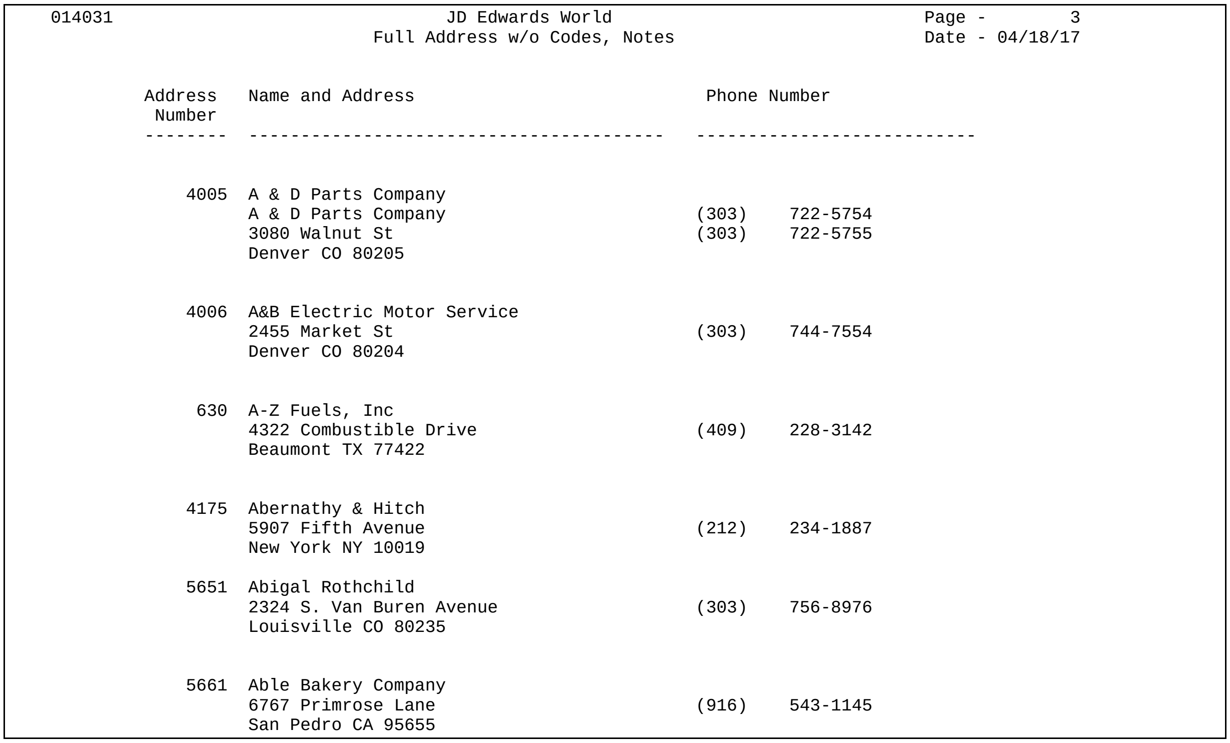
```
014021                                                      JD Edwards World                                        Page -        3
                                                          One Line per Address                                      Date - 04/18/17
Address          Name                            Phone                    Mailing Name                 Line 1                       City      ST    Postal       Country
 Number                                          Number                                                                                              Code
 ------- ----------------------------- -------------------------- ------------------------------ -------------------------------------- --- ------------ -------------
     1 A Financial/Distributio (303)            555-1100          A Model Financial/Distribution 8055 East Tufts Avenue              Denver        CO  80237         USA
    4006 A&B Electric Motor Service    (303)    744-7554          A&B Electric Motor Service     2455 Market St                      Denver        CO  80204         USA
    4175 Abernathy & Hitch             (212)    234-1887          Abernathy & Hitch              5907 Fifth Avenue                   New York      NY  10019         USA
    5661 Able Bakery Company           (916)    543-1145          Able Bakery Company            6767 Primrose Lane                  San Pedro     CA  95655         USA
    6411 Able, Robert/Helen            (303)    644-1101          Robert/Helen Able              Dublin Apts/Gateway, Unit 101       Denver        CO  80207         USA
    6373 Aqua Cascade Corporation      (303)    555-3522          Aqua Cascade Corporation       6533 Crystal St.                    Denver        CO  80212         USA
    5389 Arthur Mitchell, PC           (303)    320-1040          Arthur Mitchell, PC            Certified Public Accountants        Denver        CO  80206         USA
    6568 Avis Car Rental               (303)    270-AVIS          Avis Car Rental (Tenant)       11000 East Airport Blvd             Denver        CO  80207         USA
    6656 ABF Freight Systems           (303)    555-2795          ABF Freight Systems            4567 Navajo Blvd.                   Denver        CO  80227         USA
    2313 Baker Manufacturing, Ltd      (404)    933-6465          Baker Manufacturing, Ltd       400 Broadland Road NW               Atlanta       GA  30342         USA

      Address Total -         10
```

Report by Address - Full Address with Codes and Notes



```
 014051                                  JD Edwards World                                                                   Page -        3
                                   Full Address w/  Codes, Notes                                                           Date - 04/18/17



                                                                                  . . . . . . . . Reporting Codes. . . . . . . . . . .
 Address          Name, Address, and Notes                    Phone            Loc Act  Sales Geo   Reg   Lne   Sls   Cat   Cat   Cat    Indus Cur
  Number                                                      Number               Rep  Cde   Cde 4 Cde 5 Cde 6 Cde 7 Cde 8 Cde 9 Cde10        Cod
 -------- ------------------------------------------------------------------- --- ---- ----- ----- ----- ----- ----- ----- ----- ----- ------ ----

     4005 A & D Parts Company                   (303)    722-5754            DEN  ROD  MDW                    CLB
          A & D Parts Company                   (303)    722-5755
          3080 Walnut St
          Denver CO 80205

          A & D Parts Company was founded in 1983 and specializes in maintaining all
          Xerox office products.


     3003 Central Specialty Store               (602)    629-3003            DAL  ROD  STH
          Central Specialty Store               (602)    629-3333 FAX
          43 Biltmore Plaza
          Scottsdale AZ 85257

          Store specializing in gift items, stationery, souvenirs and specialty books.


     3001 Centrum Incorporated                  (212)    629-3000            NYC  ANN  EAS                                                   USD
          Centrum Incorporated                  (212)    629-3300 FAX
          World Trade Center
          Suite 96-1000
          New York City NY 10048

          See various associated subsidiary companies, Customer Accounts 3002, 3003,
          3004, 3005.  Centrum Incorporated is a holding company.


     4010 Gourmet & More                        (303)    488-4500                                   RET
          Gourmet & More                        (303)    488-4600
          1234 Sunny Drive
          Denver CO 80237

          This company specializes in gourmet cookware and food.
```

Report by Address - Full Address without Codes and Notes



```
 014031                          JD Edwards World                        Page -        3
                          Full Address w/o Codes, Notes                  Date - 04/18/17


          Address   Name and Address                           Phone Number
           Number
          --------  ---------------------------------------   --------------------------


              4005  A & D Parts Company
                    A & D Parts Company                       (303)    722-5754
                    3080 Walnut St                            (303)    722-5755
                    Denver CO 80205


              4006  A&B Electric Motor Service
                    2455 Market St                            (303)    744-7554
                    Denver CO 80204


               630  A-Z Fuels, Inc
                    4322 Combustible Drive                    (409)    228-3142
                    Beaumont TX 77422


              4175  Abernathy & Hitch
                    5907 Fifth Avenue                         (212)    234-1887
                    New York NY 10019

              5651  Abigal Rothchild
                    2324 S. Van Buren Avenue                  (303)    756-8976
                    Louisville CO 80235


              5661  Able Bakery Company
                    6767 Primrose Lane                        (916)    543-1145
                    San Pedro CA 95655
```

Processing Options

See Reports by Address (P01301).

Printing Reports by Who’s Who

From Address Book (G01), choose **Periodic Processes**
From Periodic Processes (G0121), choose **Reports by Person (Who's Who)**

The following report samples show address information that includes:

- One line for each address
- Full address with codes and notes
- Full address without codes and notes

Report by Who’s Who - One Line per Address

```
01402W                                                      JD Edwards World                        Page -        3
                                                          One Line Per Address                      Date - 04/18/17
                                                           State of Colorado

Address          Name                           Phone                       Mailing Name                   Line 1                       City         ST     Postal    Country
 Number                                         Number                                                                                                        Code
-------- ----------------------------- ---------------------------- ------------------------------ ----------------------------- -------------------- --- ------------ -------
   16846 Mr. Adam Bearman              (303)    488-4500            Bear Creek National Bank       1234 Bear Creek Drive         Denver               CO  80239        USA
    3001 Mr. George S. May             (212)    629-3000            Centrum Incorporated           World Trade Center            New York City        NY  10048        USA
    5003 Mr. John Loring               (303)    443-5003            Adams County                   4560 Brighton Blvd            Brighton             CO  80209        USA
    5003 Mr. John Montoya              (303)    443-5003            Adams County                   4560 Brighton Blvd            Brighton             CO  80209        USA
    3001 Mr. Robert TenBroeck          (212)    629-3000            Centrum Incorporated           World Trade Center            New York City        NY  10048        USA
    2727 Mr. Todd Amen                 (214)    555-4001            Acme Drilling Company          Attn: Red Adair               Dallas               TX  75206        USA
    2727 Ms. LaDonna Kirchner          (214)    555-4001            Acme Drilling Company          Attn: Red Adair               Dallas               TX  75206        USA
    3001 Ms. Regina DeLisi             (212)    629-3000            Centrum Incorporated           World Trade Center            New York City        NY  10048        USA
    5003 Ms. Rosalie Albertano         (303)    443-5003            Adams County                   4560 Brighton Blvd            Brighton             CO  80209        USA
   16846 Ms. Susan Beardsley           (303)    488-4500            Bear Creek National Bank       1234 Bear Creek Drive         Denver               CO  80239        USA

     Address Total -         10
```

Report by Who's Who - Full Address with Codes and Notes

```
 01405W1                          JD Edwards World                                                   Page -        4
                                 Full Address w/  Codes, Notes, & WW                                  Date - 04/18/17



Address       Name and Address                              Phone               Loc   Sales  Sales Rpt Rpt Rpt Rpt Rpt Rpt Rpt
 Number                                                     Number                    Persn   Terr  4   5   6   7   8   9  10
-------- ---------------------------------------   ----------------------------  ----- -----  ----- --- --- --- --- --- --- ---

    4005 A & D Parts Company                       (303)    722-5754              DEN     ROD   MDW             CLB
         A & D Parts Company                       (303)    722-5755
         Mr. Brian Ballard
         3080 Walnut St
         Denver CO 80205

         A & D Parts Company was founded in 1983 and specializes in maintaining all
         Xerox office products.


         Mr. Brian Ballard
         Mr. Paul O'Connor
         Ms. Melinda Merrell

    3003 Central Specialty Store                   (602)    629-3003              DAL     ROD   STH
         Central Specialty Store                   (602)    629-3333 FAX
         Mr. Hector Jimenez, Billing Supervisor
         43 Biltmore Plaza
         Scottsdale AZ 85257

         Store specializing in gift items, stationery, souveniers and specialty books.


         Mr. Hector Jimenez, Billing Supervisor

    3001 Centrum Incorporated                      (212)    629-3000              NYC     ANN   EAS
         Centrum Incorporated                      (212)    629-3300  FAX
         Mr. George S. May
         World Trade Center
         Suite 96-1000
         New York City NY 10048

         See various associated subsidiary companies, Customer Accounts 3002, 3003,
         3004, 3005.  Centrum Incorporated is a holding company.


          Mr. Jonathan Parks
          Ms. Maradith Williams
```

Report by Who's Who - without Codes and Notes

```
 01403W1                        JD Edwards World                     Page -        4
                          Full Address w/o Codes, Notes, & WW        Date - 04/18/17


           Address   Name and Address                        Phone Number
            Number
           --------  ----------------------------------------  ---------------------------

               4950  Fashion Mall
                     The Fashion Mall                          (303)    320-2950
                     2950 East University Blvd
                     Denver CO 80206

               5001  University Center
                     University Center                         (303)    320-2520
                     Stanford Office Center, #200
                     2520 East Belleview Blvd
                     Englewood CO 80111

               5055  The Stanford Office Center
                     The Stanford Office Center                (303)    320-2520
                     University Office Park
                     2520 Rockford Avenue
                     Dallas TX 75094

               5081  Dublin Tower
                     Dublin Tower                              (303)    320-2503
                     2500 East Darmouth
                     Green Valley AZ 40489

               5101  The Fashion Center
                     The Fashion Center                        (303)    320-2951
                     2950 East Arapahoe Avenue
                     Denver CO 80206
```

Processing Options

See One Line per Address – Who's Who (P01402W).

Print the Check for Duplicates Report

Printing the Check for Duplicates Report

From Address Book (G01), choose **Periodic Processes**
From Periodic Processes (G0121), choose **Check for Duplicates**

To verify that you do not have duplicate information in the address book, print the Check for Duplicates report. If you have recently converted to the JD Edwards World system, you should print this report to verify that you did not create duplicate records during the initial setup of your system. After reviewing this report, delete or inactivate duplicate address book records.

With this report, you can print duplicate information for alpha names only or alpha names and one of the following:

- Postal codes
- Phone numbers
- Postal codes and phone numbers
- Who's who

This DREAM Writer report is based on a join table (F0101JD) that combines the following:

- Address Book Master (F0101)
- Address by Date (F0116)
- Phone Number Master (F0115)

Before You Begin

- If you use effective dates, run the Effective Address Update report to ensure that the most current addresses print on your report

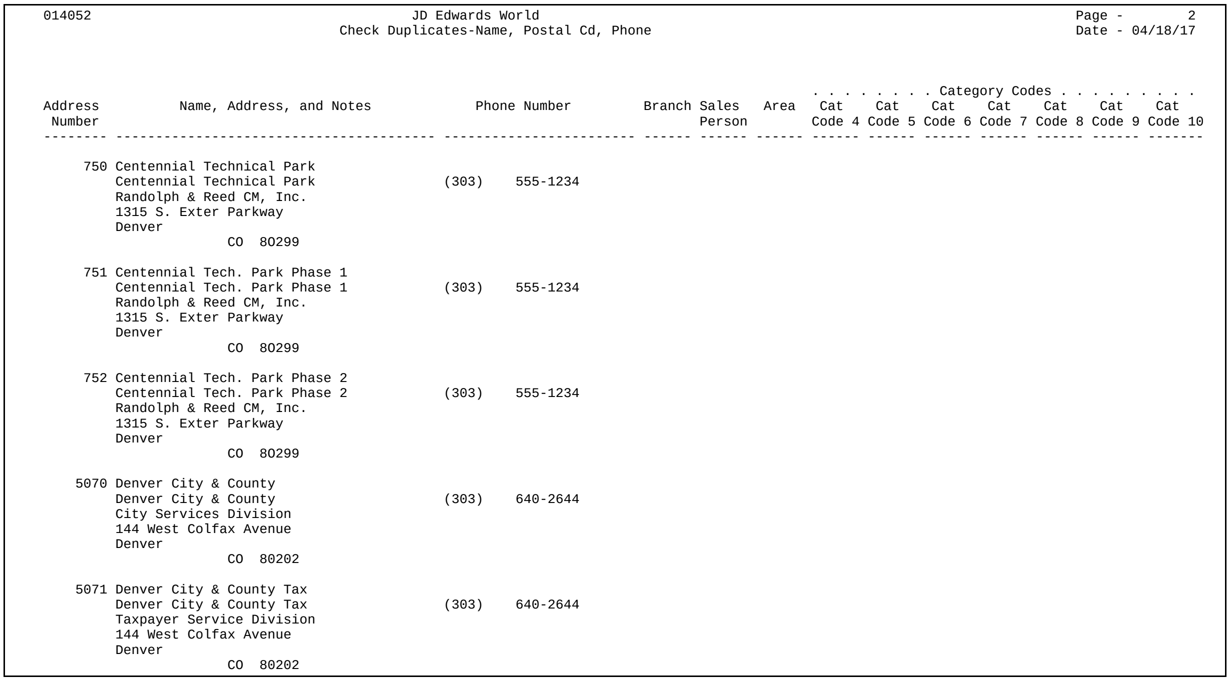
What You Should Know About

Deleting address book records	If you delete an address book record, the system deletes information from the Address Book Master table (F0101) and all related data, such as phone number and customer/supplier master information. You cannot delete address book records that have transaction details or master information existing in files throughout the system. This step is taken to maintain data integrity wherever an address number is used for data access.

Controlling page breaks on the report

You control page breaks by the Location of the Page Overflow field in the printer overrides. To ensure that no page break occurs in the middle of an address, verify that this field is not larger than the setting in the Demo versions. For example, for eight characters per inch, the overflow field should be 54 to allow six lines of margin for a full address.

Check for Duplicates Report



```
014052                                        JD Edwards World                                                                   Page -        2
                                     Check Duplicates-Name, Postal Cd, Phone                                                     Date - 04/18/17



                                                                                                . . . . . . . . Category Codes . . . . . . . . .
Address          Name, Address, and Notes             Phone Number         Branch Sales   Area   Cat    Cat    Cat    Cat    Cat    Cat    Cat
 Number                                                                                  Person         Code 4 Code 5 Code 6 Code 7 Code 8 Code 9 Code 10
-------- ---------------------------------------- ------------------------ ------ ------ ------ ------ ------ ------ ------ ------ ------ -------

     750 Centennial Technical Park
         Centennial Technical Park                (303)    555-1234
         Randolph & Reed CM, Inc.
         1315 S. Exter Parkway
         Denver
                       CO  80299

     751 Centennial Tech. Park Phase 1
         Centennial Tech. Park Phase 1            (303)    555-1234
         Randolph & Reed CM, Inc.
         1315 S. Exter Parkway
         Denver
                       CO  80299

     752 Centennial Tech. Park Phase 2
         Centennial Tech. Park Phase 2            (303)    555-1234
         Randolph & Reed CM, Inc.
         1315 S. Exter Parkway
         Denver
                       CO  80299

    5070 Denver City & County
         Denver City & County                     (303)    640-2644
         City Services Division
         144 West Colfax Avenue
         Denver
                       CO  80202

    5071 Denver City & County Tax
         Denver City & County Tax                 (303)    640-2644
         Taxpayer Service Division
         144 West Colfax Avenue
         Denver
                       CO  80202
```

Processing Options

See Check Duplicates – Name, Postal Code, Phone (P014052).

Print an Audit Log

Printing an Audit Log

From Address Book (G01), choose **Periodic Processes**
From Periodic Processes (G0121), choose **Audit Log**

You can track who changed address book information and when they changed it by printing an audit log. The audit log shows "before" and "after" information regarding changes made to the following tables:

- Address Book Master (F0101)
- Who's Who – Mailing Name (F0111)
- Customer Master (F0301)
- Supplier Master (F0401)

The system does not automatically record changes and deletions that are made to the address book. All additions and deletions are recorded to the audit log when the processing option is activated for Address Book Revisions (P01051).

Additionally, the following audit log reports are available if you activate the Audit Log:

- Address Book Updates
- Customer/Supplier Master Information Updates
- Category Code Updates

Information is stored in the Address Book Master Audit Log table (F0101A). To generate and print an audit log, this table must be in the same library as the Address Book Master table.

Before You Begin

Set the appropriate processing option for:

- Address Book Revisions
- Supplier Master Information
- Customer Master Information

What You Should Know About

DREAM Writer data selection	If there are no records selected by the DREAM Writer, you will get a report with the message 'No Records Selected' as well as a job log. You must review the data selection to confirm that the selection criteria are valid.

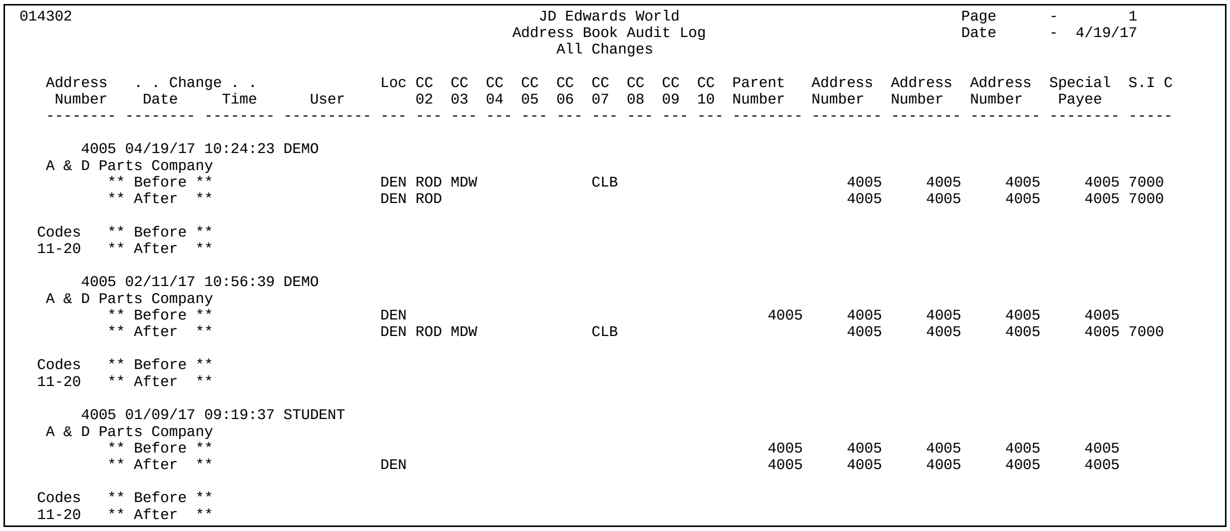
Address Book Updates

```
  014303                                                 JD Edwards World                                   Page      -        1
                                                       Address Book Audit Log                               Date      -  9/18/17
                                                            All Changes
                                           . . Accts Payable . .                    . . . . Accounts Receivable . . . . . . . . . .  . . . . . . .
Address   . . Change . .              Cr  G/L         Tax          P Pmt M Flt  A/R  P C Pmt F  Percent         Credit         Last Crd  ABC  B Cur Tx
 Number    Date     Time      User    Ms Clas          ID          C Trm P Day  Clas S P Trm C   Factor         Limit          Rev Date       O Cod Ex
-------- -------- -------- ---------- -- ---- -------------------- - --- - ---  ---- - - --- - ---------- -------------------- -- ------ ----- - --- --
      10 07/07/17 13:37:20 PE5989911
A * D Parts Cmpoany
       ** Before **                           125610118                  N
       ** After  **                           125610118                  N
A * D Parts Company
   64100 06/08/17 14:08:02 DB9046849
SBC - Sociedade Brasileira de Computação
       ** Before **                           54689621214545645622 3 N   N           Y C N   N                              51           C C C   BRL V
       ** After  **                           54689621214545645622 3 N   N           Y C N   N                              51           C C C   BRL V
   64100 06/08/17 08:21:22 DB9046849                                                                                                     C C C   BRL V
SBC - Sociedade Brasileira de Computação                                                                                                 C C C   BRL V
```

Customer/Supplier Master Information Updates

```
  014303                                                 JD Edwards World                                   Page      -        1
                                                       Address Book Audit Log                               Date      -  4/19/17
                                                            All Changes

                                           . . Accts Payable . .                    . . . . Accounts Receivable . . . . . . . . . . . . . . . .
Address   . . Change . .              Cr  G/L         Tax          P Pmt M Flt  A/R  P C Pmt F  Percent         Credit         Last Crd  ABC  B Cur Tx
 Number    Date     Time      User    Ms Clas          ID          C Trm P Day  Clas S P Trm C   Factor         Limit          Rev Date       O Cod Ex
-------- -------- -------- ---------- -- ---- -------------------- - --- - ---  ---- - - --- - ---------- -------------------- -------- ----- - --- --

    4005 04/19/17 10:25:13 DEMO
A & D Parts Company
       ** Before **                      4110 885965545            C     N
       ** After  **                      4110 885965545            C   1 N

    4005 06/11/17 10:59:13 DEMO
A & D Parts Company
       ** Before **                                                  1   N           Y C     N                                           C C C
       ** After  **                      4110 885965545            C     N

    4005 08/30/17 11:51:04 DEMO
A & D Parts Company
       ** Before **                                                      N           Y C     N                                           C C C
       ** After  **                                                  1   N           Y C     N                                           C C C
```

Category Code Updates



```
014302                                                     JD Edwards World                                Page      -        1
                                                        Address Book Audit Log                             Date      -  4/19/17
                                                             All Changes

   Address   . . Change . .              Loc CC  CC  CC  CC  CC  CC  CC  CC  CC  Parent   Address  Address  Address  Special  S.I C
    Number    Date     Time      User        02  03  04  05  06  07  08  09  10  Number   Number   Number   Number    Payee
   -------- -------- -------- ---------- --- --- --- --- --- --- --- --- --- --- -------- -------- -------- -------- -------- -----

       4005 04/19/17 10:24:23 DEMO
   A & D Parts Company
          ** Before **                   DEN ROD MDW             CLB                          4005     4005     4005     4005 7000
          ** After  **                   DEN ROD                                              4005     4005     4005     4005 7000

  Codes   ** Before **
  11-20   ** After  **

       4005 02/11/17 10:56:39 DEMO
   A & D Parts Company
          ** Before **                   DEN                                         4005     4005     4005     4005     4005
          ** After  **                   DEN ROD MDW             CLB                          4005     4005     4005     4005 7000

  Codes   ** Before **
  11-20   ** After  **

       4005 01/09/17 09:19:37 STUDENT
   A & D Parts Company
          ** Before **                                                               4005     4005     4005     4005     4005
          ** After  **                   DEN                                         4005     4005     4005     4005     4005

  Codes   ** Before **
  11-20   ** After  **
```

Processing Options

See Print Audit Log (P01430).

Print Mailing Labels

Printing Mailing Labels

The Address Book system provides several types of mailing labels to suit your specific business needs. You can print mailing labels which include name and address information. The following labels include additional formats:

Format	Description
Address and who's who	▪ Bulk mailings (USA only) ▪ Address book number and phone number ▪ Address book number ▪ Phone number ▪ Contact person (who's who labels only)
Cheshire or Dun & Bradstreet	▪ Address number ▪ Phone number ▪ Address and phone numbers ▪ Labels with memo (Cheshire labels only)

Before You Begin

- Enter all your addresses and who's who information
- If you use effective dates, run the Effective Address Update to ensure that the most current addresses print on your labels
- Print Report by Address - with Codes and Notes to verify your address book information is accurate
- Load the labels in your printer

What You Should Know About

Label formats for countries	Labels print in the format specified for the country. If a country is not set up in Country Constants, the labels print with the default country format.

Printing Address and Who’s Who Labels

From Address Book (G01), choose **Periodic Processes**
From Periodic Processes (G0121), choose **Reports by Address** or **Reports by Person (Who's Who)**

One of the versions for Reports by Address and Reports by Who’s Who is for mailing labels. The following reports show examples of the types of mailing labels you can print.

Mailing Labels by Address

```
A & D Parts Company                 A&B Electric Motor Service          Ms. Dominique Abbot
3080 Walnut St                      2455 Market St                      1407 W. Chenango
Denver CO 80205                     Denver CO 80204                     Englewood CO 80110
```

Mailing Labels by Who’s Who

```
A & D Parts Company                 A & D Parts Company                 A & D Parts Company
Mr. Brian Ballard                   Mr. Paul O’Connor                   Ms. Melinda Merrell
3080 Walnut St                      3080 Walnut St                      3080 Walnut St
Denver CO 80205                     Denver CO 80205                     Denver CO 80205
```

Mailing labels are standard labels that print two or three across a page, depending on the type of printer:

Printer	**Description**
Dot Matrix printers	Use Data Documents labels, #35023-3, 3-1/2 by 1-7/16 inch, to print three labels across. You can specify: ▪ Ten characters per inch to print 32-character labels ▪ Fifteen characters per inch to print 40-character labels
Laser printers	Use Avery Laser Printer labels, #5163, 2 by 4 inch, to print two labels across.

Printing Cheshire Labels

From Address Book (G01), choose **Periodic Processes**
From Periodic Processes (G0121), choose **Print Cheshire Labels**

Cheshire labels print four labels across that are 3.2 inches wide by .9 inches high. You can print a maximum of nine lines on a Cheshire label page. The form size for Cheshire labels is 14-7/8 inches wide by 12 inches high. Cheshire labels are printed on a Cheshire printing machine.

```
A & D Parts Company             A & D Parts Company               A & D Parts Company               A & D Parts Company
Mr. Brian Ballard               Mr. Paul O’Connor                 Ms Melinda Merrell                Ms Sandra Stemple
3080 Walnut St                  3080 Walnut St                    3080 Walnut St                    3080 Walnut St
Denver CO 80205                 Denver CO 80205                   Denver CO 80205                   Denver CO 80205
```

Printing Dun & Bradstreet Labels

From Address Book (G01), choose **Periodic Processes**
From Periodic Processes (G0121), choose **Print Dun/Bradstreet Labels**

Dun & Bradstreet labels are the same as Cheshire labels, except that they print in the Dun & Bradstreet style.

```
A & D Parts Company      A-Z Fuels, Inc              Ms Dominique Abbot              Abernathy & Hitch
3020 Walnut St           4322 Combustible Drive      1407 W. Chenango                5907 Fifth Avenue
Denver CO 80205          Beaumont TX 77422           Englewood CO 80110              New York NY 10019
```

Processing Options

See Mailing Labels Print – Who's Who (P01401W).

See Cheshire Labels (P01401C).

See Cheshire Labels - Dun / Bradstreet (P01401C1).

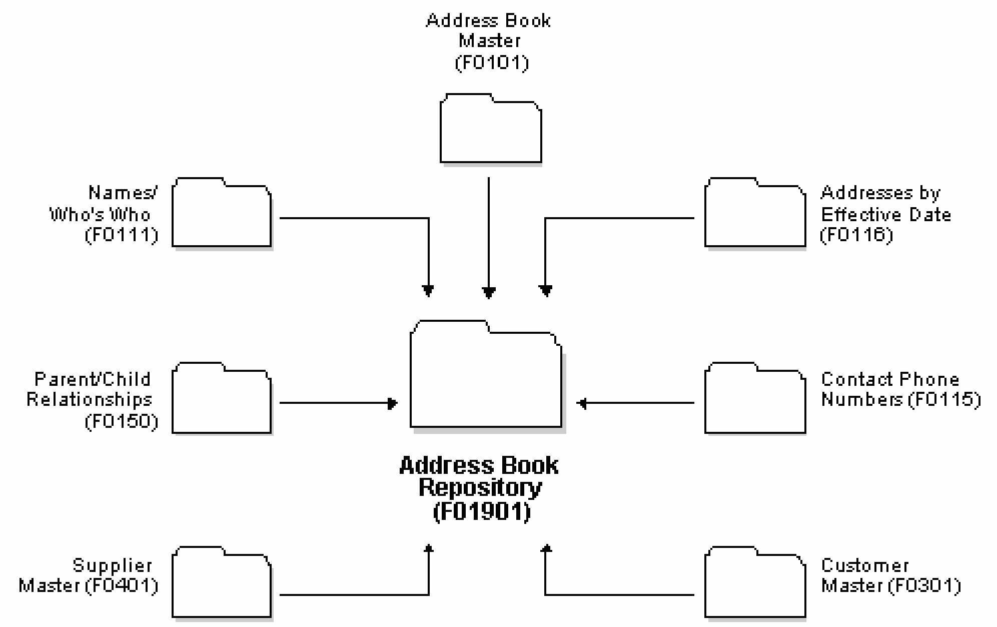
Create the Address Book Reporting Table

Creating the Address Book Reporting Table

From Address Book (G01), enter 27
From A/B Advanced & Technical Operations (G0131), choose **Build A/B Reporting File**

To create custom reports using World Writer or a third-party report writer, you can create a reporting table that is based on the seven address book tables. By extracting information from these tables and creating the Address Book Repository table (F01901), reporting on address book information is simpler and more flexible.

When you create the Address Book Repository table for address book reports, the system gathers information from the following:


Address Book Master (F0101)
Names/ Who's Who (F0111)
Addresses by Effective Date (F0116)
Parent/Child Relationships (F0150)
Contact Phone Numbers (F0115)
Address Book Repository (F01901)
Supplier Master (F0401)
Customer Master (F0301)

The structure of the table allows for only one record for each address book number. As a result, some of the one-to-many relationships are lost when you create the table. For example, the table includes only one address and two phone numbers for each address book number.

Processing Options

See Build Address Book Reporting File (P01901).

Data Selection for Build Address Book Reporting File

If you intend to select most address book records, JD Edwards World recommends that you select all of them for faster processing.

5 System Setup

Overview to System Setup

Objectives

- To set up the controls that let you process address book information

About Address Book System Setup

Before you use the Address Book system, you need to define certain information that the system will use during processing. The information that you define customizes the system for your business needs. For example, you might set up codes to group and report on economic activity in business areas, such as agricultural services, mining, and so on.

System setup for address book consists of:

- Setting up constants for address book
- Setting up country constants for address book
- Setting up postal codes for address book
- Understanding user defined codes
- Understanding user defined codes for address book
- Working with user defined codes
- Setting up category codes for address book
- Setting up next numbers for address book
- Setting up consolidation codes

The following describes the Address Book setup features:

Feature	Description
Constants	Establish system basics, such as: ▪ The address book number format that the system uses as the default value when searching for records ▪ Whether you require electronic mail (e-mail) security to restrict users from viewing other user's messages ▪ Whether you want to define special mailing formats for specific countries ▪ Whether you want to maintain multiple addresses for one address book entity
Postal codes	Define customized codes to speed your data entry of mailing addresses.
User defined codes	Define customized codes, such as search types, that are appropriate for your business needs.
Category codes	Define customized codes to organize various types of address book information, such as who's who information.
Next numbers	Establish an automatic numbering system for address book records.
Consolidation code	Group-associated Address Book numbers used to report on group financial data.

Set Up Constants for Address Book

Setting Up Constants for Address Book

From Address Book (G01), enter 29
From Address Book Setup (G0141), choose Address Book Constants

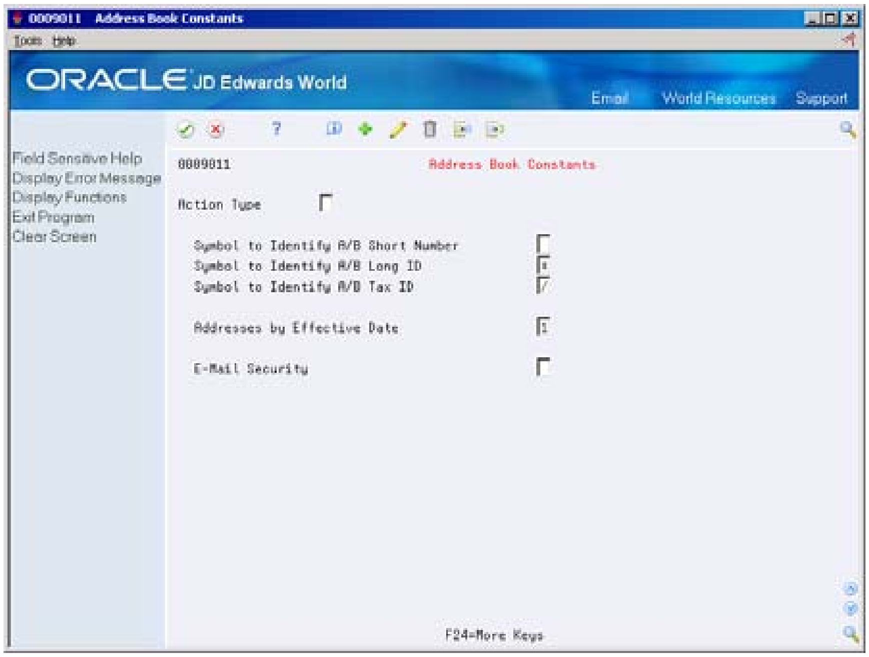
Constants provide a basic framework for how the Address Book system works, based on your business needs. Generally, one person sets up constants. JD Edwards World recommends that you do not change constants after they have been set up because this might produce unpredictable results.

Setting up address book constants consists of:

- Defining the format of the address book number
- Activating effective dates
- Activating electronic mail security

Before You Begin

- Ensure that only authorized personnel can access and change address book constants


0009011 Address Book Constants
Tools Help
ORACLE JD Edwards World
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
Clear Screen
F24=More Keys

0009011 Address Book Constants

Action Type

Symbol to Identify A/B Short Number
Symbol to Identify A/B Long ID *
Symbol to Identify A/B Tax ID /

Addresses by Effective Date 1

E-Mail Security

To define the format of the address book number

To determine how the system searches for address book numbers, you choose a format for the number. The formats are as follows:

- Short Address ID. This is a numeric, eight-character number. Next numbers usually assigns this number.
- Long Address ID. This is a free-form, 20-character number. You can use alpha, alphanumeric, or numeric characters for this number.
- Tax ID. This might be a social security number, federal or state tax ID, sales tax number, and so on.

On Address Book Constants

1. To choose a default format, leave one of the following fields blank:
    - Symbol to Identify A/B Short Number
    - Symbol to Identify A/B Long ID
2. To choose an alternate format, complete one or more of the following fields (that you have not already designated as the default):
    - Symbol to Identify A/B Short Number
    - Symbol to Identify A/B Long ID
    - Symbol to Identify A/B Tax ID

Field	**Explanation**
Symbol to Identify A/B Short Number	A code to designate that the Address Book Short Number is being entered.
Symbol to Identify A/B Long ID	A code to designate that the Address Book Alternate Key is being entered.
Symbol to Identify A/B Tax ID	A code to indicate that the Address Book Tax ID is being entered.

To activate effective dates

To maintain multiple addresses for the same entity, you might want to activate the effective date constant. This is helpful if a person or company moves to another address on a given date. You can send correspondence, billing payments, or other pertinent information to the most current address.

If you activate this feature, the effective date appears when you enter address book records. The addresses are stored in the Address by Date table (F0116).

On Address Book Constants

Complete the following field:

- Address by Effective Date

Field	Explanation
Addresses by Effective Date	This field is used to indicate whether you are using the feature of multiple addresses by Effective Date for an Address Book entity. *Form-specific information* This determines if multiple addresses are maintained for the same entity. 0 Do not use the multiple address feature. 1 Use the multiple address feature. If you leave this field blank, the system uses 0.

To activate electronic mail security

To restrict users from viewing other users' electronic mail (e-mail) messages, set up e-mail security.

On Address Book Constants

Complete the following field:

- E-Mail Security

Field	Explanation
E-Mail Security	This code determines if E-Mail security is active. 0 No, do not restrict users from viewing others E-Mail messages. 1 Yes, restrict users from viewing others E-Mail messages.

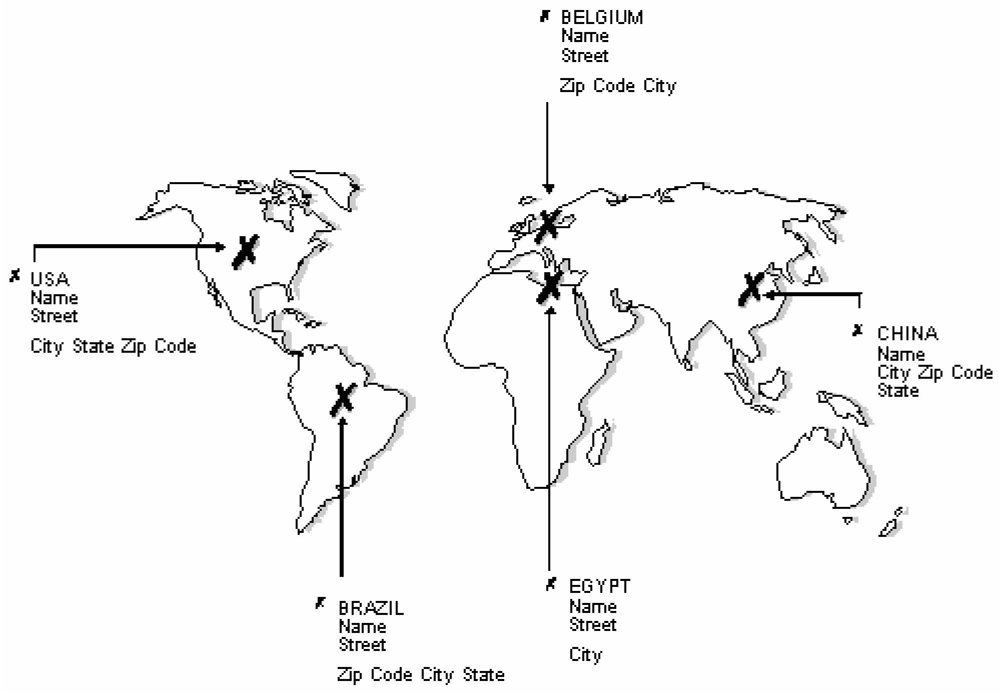
Set Up Country Constants for Address Book

Setting Up Country Constants for Address Book

	From Address Book (G01), enter 29 From Address Book Setup (G0141), choose **Country Constants Revisions**

Each country has different requirements for mailing addresses. If you do business in several countries, you might need to specify formats for each country. To control the placement of this information on reports and labels for a specific country, set up a country constant.

There are predefined mailing formats available to help you quickly set up country constants. In addition to the mailing address format, you can specify the use of a postal code, standard salutation, and attention line.



BELGIUM
Name
Street
Zip Code City
USA
Name
Street
City State Zip Code
CHINA
Name
City Zip Code
State
BRAZIL
Name
Street
Zip Code City State
EGYPT
Name
Street
City

What Are the Predefined Mailing Formats?

The following describes the predefined mailing formats:

Format	Description
Format 01	▪ Mailing Name ▪ Address Block ▪ Postal Code / City ▪ Country
Format 02	▪ Mailing Name ▪ Address Block ▪ City ▪ State ▪ Postal Code ▪ Country
Format 03	▪ Mailing Name ▪ Address Block ▪ City / Postal Code ▪ State ▪ Country
Format 04	▪ Mailing Name ▪ Address Block ▪ City / State / Postal Code ▪ Country
Format 05	▪ Mailing Name ▪ Address Block ▪ City ▪ State ▪ Country
Format 06	▪ Mailing Name ▪ Address Block ▪ Postal Code / State / City ▪ Country
Format 07	▪ Mailing Name ▪ Address Block ▪ City ▪ Country

Format	Description
Format 08	▪ Mailing Name ▪ Address Block ▪ Postal Code / City / State ▪ Country
Format 09	▪ Mailing Name ▪ Address Block ▪ City / State ▪ Postal Code
Format 10	▪ Mailing Name ▪ Address Block ▪ City / Postal Code ▪ Country
Format 11	▪ Mailing Name ▪ Postal Code / City ▪ Address Block ▪ Country
Format 12	▪ Mailing Name ▪ Address Block ▪ City / State ▪ Postal Code ▪ Country
Format 13	▪ Postal Code ▪ Mailing Name ▪ Address Block ▪ Country
Format 14	▪ Mailing Name ▪ Address Block ▪ City ▪ County ▪ Postal Code ▪ Country
Format 15	▪ Postal Code ▪ Address Block ▪ Mailing Name ▪ Country

Format	Description
Format 16	- Mailing Name - Address Block - Postal Code/City - Country
Format 17	- Mailing Name - Address Block - Postal Code - Country
Format 18	- Mailing Name - Address Block - City - Postal Code/Country
Format 19	- Mailing Name - Address Block - City - Country - Postal Code
Format 20	- Mailing Name - Address Block - City/Postal Code/Country
Format 21	- Country
Format 22	- Postal Code/City - Address Block - Mailing Name - Mailing Name - Address Block - Country

This information is stored in the Country Constants Master table (F0070).

Before You Begin

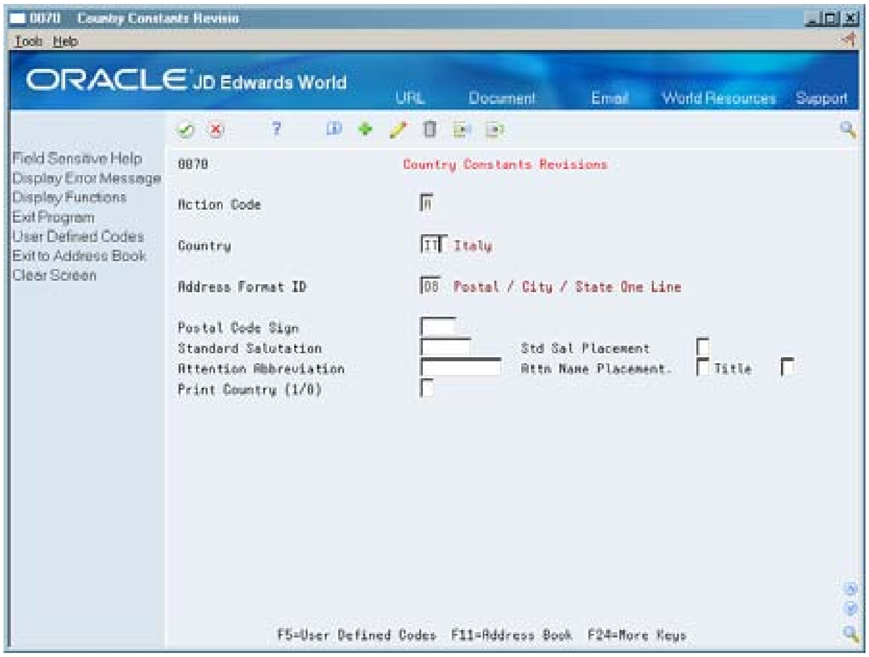
- Set up the country's value on the user defined codes list 00/CN
- Verify that the country code does not have an address format already set up
- Ensure that only authorized people can access and change the country constants

See Also

- *Working with User-Defined Codes (P00051)*

To set up country constants

On Country Constants Revisions


0070 Country Constants Revisio
Tools Help
ORACLE JD Edwards World
URL
Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
User Defined Codes
Exit to Address Book
Clear Screen

0070 Country Constants Revisions

Action Code A

Country IT Italy

Address Format ID 08 Postal / City / State One Line

Postal Code Sign

Standard Salutation

Std Sal Placement

Attention Abbreviation

Attn Name Placement.

Title

Print Country (1/0)

F5=User Defined Codes F11=Address Book F24=More Keys

1. Complete the following fields:
   - Country
   - Address Format ID
2. Complete the following optional fields:
   - Postal Code Sign
   - Standard Salutation
   - Standard Salutation Placement
   - Attention Abbreviation
   - Attention Name Placement
   - Title
   - Print Country

3. Press Enter

Field	Explanation
Country	A user defined code system 00, type CN, which identifies the country. The country code is used in the Address Book system for data selection and address formatting. It has no affect on currency conversion.
Address Format ID	A code that indicates how an address will appear on documents, reports, and mailing labels. *Form-specific information* These are hard coded formats. The valid values are on UDC 00/AF.
Postal Code Sign	The Japanese Postal System requires the Postal Code Sign. A standard postal code sign must precede the Postal Code Sign. The standard postal code sign and Postal Code Sign are required to appear on the first line of an address.
Standard Salutation	The Standard Salutation is a code used to indicate a personal salutation in an address.
Standard Salutation Placement	The Standard Salutation Placement field indicates where the salutation should appear with the name. Blank means the Standard Salutation will appear before the name 0 means the Standard Salutation will appear before the name 1 means the Standard Salutation will appear after the name 2 means the Standard Salutation will appear: a. - At the end of the last non-blank address line if no attention name exists. b. - At the end of the attention name if one exists.
Attention Abbreviation	A field that tells the system how you want the word “Attention” abbreviated on mailing labels.
Attn Name Placement	A code that indicates where the attention name line should appear in the formatted mailing address. Valid codes are: 0 Insert attention line after Address Line 1. 1 Insert attention line after Address Line 2. 2 Insert attention line after last non-blank address line. If you leave this field blank, the system uses 0.

Field	Explanation
Title	This code will control where the title of the Who’s Who attention name is placed when printing an address. 0 Place the title after the Who’s Who attention name. 1 Place the title before the Who’s Who attention name. If you leave this field blank, the system uses 0.
Print Country (1/0)	A flag to designate the printing of Country Code on Mailing Addresses. Allowed Values: 0 Do not print Country Code. (Default) 1 Print Country Code. When blank the system uses 0.

Set Up Postal Codes for Address Book

Setting Up Postal Codes for Address Book

From Address Book (G01), enter 29
From Address Book Setup (G0141), choose **Postal Code Revisions**

If you have many address book records to enter, you can speed your data entry by setting up postal codes. After you do this, you no longer have to enter certain information when you enter an address book record. You simply enter the postal code, and the system enters the city, state, and country for you.

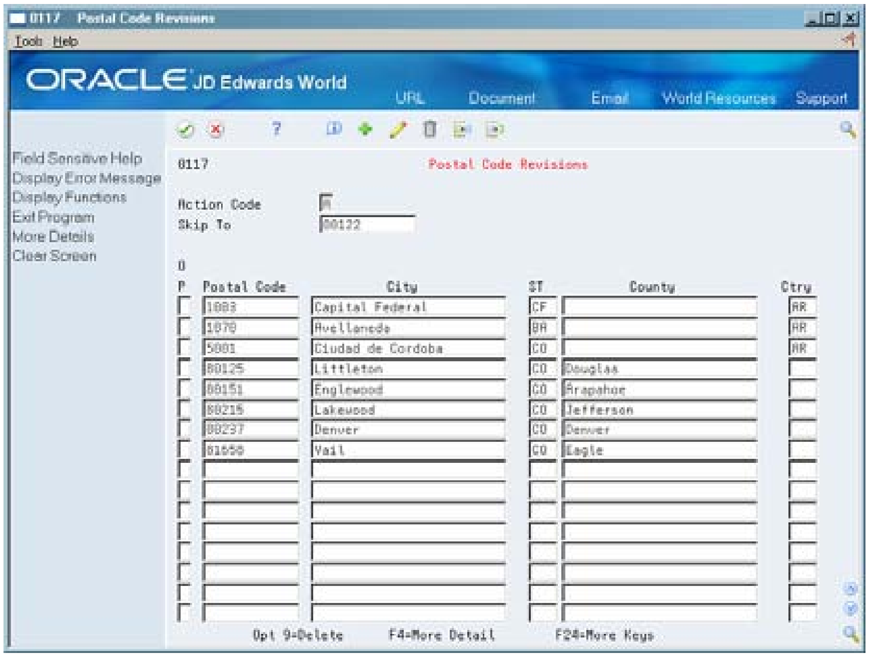
Rather than manually entering zip code information, JD Edwards World recommends that you obtain a tape from the U.S. Postal Service called *Zip Code Revisions*. You can then use the Universal File Converter program to upload zip code information to the JD Edwards World Postal Code Transactions table (F0117), which is where postal code information is stored.

Before You Begin

- Determine whether you use singular postal codes (United States) or postal code ranges (European countries)

To set up postal codes

On Postal Code Revisions


0117 Postal Code Revisions
Tools Help
ORACLE JD Edwards World
URL
Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
More Details
Clear Screen

0117 Postal Code Revisions

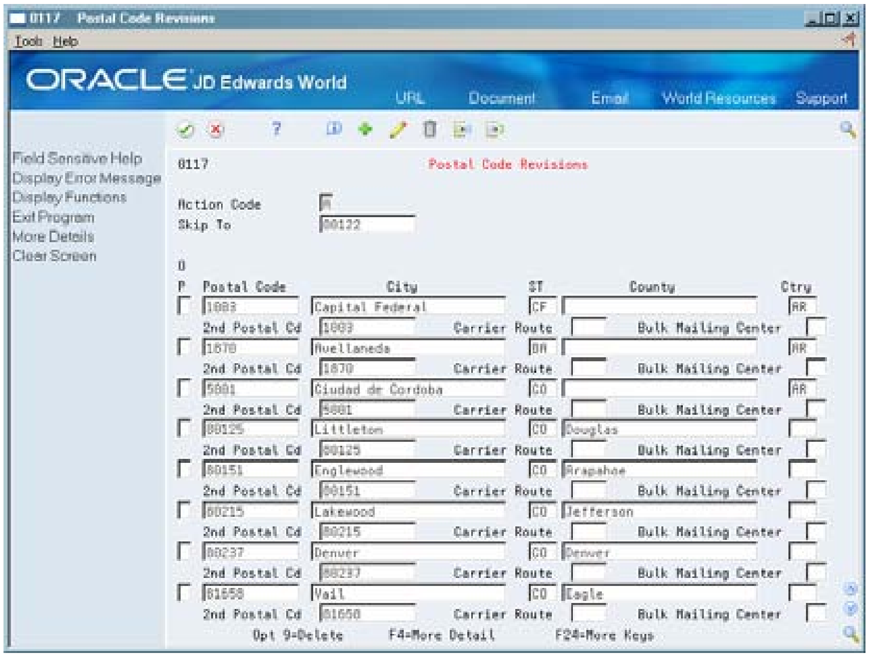
Action Code A

Skip To 80122

O P	Postal Code	City	ST	County	Ctry
☐	1083	Capital Federal	CF		AR
☐	1870	Avellaneda	BA		AR
☐	5001	Ciudad de Cordoba	CO		AR
☐	80125	Littleton	CO	Douglas	
☐	80151	Englewood	CO	Arapahoe	
☐	80215	Lakewood	CO	Jefferson	
☐	80237	Denver	CO	Denver	
☐	81658	Vail	CO	Eagle	

Opt 9=Delete F4=More Detail F24=More Keys

1. Complete the following fields:
   - Postal Code
   - City
2. Complete the following optional fields:
   - State
   - County
   - Country
3. If you use a postal code range, access the detail area.


0117 Postal Code Revisions
Tools Help
ORACLE JD Edwards World
URL
Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
More Details
Clear Screen
Opt 9=Delete
F4=More Detail
F24=More Keys

0117 Postal Code Revisions

Action Code
Skip To 80122

O P	Postal Code	City	ST	County	Ctry
☐	1083	Capital Federal	CF		AR
	2nd Postal Cd 1083	Carrier Route		Bulk Mailing Center	
☐	1870	Avellaneda	BA		AR
	2nd Postal Cd 1870	Carrier Route		Bulk Mailing Center	
☐	5001	Ciudad de Cordoba	CO		AR
	2nd Postal Cd 5001	Carrier Route		Bulk Mailing Center	
☐	80125	Littleton	CO	Douglas	
	2nd Postal Cd 80125	Carrier Route		Bulk Mailing Center	
☐	80151	Englewood	CO	Arapahoe	
	2nd Postal Cd 80151	Carrier Route		Bulk Mailing Center	
☐	80215	Lakewood	CO	Jefferson	
	2nd Postal Cd 80215	Carrier Route		Bulk Mailing Center	
☐	80237	Denver	CO	Denver	
	2nd Postal Cd 80237	Carrier Route		Bulk Mailing Center	
☐	81658	Vail	CO	Eagle	
	2nd Postal Cd 81658	Carrier Route		Bulk Mailing Center	

4. Complete the following field:

- Second Postal Code

5. Press Enter.

Field	Explanation
2nd Postal Cd	The postal code attached to an address for delivery in any country. This code is used as the high end value when doing Postal Code Transaction range processing. *Form-specific information* If you leave this field blank, the system enters the value you entered in the Postal Code field.

What You Should Know About

Overriding postal code information	You can override the postal code or city information on Address Book Revisions. The system does not use information in the Postal Code Revisions table to verify the validity of a postal code or city.
Multiple counties per postal code	There are instances where a postal code applies to one city–yet multiple counties. In these instances, you must designate the county as the unique key to differentiate each postal code entry. This will allow you to enter the same postal code more than once for the same city.

Understand User-Defined Codes

About User-Defined Codes

Many fields throughout the JD Edwards World systems accept only user-defined codes. When you enter an invoice, for example, you must enter a user-defined code to specify its current payment status. The system does not accept user-defined codes that are not defined in a user-defined list.

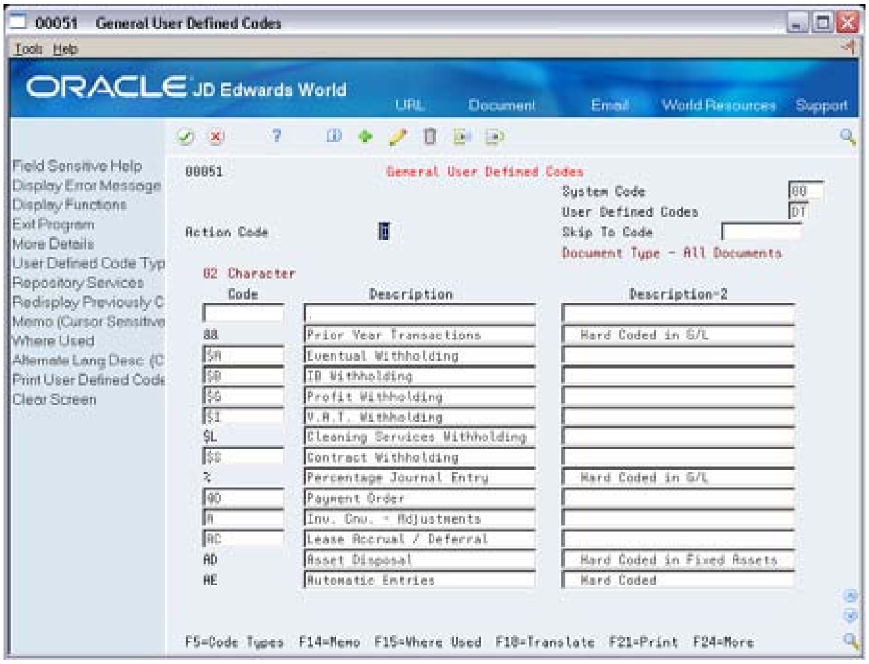
Each user-defined code is either soft-coded or hard-coded. You can customize any soft-coded user-defined code to accommodate your specific business needs. You can set up additional codes that are soft-coded as well. You cannot customize a user-defined code that is hard-coded.

User-defined code types are identified by the system code and the user-defined code list. For example, 00 / DT represents system 00 and user-defined code list DT (document types).

Information about user-defined codes is stored in the User-Defined Codes table (F0005).

Elements of a User-Defined Code Form

The User Defined Code Revisions screen shows the various codes that are assigned to a specific user-defined code, such as search types (01 / ST).


00051 General User Defined Codes
Tools Help
ORACLE JD Edwards World
URL
Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
More Details
User Defined Code Typ
Repository Services
Redisplay Previously C
Memo (Cursor Sensitive
Where Used
Alternate Lang Desc (C
Print User Defined Code
Clear Screen

00051 General User Defined Codes

System Code 00

User Defined Codes DT

Action Code

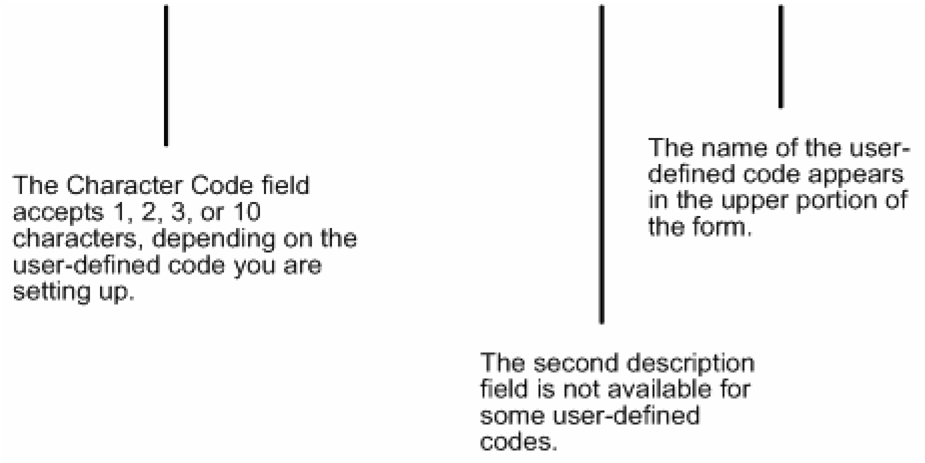
Skip To Code

Document Type - All Documents

02 Character

Code	Description	Description-2
	.	
88	Prior Year Transactions	Hard Coded in G/L
$A	Eventual Withholding	
$B	IB Withholding	
$G	Profit Withholding	
$I	V.A.T. Withholding	
$L	Cleaning Services Withholding	
$S	Contract Withholding	
%	Percentage Journal Entry	Hard Coded in G/L
90	Payment Order	
A	Inv. Cnv. - Adjustments	
AC	Lease Accrual / Deferral	
AD	Asset Disposal	Hard Coded in Fixed Assets
AE	Automatic Entries	Hard Coded

F5=Code Types F14=Memo F15=Where Used F10=Translate F21=Print F24=More



The Character Code field accepts 1, 2, 3, or 10 characters, depending on the user-defined code you are setting up.

The name of the user-defined code appears in the upper portion of the form.

The second description field is not available for some user-defined codes.

Understand User-Defined Codes for Address Book

About User-Defined Codes for Address Book

Each time you create an address book record, you will need to enter a user-defined code in a field. Many fields in the Address Book system accept only user-defined codes. For example, you must enter a user-defined code to specify a search type when you create an address book record. If the search type code is not defined in the user-defined code list, the system will not accept the information.

Some user-defined codes are already set up when you receive the JD Edwards World systems, others you can customize for your business needs.

The user-defined codes in the Address Book system are:

- Address Book Category Codes (01/01-30)
- Who's Who Category Codes (01/W1-9, WT)
- Search Type Codes (01/ST)
- Standard Industry Codes (01/SC)
- Flash Message Codes (00/CM)
- Country Codes (00/CN)
- Salutation Codes (01/SL)
- Electronic Mail Message Type Codes (01/MT)
- Language Preference Codes (01/LP)
- Word Search Stop Word Codes (01/SW)
- Dun & Bradstreet Rating Codes (01/DB)
- Trans World Credit Rating Codes (01/TR)

See Also

- *Working with User-Defined Codes*
- *Setting Up Category Codes*

Address Book Category Codes (01/01-30)

Address book category codes help organize your address book information for specific reporting purposes. For example, you can set up a category called

Salespersons and assign a code for each salesperson. You can set up any number of salespeople.

See Also

- *Working with User-defined Codes (P00051)*

Who’s Who Category Codes (01/W1-9, WT)

Who’s Who category codes let you define additional information for each person you enter on the Who’s Who form. For example, you might set up a category called Holiday and assign a code for each person to whom you send a holiday greeting card. This lets you print a list of all people who receive holiday greeting cards.

See Also

- *Working with User-Defined Codes (P00051)*

Search Type Codes (01/ST)

You can assign search type codes to classify addresses and limit the information that the system uses for searching. Examples include:

Code	Description
A	Applicant
C	Customer
E	Employee
V	Supplier

Standard Industry Codes (01/SC)

You can assign standard industry code (SICs) to group economic activity into areas. The SIC was developed by the U.S. Department of Commerce in conjunction with U.S. businesses. Examples include:

Code	Description
0100	Agricultural Services
1000	Metal Mining
5000	Wholesale Trade
7000	Services

Flash Message Codes (00/CM)

You can assign flash message codes to notify you of a credit status when you locate an address book record. JD Edwards World uses flash messages throughout the Financials systems. Examples include:

Code	Description
B	Bad credit risk
1	Over credit limit
2	Requires purchase order

Country Codes (00/CN)

You can assign codes up to three characters in length to abbreviate a country. Examples include:

Code	Description
AU	Australia
BE	Belgium
CN	China
JP	Japan

See Also

- *Setting Up Country Constants for Address Book (P0070)*

Salutation Codes (01/SL)

You can assign salutation codes to designate a title that precedes the name on a list, mailing label, and so on. Examples include:

Code	Description
A	Mr.
B	Mrs.
C	Ms.
D	Dr.

Electronic Mail Message Type Codes (01/MT)

You can assign message type codes to send a speed message to another user. Examples include:

Code	**Description**
1	Asked that you call back
2	Will call again
3	Returned your call
5	Wants to see you

Language Preference Codes (01/LP)

You can assign language preference codes to identify the language for external documents, such as invoices and statements. These codes work in conjunction with vocabulary overrides to select the correct translation. Examples include:

Code	**Description**
D	Dutch
E	English
F	French
S	Spanish

Word Search Stop Word Codes (01/SW)

You can assign stop word codes that the system ignores when doing a query search. Examples include:

Code	**Description**
Ave	Avenue
Bldg	Building
Blvd	Boulevard
Corp	Corporation

Dun & Bradstreet Rating Codes (01/DB)

You can assign rating codes up to three characters in length, as defined by Dun & Bradstreet. Examples include:

Code	Description
BA1	High
BA2	Good
BA3	Fair
BA4	Limited

Trans World Credit Rating Codes (01/TR)

You can assign credit rating codes up to three characters in length, as defined by Trans World Credit (TRW). Examples include:

Code	Description
AAA	Excellent
BBB	Good
CCC	Fair

Work with User-Defined Codes

Working with User-Defined Codes

From Address Book (G01), enter 29
From Address Book Setup (G0141), choose an option under System Controls and Codes or Other User Defined Codes

Because your system already has some user-defined codes in place, you should verify that they are appropriate for your business needs and set up additional user-defined codes, as needed.

Working with user-defined codes consists of:

- Setting up user-defined codes
- Translating user-defined codes

To set up a user-defined code

On the appropriate user-defined codes form

1. Complete the following fields:
    - Character Code
    - Description
    - Description-2 (optional)
2. Press Enter.

> **Note:** To set up a user-defined code from any user-defined codes form, you must complete the System Code and User-defined Codes fields.

Field	**Explanation**
Character Code	This column contains a list of valid codes for a specific user-defined code list. The number of characters that a code can contain appears in the column title.
Description	A user-defined name or remark.
Description-2	Additional text that further describes or clarifies a field in JD Edwards World systems.

What You Should Know About

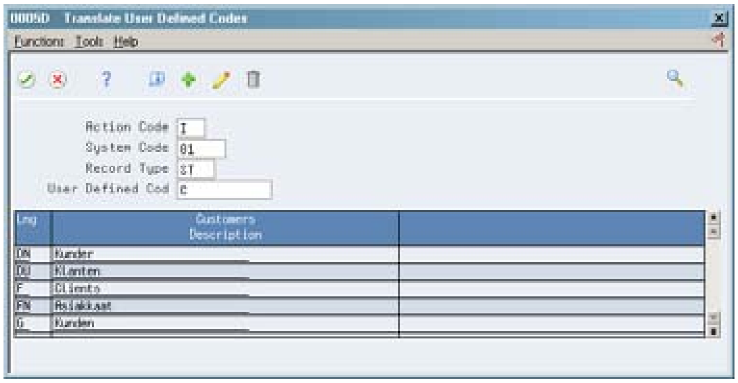
Deleting a user-defined code	To delete a user-defined code, clear the Character Code and Description fields. To delete the entire list, use action code D.
Printing a list of user-defined codes	Choose User-defined Codes List from the General Accounting System Setup menu and run the appropriate DREAM Writer version.
Setting up blank codes	A code of blank in a user-defined code list indicates that a blank is a valid entry for the code. This means that the user-defined code does not require a specific value to be assigned to the field on a form. Leave the character code blank and type a period in the last position of the description to set up a valid code equal to blank.

To translate a user-defined code

Multi-national businesses can translate the descriptions of their user-defined codes. The descriptions work in conjunction with the language specified for each person who uses the JD Edwards World system. For example, if a French-speaking user accesses a user-defined code that has a French translation, the description appears in French.

On the appropriate user-defined codes form

1. Choose a code to translate.
2. Access Translate (F18).



Action Code: I
System Code: 01
Record Type: ST
User Defined Cod: C

Lng	Customers Description	
DN	Kunder	
DU	Klanten	
F	Clients	
FN	Asiakkaat	
G	Kunden	

3. On Translate User-defined Codes, complete the following fields:
   - Language
   - Description
   - Description 02 (optional)

Field	Explanation
Language	A user-defined code (system 01 / type LP) that specifies a language to use in forms and printed reports. For World, if you leave the Language field blank, the system uses the language that you specify in your user preferences. If you do not specify a language in your user preferences, the system uses the default language for the system. Before any translations can become effective, a language code must exist at either the system level or in your user preferences.

Processing Options

See User Defined Codes (P0005A).

Set Up Category Codes for Address Book

About Setting Up Category Codes for Address Book

From Address Book (G01), enter 29
From Address Book Setup (G0141), choose **Address Book Category Codes** or **Who's Who Category Codes**

You can set up category codes to organize your address book information and to quickly retrieve records for reporting purposes. Category codes are user-defined codes that you can customize for your business needs.

JD Edwards World provides 40 category codes. Setting up these codes consists of:

- Setting Up Address Book Category Codes
- Setting Up Who's Who Category Codes

Address Book has 30 category codes, and Who's Who has 10.

Although category codes are assigned to system code 01, the system uses them throughout multiple JD Edwards World systems for various purposes. The following information describes some of the systems that use category codes:

System	Description
Accounts Payable	Used for reporting purposes. You can map any ten of the thirty Address Book category codes for Accounts Payable.
Accounts Receivable (category codes 1 - 10)	Used for reporting purposes. You can use Category codes 01 and 02 to create subgroups for credit management purposes.
Payroll (category code 10)	Used for IRS reporting requirements by railroad clients who use the Payroll system.
Electronic Mail (category codes 01 - 04)	Used for reporting purposes to track information, such as branches, salespersons, and territories.

Category codes 11 - 30 are used primarily by the Address Book system.

Before You Begin

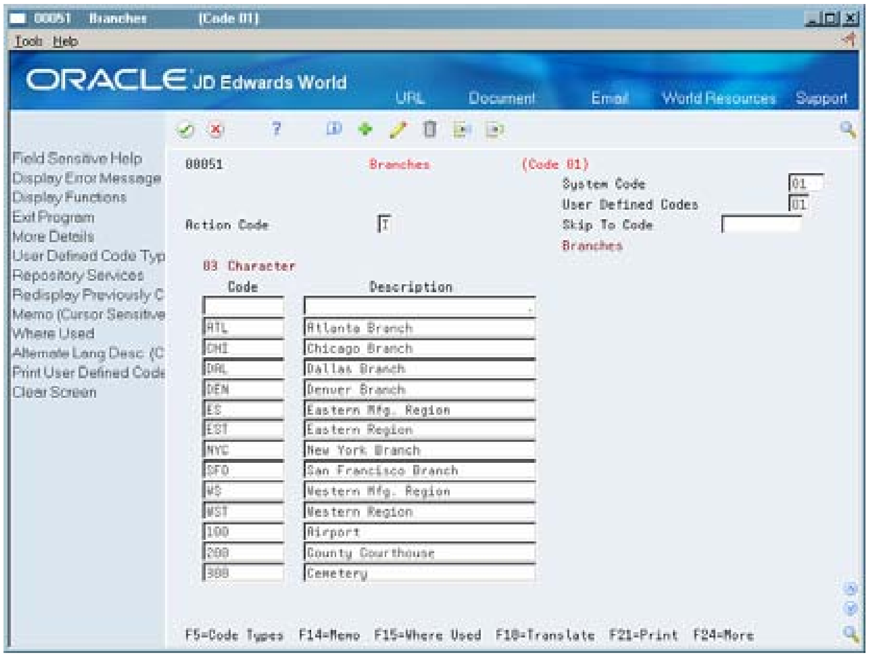
- Determine the following:
  - Types of groups (categories) you need for reporting
  - Specific category code values you need within each group

See Also

- *Working with User Defined Codes*

Setting Up Address Book Category Codes

You can set up category codes to group your address book information and quickly locate records for a specific purpose, such as reporting. For example, you might set up a category code called Sales Territory and assign a code for each territory. Then, when you enter a customer or prospect in the address book, you can assign a territory to the record. This assignment allows you to print a list of addresses by sales territory.


00051 Branches (Code 01)
Tools Help
ORACLE JD Edwards World
URL
Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
More Details
User Defined Code Typ
Repository Services
Redisplay Previously C
Memo (Cursor Sensitive
Where Used
Alternate Lang Desc (C
Print User Defined Code
Clear Screen

00051 Branches (Code 01)

System Code: 01
User Defined Codes: 01
Action Code: I
Skip To Code:
Branches

03 Character

Code	Description
ATL	Atlanta Branch
CHI	Chicago Branch
DAL	Dallas Branch
DEN	Denver Branch
ES	Eastern Mfg. Region
EST	Eastern Region
NYC	New York Branch
SFO	San Francisco Branch
WS	Western Mfg. Region
WST	Western Region
100	Airport
200	County Courthouse
300	Cemetery

F5=Code Types F14=Memo F15=Where Used F10=Translate F21=Print F24=More

Setting Up Who’s Who Category Codes

You can set up category codes to define additional information for each person that you enter on Who’s Who. For example, you might set up a category called Job Function and assign codes for each job. When you enter Who’s Who information for a person, you can assign a job code to that person. This assignment lets you print a list of people with the same job function.

Set Up Next Numbers

Setting Up Next Numbers

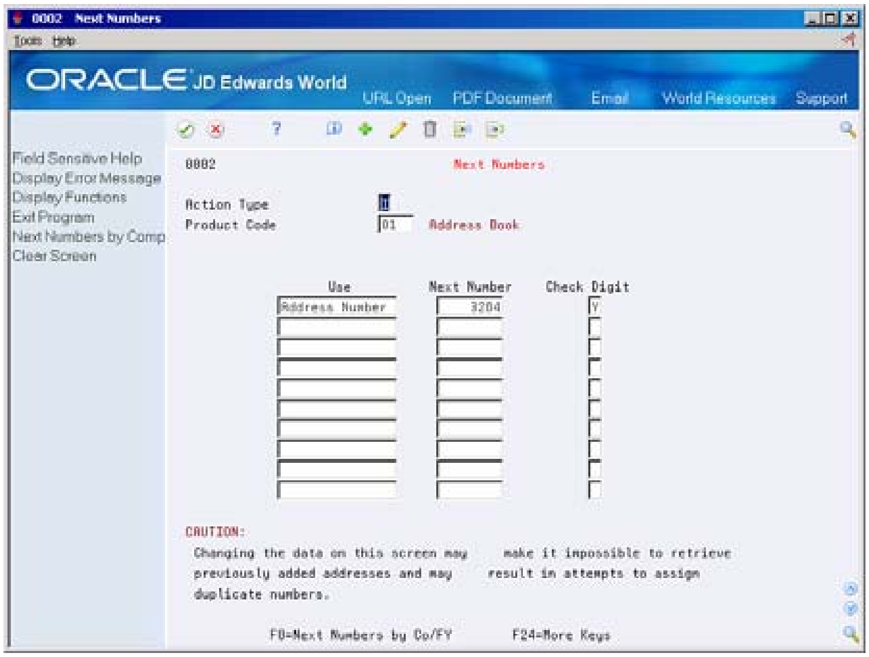
✦	From Master Directory (G), enter 29 From General Systems (G00), choose **Next Numbers**

When you enter a document, such as an invoice or journal entry, you can assign a document number or let the next numbers program assign one. Next Numbers assigns numbers to documents using either or both of the following:

- Standard next numbers. The system finds the next available number in the Next Numbers table (F0002) and assigns the number to the document.
- Next numbers by company and fiscal year. The system assigns a unique set of next numbers for each company, fiscal year, or combination of company and fiscal year in the Next Numbers by Company / Fiscal Year table (F00021).

Setting up next numbers consists of:

- Reviewing standard next numbers
- Activating check digits for standard next numbers


0002 Next Numbers
Tools
Help
ORACLE JD Edwards World
URL Open
PDF Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
Next Numbers by Comp
Clear Screen

```
0002                         Next Numbers

Action Type           I
Product Code          01    Address Book

             Use             Next Number     Check Digit
        Address Number            3204            Y

CAUTION:
 Changing the data on this screen may    make it impossible to retrieve
 previously added addresses and may    result in attempts to assign
 duplicate numbers.

          F8=Next Numbers by Co/FY        F24=More Keys
```

What You Should Know About

Changing next numbers	Do not change any next numbers after you start using the JD Edwards World systems. Changing the numbers can result in duplicates as well as the inability to locate previously added numbers.
Changing the sequence of next numbers	Do not change the sequence of the next numbers in the table. Each next number must remain on its current line because programs reference a specific line in the table. For example, in the General Accounting system the next number for journal entries must be on the second line.

To review standard next numbers

On Next Numbers

1. Complete the following field:
   - System Code
2. Verify information in the following field:
   - Next Number

Field	Explanation
System Code	A user-defined code (98/SY) that identifies a JD Edwards World system.
Next Number	The number that the system will use next when assigning numbers. Next numbers can be used for many types of entries, including voucher numbers, invoice numbers, journal entry numbers, employee numbers, address numbers, contract numbers, and so on. You must use the next numbers already established, unless custom programming has been provided.

To activate check digits for standard next numbers

You can have the system assign check digits for any set of standard next numbers. Check digits prevent errors caused by transposition during data entry. For example, activating check digits in the address book for suppliers prevents a voucher from being assigned to the wrong supplier if digits are transposed during voucher entry.

JD Edwards World recommends that you use check digits for next numbers only if a transposition during data entry is likely to create errors.

On Next Numbers

1. Complete the following field:
   - System Code

2. For each set of next numbers, complete the following field:
   - Check Digit

Field	Explanation
Check Digit	A code that specifies whether the system adds a number to the end of each next number assigned. For example, if you are using check digits and the next number is 2, the system will add a check digit such as 7, making the last two numbers 27. Check digits provide a method of randomly incrementing numbers to prevent the assignment of transposed numbers. In the example above, the system would never assign next number 72 while check digits are activated. Valid codes are: Y Yes, add a check digit to this next number N No, do not add a check digit

Set Up Consolidation Codes

Setting Up Consolidation Codes

From Address Book (G01), enter **hidden selection 29**
From Address Book Setup (G0141), choose **Consolidation Code Revisions**

The Consolidation Code is a way to group associated Address Book numbers in order to report on group financial data.

An example would be a chain of stores such as Dollar Stores. You might have multiple Address Book records set up, one for each store, in order to have different default, control and statistics associated with each store. However, all stores may be owned and operated by a single corporate entity for which you want information reported on a consolidated basis.

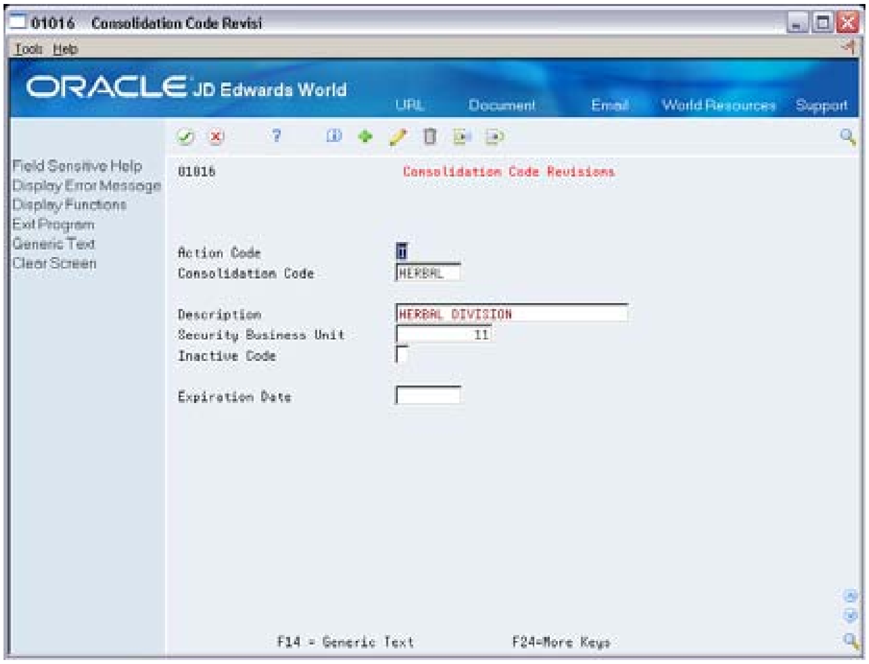
The Parent Child relationship can accomplish some of this reporting for just one level but because we allow multi-level parent/child setup, it is more complicated to use. The Consolidation Code offers a simpler way to achieve consolidated reporting. Each Address Book number may be assigned a Consolidation Code and this code is defaulted to each invoice and voucher entered for the Address. You can then run standard reports using DREAM Writer processing to sort and select on this code. Consolidation codes are stored in the Consolidation Code file (F01016).

Selected inquiries to allow for Consolidation Code inquiry such as Customer and Supplier Ledger, as well as Speed Release.

To set up consolidation codes

The Consolidation Code must be defined and entered on Consolidation Code Revisions (P01016) prior to its use in Address Book. If you want to leave the Consolidation Code blank, you must set 'blank' up as a valid code in the file. You must also provide a description of the group you are trying to consolidate.

On Consolidation Code Revisions


01016 Consolidation Code Revisi
Tools Help
ORACLE JD Edwards World
URL
Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
Generic Text
Clear Screen

01016 Consolidation Code Revisions

Action Code I
Consolidation Code HERBAL
Description HERBAL DIVISION
Security Business Unit 11
Inactive Code
Expiration Date

F14 = Generic Text F24=More Keys

Complete the following fields

- Consolidation Code
- Description
- Security Business Unit (optional)
- Inactive Code (optional)
- Expiration Date (optional)

Field	**Explanation**
Consolidation Code	A code for grouping address numbers. This field is alpha-numeric and can be up to eight characters.
Description	A description of the code.
Security Business Unit	You may assign a business unit to the code to be used with Business Unit security

Field	Explanation
Inactive Code	Use this to deactivate a code. If a code is set as inactive, errors will occur if you try and enter transactions for any address number associated with the code, for example invoice entry, voucher, entry, sales order entry, etc.
Expiration Date	You may record when a code is no longer used. This is informational only and there are no edits against this date.

6 Parent/Child Relationships

Overview to Parent/Child Relationships

Objectives

- To create and revise organizational structures
- To sequence organizational structures

About Parent/Child Relationships

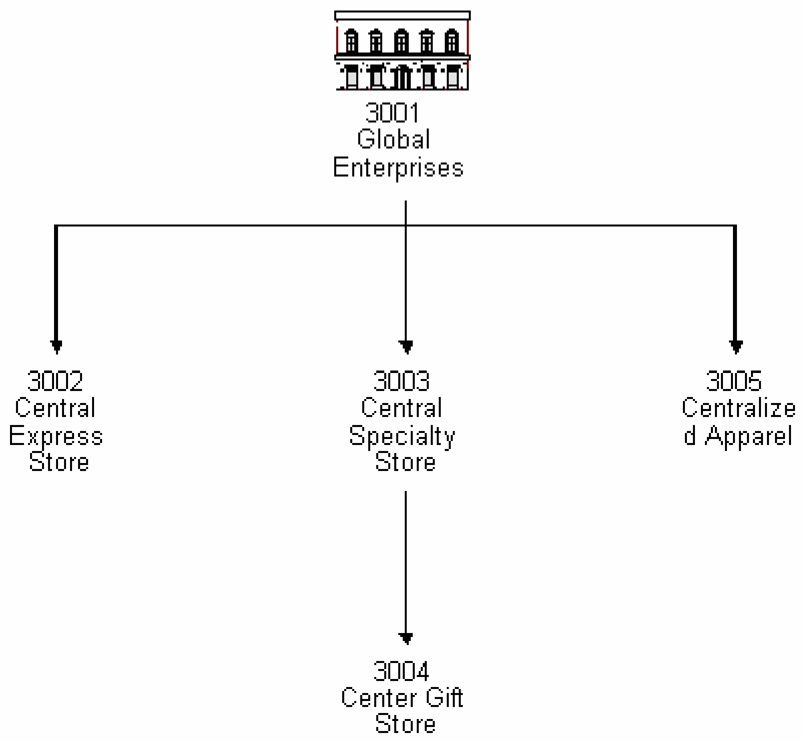
After you enter addresses in the Address Book system, you can define parent/child relationships among them. You can set up these relationships for:

- Accounts receivable structures
- Accounts payable structures
- Reporting structures within your organization

You can define two types of structures:

- A structure in which an address can appear multiple times
- A structure in which an address can appear only once

The following graphic illustrates the structural relationship between a company and its subsidiaries:


3001
Global
Enterprises
3002
Central
Express
Store
3003
Central
Specialty
Store
3005
Centralize
d Apparel
3004
Center Gift
Store

Before You Begin

- Set up address numbers
- Set up parent/child structure types in the user defined code list (01/TS)

Work with Parent/Child Relationships

Working with Parent/Child Relationships

Address book records are organized into multiple levels of parent/child relationships, arranged in tree-like structures. Use parent/child relationships for e-mail distribution lists and A/R and A/P reporting structures.

Working with parent/child relationships consists of:

- Creating Parent/Child Relationships
- Viewing Parent/Child Relationships
- Printing Parent/Child Relationships

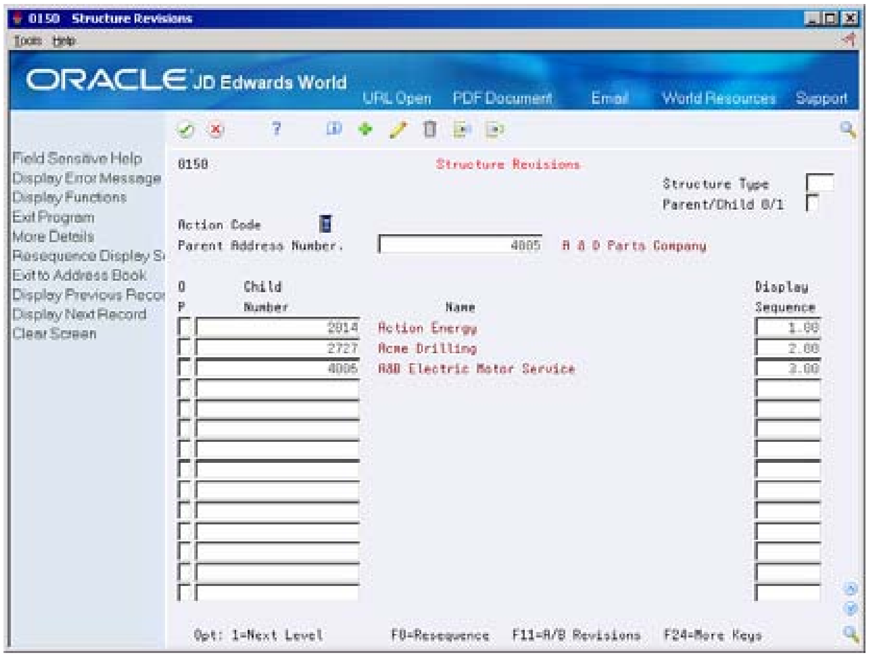
Creating Parent/Child Relationships

From Address Book (G01), enter 27
From A/B Advanced and Technical Operations (G0131), choose **Organizational Structure**
From Address Book Organizational Structure (G01311), choose **Structure Revisions**

You can create parent/child relationships for use in e-mail, A/R, and A/P. For example, in A/R you create parent/child relationships to track which children owe money to a parent.

To create parent/child relationships

On Structure Revisions


0150 Structure Revisions
Tools Help
ORACLE JD Edwards World
URL Open
PDF Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
More Details
Resequence Display S
Exit to Address Book
Display Previous Recor
Display Next Record
Clear Screen

0150 Structure Revisions

Structure Type

Parent/Child 0/1

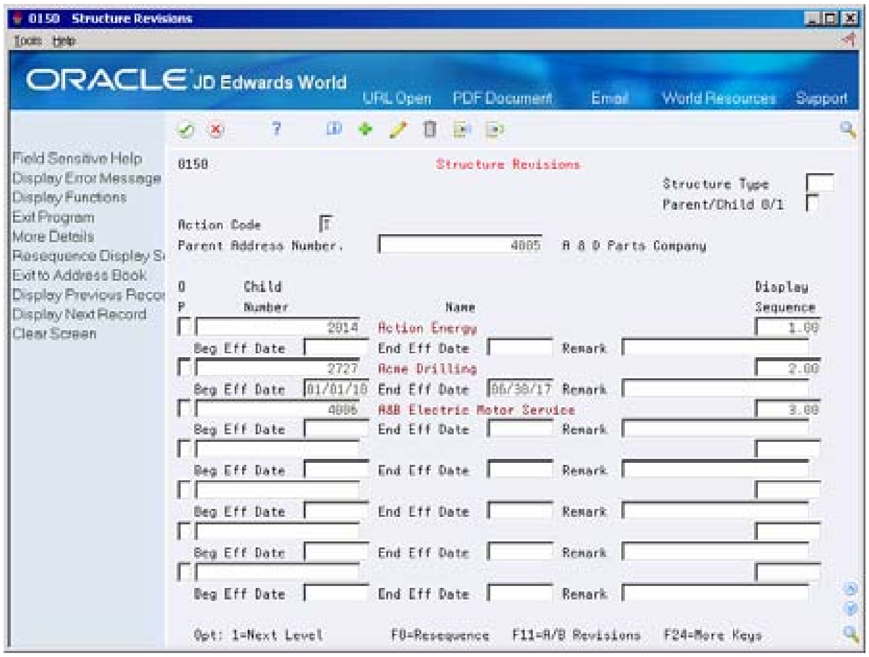
Action Code

Parent Address Number. 4005 A & D Parts Company

O P	Child Number	Name	Display Sequence
	2014	Action Energy	1.00
	2727	Acme Drilling	2.00
	4006	A&B Electric Motor Service	3.00

Opt: 1=Next Level F8=Resequence F11=A/B Revisions F24=More Keys

1. Complete the following fields for inquiry:
   - Parent Address Number
   - Structure Type (optional)
   - Parent/Child 0/1 (optional)
2. Access the detail area (F4).


0150 Structure Revisions
Tools Help
ORACLE JD Edwards World
URL Open
PDF Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
More Details
Resequence Display S
Exit to Address Book
Display Previous Recor
Display Next Record
Clear Screen

0150 Structure Revisions

Structure Type

Parent/Child 0/1

Action Code I

Parent Address Number. 4005 A & D Parts Company

O P	Child Number	Name	Display Sequence
	2014	Action Energy	1.00
	Beg Eff Date	End Eff Date	Remark
	2727	Acme Drilling	2.00
	Beg Eff Date 01/01/10	End Eff Date 06/30/17	Remark
	4006	A&B Electric Motor Service	3.00
	Beg Eff Date	End Eff Date	Remark

Opt: 1=Next Level F8=Resequence F11=A/B Revisions F24=More Keys

3. Complete the following fields:

- Child Number
- Display Sequence
- Beginning Effective Date (optional)
- Ending Effective Date (optional)
- Remark (optional)

Field	Explanation
Child Number	The address book number that you want to assign as a child of the parent address number.
Structure Type	A user-defined code (01/TS) that identifies a type of organizational structure with its own hierarchy in the Address Book system. For example, Accounts Receivable or e-mail. *Form-specific information* The structure type for customers or suppliers must be blank. The Accounts Payable and Accounts Receivable systems will use the blank structure type for parent/child processing.
Parent/Child 0/1	Determines whether child addresses or parent addresses will be displayed. Valid values are: 0 Child addresses (default) 1 Parent addresses 2 The entire structure (parents and all children)
Beg Eff Date	The date on which the address book record will appear in the structure. The Beginning Effective Date field will prevent the address number from occurring in the structure until the beginning effective date is the same as the current date. If left blank, the address number will always occur in a structure unless there is an ending effective date.
End Eff Date	The date on which the address book record will cease to exist in the structure.
Remark	A generic field that you use for a remark, description, name, or address.
Sequence	A number that reorders a group of records on the form. *Form-specific information* Type 1 next to the address book number you want displayed first. Type 2 next to the address book number you want displayed second, and so on.

What You Should Know About

Setting up permanent distribution lists	When setting up permanent distribution lists, you must create parent/child relationships.
Deleting parent/child relationships	Because you must locate the parent of an organization before you can delete the organization, ensure that the processing option is not set to display children.
Creating parent/child relationships for payables companies	When creating parent/child relationships for payables companies, you must leave the structure type blank.

Viewing Parent/Child Relationships

From Address Book (G01), enter 27
From A/B Advanced and Technical Operations (G0131), choose **Organizational Structure**
From Address Book Organizational Structure (G01311), choose **Structure Inquiry**

After you create parent/child relationships, you can view all or part of the structure rather than each individual parent and children within the structure in any of the following ways:

- With the levels indented or aligned
- Through certain levels
- Through certain dates

You can also:

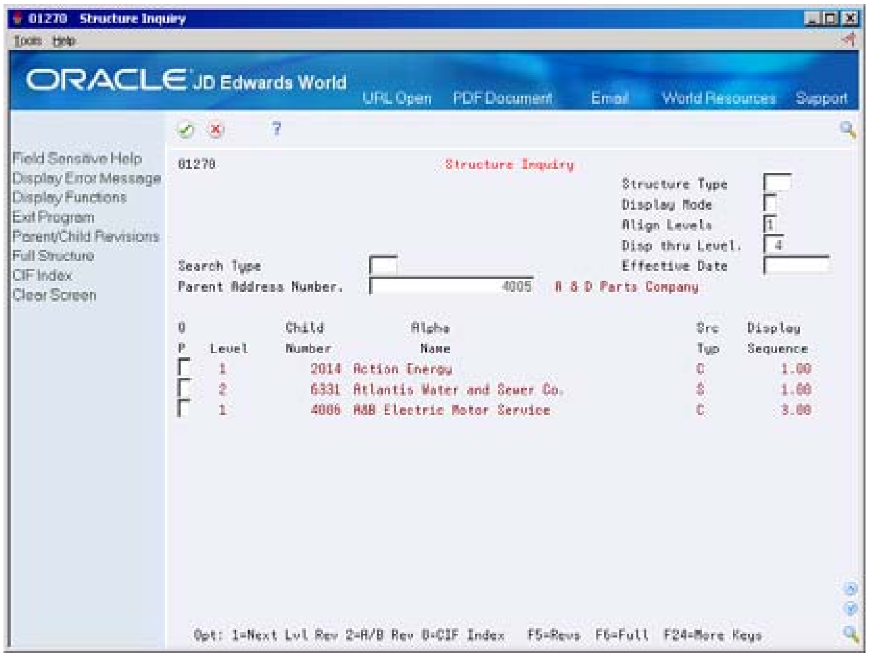
- Revise parent/child relationships on Structure Revisions
- Revise address book information on Address Book Revisions
- View information for a particular address on the Central Information File (CIF) Index

Before You Begin

- To preload certain header information, set the appropriate processing option

To view parent/child relationships

On Structure Inquiry


01270 Structure Inquiry
Tools Help
ORACLE JD Edwards World
URL Open
PDF Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
Parent/Child Revisions
Full Structure
CIF Index
Clear Screen

01270 Structure Inquiry

Structure Type
Display Mode
Align Levels 1
Disp thru Level. 4
Effective Date
Search Type
Parent Address Number. 4005 A & D Parts Company

O P	Level	Child Number	Alpha Name	Src Typ	Display Sequence
☐	1	2014	Action Energy	C	1.00
☐	2	6331	Atlantis Water and Sewer Co.	S	1.00
☐	1	4006	A&B Electric Motor Service	C	3.00

Opt: 1=Next Lvl Rev 2=A/B Rev 8=CIF Index F5=Revs F6=Full F24=More Keys

Complete the following field:

- Parent address number

Depending on how you set the processing option, the system preloads the following information:

- Display mode
- Align levels
- Display thru level
- Effective date
- Structure type

Field	Explanation
Align Levels	A code that determines whether levels are indented or aligned on the form. Valid values are: 0 indented 1 aligned
Disp thru Level	A number indicating the level of a child in the relationship to its parent in a hierarchy.

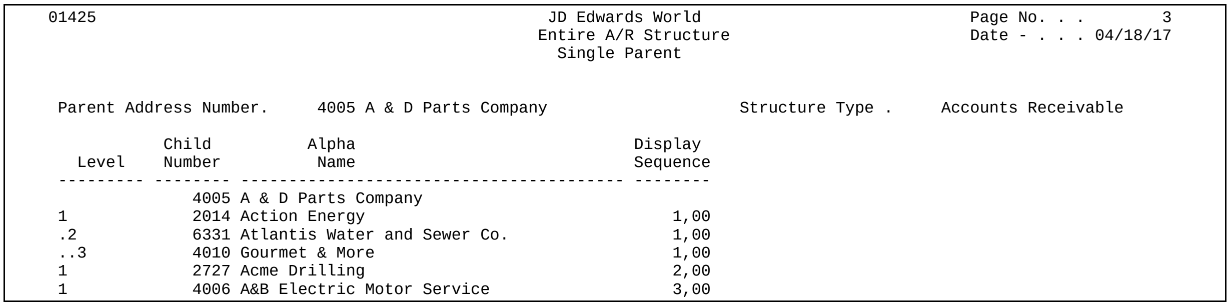
Printing Parent/Child Relationships

From Address Book (G01), enter 27
From A/B Advanced and Technical Operations (G0131), choose **Organizational Structure**
From Address Book Organizational Structure (G01311), choose **Structure Print**

After viewing an organizational structure, you might want to print it. You can print:

- A single parent / multiple child organizational structure
- The entire structure type with all of its associated parents and children

Printing this report is especially helpful when researching accounts receivable relationships.



```
01425                                               JD Edwards World                            Page No. . .        3
                                                   Entire A/R Structure                         Date - . . . 04/18/17
                                                     Single Parent


 Parent Address Number.     4005 A & D Parts Company                    Structure Type .     Accounts Receivable

            Child          Alpha                             Display
   Level    Number          Name                             Sequence
 --------- -------- ---------------------------------------- --------
               4005 A & D Parts Company
 1             2014 Action Energy                                1,00
 .2            6331 Atlantis Water and Sewer Co.                 1,00
 ..3           4010 Gourmet & More                               1,00
 1             2727 Acme Drilling                                2,00
 1             4006 A&B Electric Motor Service                   3,00
```

Processing Options

See Address Book Organization Structure Revisions (P0150).

See Structure Print (P01425).

7 Address Book Supplemental Data

Overview to Address Book Supplemental Data

Objectives

- To create a database of information about your addresses that is both meaningful and useful to your organization
- To determine what data you want to track
- To determine how you want to report the data
- To set up, add, and revise the data
- To secure the data

About Address Book Supplemental Data

In addition to the data in the standard master tables (Customer Master, Supplier Master, and Address Book Master), you can maintain supplemental data with the Central Information File (CIF). This file contains different types of data for prospects, employees, customers, and suppliers.

Generally, the data you maintain for an employee is different from the data you maintain for a customer or prospect. You can assign search types to differentiate among these different types of address book entries. In addition, you can transfer data. For example, if your prospect eventually becomes your customer, you can transfer their data to a new customer record by changing the search type of the address book number.

After you set up your supplemental data, you can classify the data by categories, such as accounts payable, accounts receivable, or sales. You can then control which data type classifications display upon inquiry. You can also allow or disallow access to data types. You control data type classifications and access to data types by setting up sequences for:

- Group IDs
- User IDs
- *ALL

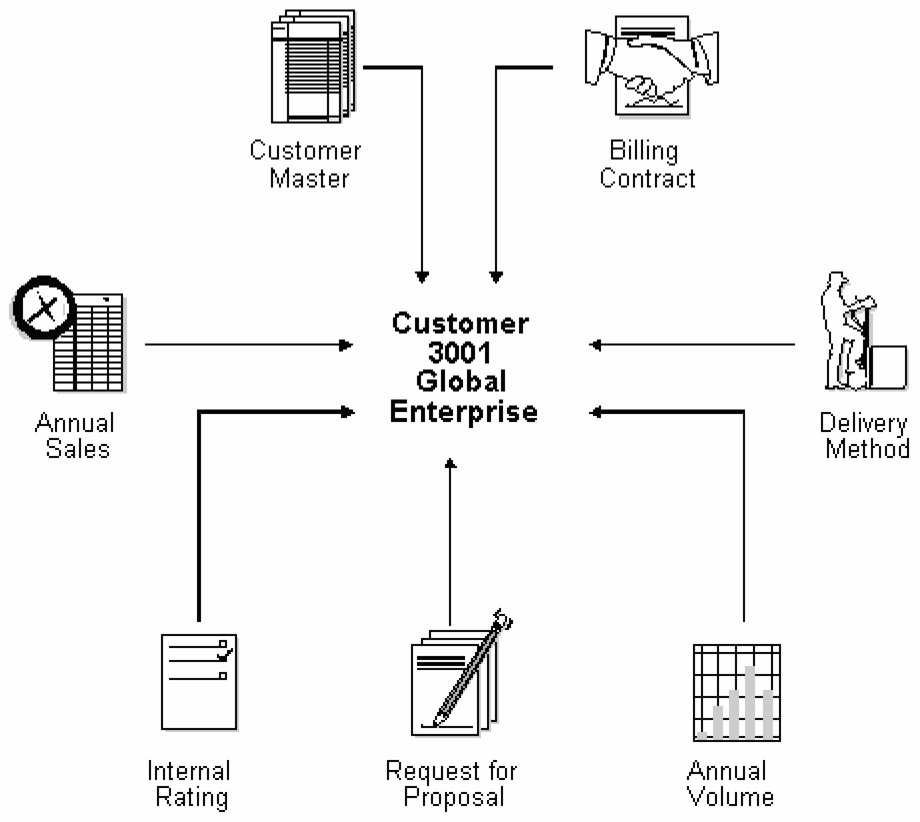
The tasks within address book supplemental data consist of:

- Defining data types
- Entering and copying supplemental data
- Changing data types

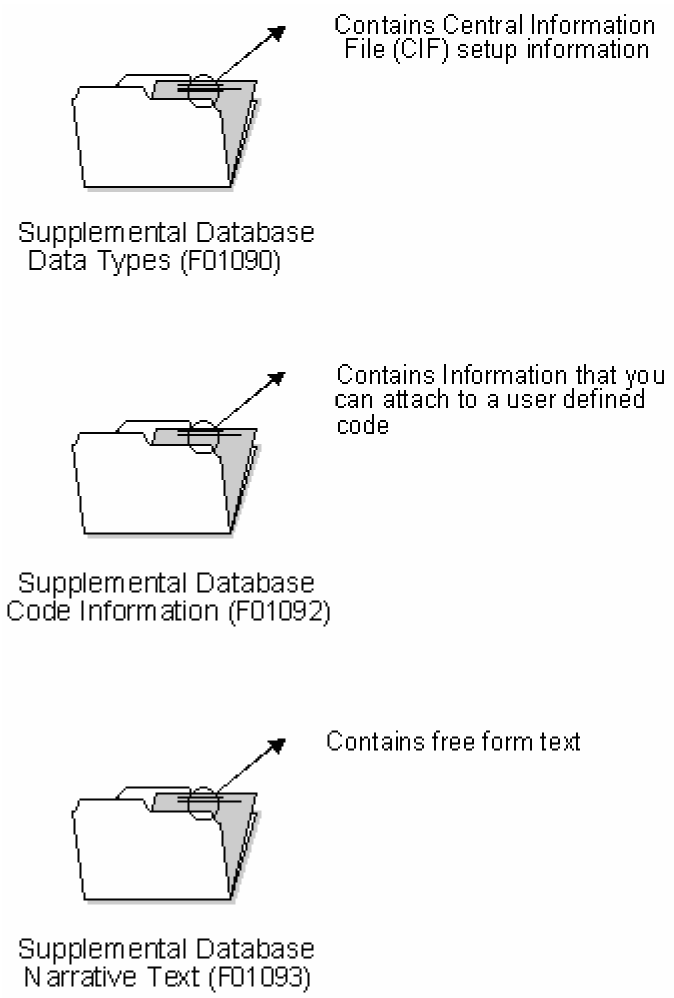
- Viewing supplemental data
- Working with supplemental data reports

When Do You Use Supplemental Data?

There are many uses for supplemental data in your business. The following graphic shows several commonplace applications for supplemental data.


Customer Master
Billing Contract
Annual Sales
Customer 3001 Global Enterprise
Delivery Method
Internal Rating
Request for Proposal
Annual Volume

What Are the Major Tables in the Supplemental Database?


Contains Central Information File (CIF) setup information
Supplemental Database Data Types (F01090)
Contains Information that you can attach to a user defined code
Supplemental Database Code Information (F01092)
Contains free form text
Supplemental Database Narrative Text (F01093)

Define Supplemental Data

Defining Supplemental Data

Defining supplemental data is useful in adding detail to your address book records. For example, you can specify what percentage discount each customer is receiving, who your contact person is, and when payments are due.

Defining supplemental data consists of:

- Defining Data Types
- Defining CIF Sequences
- Defining Supplemental Data Security

Before You Begin

- Set up address book records for the entities to which you want to attach supplemental data

Defining Data Types

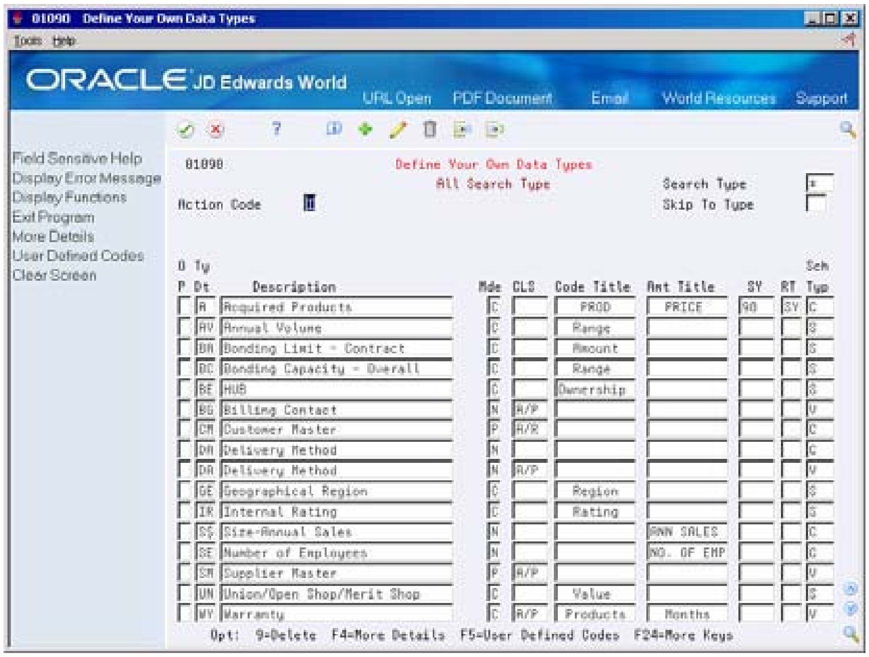
From Address Book (G01), enter 27
From A/B Advanced and Technical Operations (G0131), choose **CIF Supplemental Data**
From CIF Supplemental Data (G01312), choose **Define Your Own Data Type**

Data types are user-defined codes that you use to organize data. You define how you will use a data type or group of data types by determining what type of information that you want to track for each data type. Three modes are available:

Mode	Description
Code	You can define column titles for the information to be entered. The CIF includes dates, amounts, and supplemental data, which can be associated with a user-defined code (UDC) table.
Narrative	You can enter notes, memos, and so on.
Program	You can automatically run a program that displays your customer data.

Complete the following tasks:

- Define a code data type
- Define a narrative data type
- Define a program data type


01090 Define Your Own Data Types
Tools Help
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URL Open
PDF Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
More Details
User Defined Codes
Clear Screen

01090 Define Your Own Data Types

All Search Type

Action Code I

Search Type *

Skip To Type

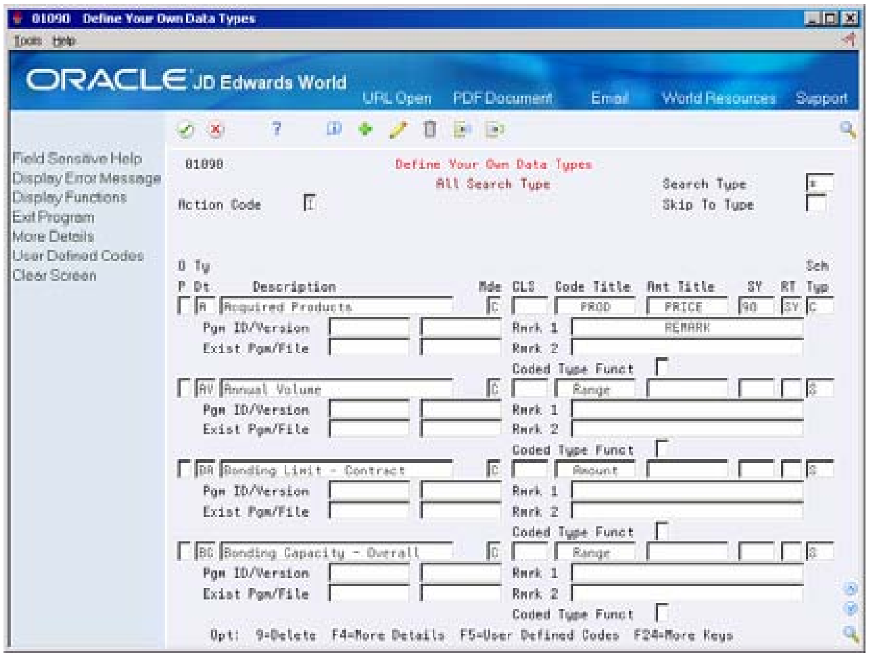
O P	Ty Dt	Description	Mde	CLS	Code Title	Amt Title	SY	RT	Sch Typ
	A	Acquired Products	C		PROD	PRICE	90	SY	C
	AV	Annual Volume	C		Range				S
	BA	Bonding Limit - Contract	C		Amount				S
	BC	Bonding Capacity - Overall	C		Range				S
	BE	HUB	C		Ownership				S
	BG	Billing Contact	N	A/P					V
	CM	Customer Master	P	A/R					C
	DA	Delivery Method	N						C
	DA	Delivery Method	N	A/P					V
	GE	Geographical Region	C		Region				S
	IR	Internal Rating	C		Rating				S
	S$	Size-Annual Sales	N			ANN SALES			C
	SE	Number of Employees	N			NO. OF EMP			C
	SM	Supplier Master	P	A/P					V
	UN	Union/Open Shop/Merit Shop	C		Value				S
	WY	Warranty	C	A/P	Products	Months			V

Opt: 9=Delete F4=More Details F5=User Defined Codes F24=More Keys

To define a code data type

On Define Your Own Data Types

1. Complete the following fields:
    - Type Data
    - Mode (Mde)
2. Complete the following optional fields:
    - Description
    - Class (CLS)
    - Code Title
    - Amount Title
    - System (SY)
    - Record Type (RT)
    - Search Type
3. Access the detail area (F4).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Field Sensitive Help
Display Error Message
Display Functions
Exit Program
More Details
User Defined Codes
Clear Screen

```
01090                Define Your Own Data Types
                          All Search Type              Search Type   *
Action Code   I                                        Skip To Type

O Ty                                                                  Sch
P Dt    Description                Mde CLS  Code Title  Amt Title  SY  RT  Typ
  A     Acquired Products          C        PROD        PRICE      90  SY  C
     Pgm ID/Version                    Rmrk 1         REMARK
     Exist Pgm/File                    Rmrk 2
                                       Coded Type Funct
  AV    Annual Volume              C        Range                          S
     Pgm ID/Version                    Rmrk 1
     Exist Pgm/File                    Rmrk 2
                                       Coded Type Funct
  DR    Bonding Limit - Contract   C        Amount                         S
     Pgm ID/Version                    Rmrk 1
     Exist Pgm/File                    Rmrk 2
                                       Coded Type Funct
  BC    Bonding Capacity - Overall C        Range                          S
     Pgm ID/Version                    Rmrk 1
     Exist Pgm/File                    Rmrk 2
                                       Coded Type Funct
   Opt:  9=Delete  F4=More Details  F5=User Defined Codes  F24=More Keys
```

4. Complete the following optional fields:

- Remark 1
- Remark 2
- Coded Type Function

5. Press Enter

Field	Explanation
Type Data	A code that identifies a specific type of data within a classification.
Mde	The format of a data type. This code determines the display mode for supplemental data. Valid codes are: C Code format, which displays the form for entering code-specific information. These codes are associated with User-defined Codes table (F0005). N Narrative format, which displays the form for entering narrative text. P Program exit, which allows you to exit to the program you specified in the Pgm ID field. M Message format, which displays the form for entering code-specific information. However, the system can edit the code values you enter against values in the Generic Rates and Messages table (F00191). This code is not used by the Human Resources or Financials systems.
Description	A user-defined name or remark.

Field	Explanation
CLS	A user-defined code that identifies a group of data types in the Central Information File.
Code Title	The heading for a column on Supplemental Data Entry that relates to user-defined codes. Enter the user-defined codes for the supplemental data type in this column. For example, if the supplemental data type relates to the educational degrees of employees (BA, MBA, PHD, and so on), the heading could be Degree.
Amt Title	The heading for a column on Supplemental Data Entry that relates to an amount. This column contains statistical or measurable information. For example, if the data type relates to bid submittals, the heading could be Bid Amounts.
SY	A user-defined code (98/SY) that identifies a JD Edwards World system.
RT	Identifies the table that contains user-defined codes. The table is also referred to as a code type. *Form-specific information* This code identifies the record (code) type, such as BS for bid submittals, DT for document type, MC for business unit type, PY for payment instrument, and so on.
Search Type	A user-defined code (01/ST) that identifies the kind of address book record you want the system to select when you search for a name or message. For example: E Employees X Ex-employees V Suppliers C Customers P Prospects M Mail distribution lists
Rmrk 1	The heading for a column on Supplemental Data Entry that relates to user-defined codes. This heading describes the first Remark field on the data entry form. It contains additional information and remarks. For example, if the data type relates to bid submittals, the heading could be Subcontractor.
Rmrk 2	The heading for a column on Supplemental Data Entry that relates to user-defined codes. This heading describes the second Remark field on the data entry form. It contains additional information and remarks. For example, if the data type relates to the educational degrees of employees, the heading could be College or University.

Field	Explanation
Coded Type Function	This field applies to data types that are designated as Coded types (have a C in the Display Mode field). The value you enter determines which information (valid code value or amount value) will appear on the Communications form (P010921). If a code value is expected to be entered for this data type, enter a blank or 0 in this field. If a statistical or measurable amount will be entered with no code value, then you enter 1 in this field. If both a coded value and an amount will be entered, leave this field blank.

To define a narrative data type

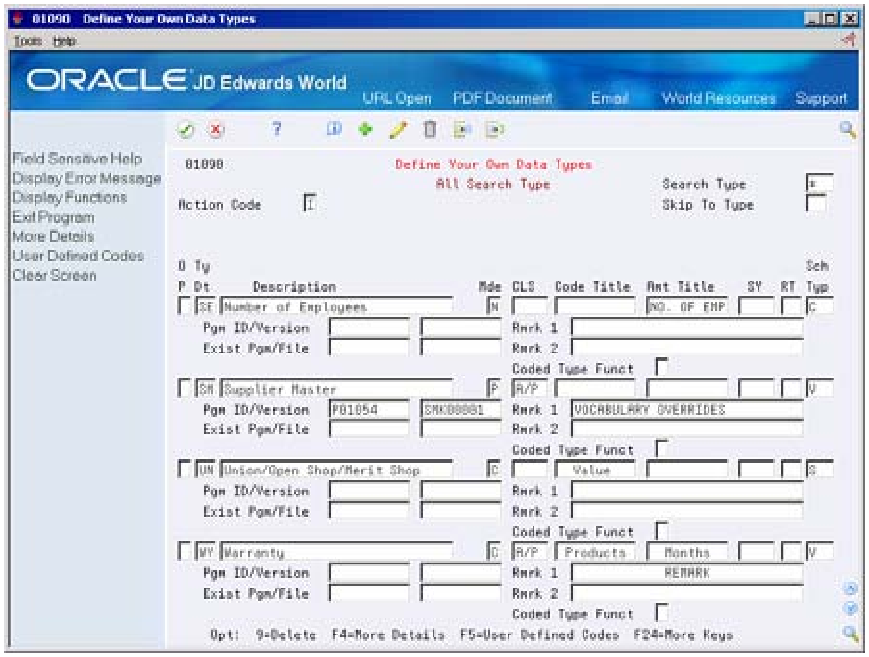
On Define Your Own Data Types

1. Complete the following fields:
   - Type Data
   - Mode (Mde)
2. Complete the following optional fields:
   - Description
   - Class (CLS)
   - Search Type
3. Press Enter.

To define a program data type

On Define Your Own Data Types

1. Complete the following fields:
   - Type Data
   - Mode (Mde)
2. Complete the following optional fields:
   - Description
   - Class (CLS)
   - Search Type
3. Access the detail area (F4).



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Tools Help
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URL Open
PDF Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
More Details
User Defined Codes
Clear Screen

01090 Define Your Own Data Types

All Search Type

Action Code I

Search Type *

Skip To Type

O P	Ty Dt	Description	Mde	CLS	Code Title	Amt Title	SY	RT	Sch Typ
☐	SE	Number of Employees	N			NO. OF EMP			C
☐	SM	Supplier Master	P	A/P					V
☐	UN	Union/Open Shop/Merit Shop	C		Value				S
☐	WY	Warranty	C	A/P	Products	Months			V

SE Number of Employees: Pgm ID/Version; Exist Pgm/File; Rmrk 1; Rmrk 2; Coded Type Funct ☐

SM Supplier Master: Pgm ID/Version P01054 SMK00001; Exist Pgm/File; Rmrk 1 VOCABULARY OVERRIDES; Rmrk 2; Coded Type Funct ☐

UN Union/Open Shop/Merit Shop: Pgm ID/Version; Exist Pgm/File; Rmrk 1; Rmrk 2; Coded Type Funct ☐

WY Warranty: Pgm ID/Version; Exist Pgm/File; Rmrk 1 REMARK; Rmrk 2; Coded Type Funct ☐

Opt: 9=Delete F4=More Details F5=User Defined Codes F24=More Keys

4. Complete the following fields:
   - Program ID
   - Version
5. Complete the following optional fields:
   - Existing Program
   - File
6. Press Enter.

Field	Explanation
Pgm ID / Version	Specifies the name of an executable program. This name must follow the standard AS/400 naming conventions and all of JD Edwards World standards for program names (that is, the beginning character must be a J, P, or X).
Exist Pgm / File	The number of a specific table. For example, the General Ledger Master table name is F0901. See the Standards Manual on the programmers' menu for naming conventions. Within the Cross Reference Search facility, this represents names of all types of objects (that is, programs, tables, field names, data dictionary names, and so on). One special reserved name for displaying overall total RPG statistical information is "XRPGTOT" in combination with type="P" and to display type="#". For example, the table name for a French Electronic Funds Transfer is F04572F.

What You Should Know About

Deleting data types

You can delete data types individually. Be certain not to delete the entire table. To delete a data type, use the Change action and enter 9 in the Option field next to the data type you want to delete.

Defining CIF Sequences

From Address Book (G01), enter 27
From A/B Advanced and Technical Operations (G0131), choose CIF Supplemental Data
From CIF Supplemental Data (G01312), choose CIF Sequence Revisions

You set up sequences to include and exclude data types, depending on who you want to access certain data types. You set up the sequences by one of the following:

- User ID
- User class/group

For example, if you use the user class/group to search on accounts payable, the following data types might appear:

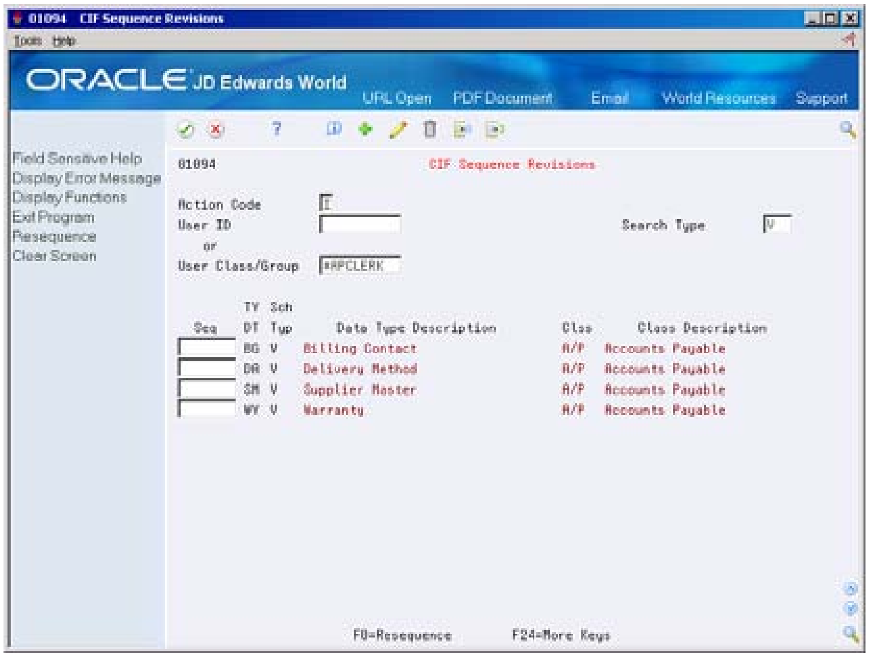
- Billing Contact
- Delivery Method
- Supplier Master
- Warranty

If you want an employee to view the supplier master and none of the other data types, you assign a sequence number only to the supplier master.

Data types appear alphabetically. If you do not want them in this order, you can assign sequence numbers so that they will appear in the order that you want.

To define CIF sequences

On CIF Sequence Revisions


01094 CIF Sequence Revisions
Tools Help
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URL Open
PDF Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
Resequence
Clear Screen

01094 CIF Sequence Revisions

Action Code: I
User ID:
or
User Class/Group: *APCLERK
Search Type: V

Seq	TY DT	Sch Typ	Data Type Description	Clss	Class Description
	BG	V	Billing Contact	A/P	Accounts Payable
	DA	V	Delivery Method	A/P	Accounts Payable
	SM	V	Supplier Master	A/P	Accounts Payable
	WY	V	Warranty	A/P	Accounts Payable

F8=Resequence F24=More Keys

1. Complete one of the following fields:
   - User ID
   - User Class/Group
2. Complete the following field:
   - Search Type
3. For each data type that you want to rearrange, complete the following field:
   - Sequence (Seq)
4. Press Enter.

Field	**Explanation**
User ID	The IBM-defined user profile.
User Class/Group	A profile used to classify users into groups for security purposes. Some rules for creating a User Class/Group are as follows: ▪ The 'Class/Group' profile must begin with * so that it does not conflict with any System profiles. ▪ The 'User Class/Group' field must be blank when entering a new group profile.

Field	Explanation
Seq	A number that reorders a group of records on the form. *Form-specific information* Use the following methodology when setting up supplementary data sequences: Type 10 next to the information you want first in the sequence, 20 for the next piece of information, and so on. You can sequence some or all of the supplemental data types available.

What You Should Know About

Resequencing	After you set up supplementary data sequences in the order that you want, you can resequence them. For example, if four data types are listed as 10, 15, 20, and 30, you can resequence them. The system will list them as 1,2,3,4. Resequencing makes your list neater.
The *All user preference	The *All user preference lets you move information from one search type to another.

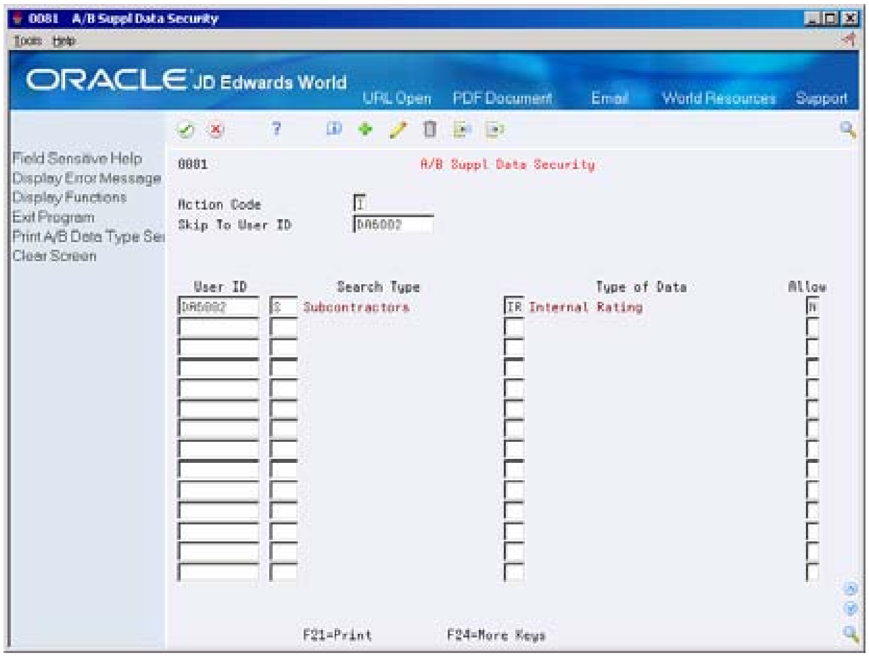
Defining Supplemental Data Security

From Address Book (G01), enter 27
From A/B Advanced and Technical Operations (G0131), choose CIF Supplemental Data
From CIF Supplemental Data (G01312), choose A/B Supplemental Data Security

You can restrict access to certain data types. For example, you might not want your accounts payable personnel to view customer master information. Even though the A/P search type is assigned to their user profile, you can still restrict their access to this information by defining supplemental data security.

To define supplemental data security

On A/B Supplemental Data Security


0081 A/B Suppl Data Security
Tools Help
ORACLE JD Edwards World
URL Open
PDF Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
Print A/B Data Type Se
Clear Screen
F21=Print
F24=More Keys

0081 A/B Suppl Data Security

Action Code: I

Skip To User ID: DA6002

User ID	Search Type		Type of Data		Allow
DA6002	S	Subcontractors	IR	Internal Rating	N

1. Complete the following field:
    - Skip to User ID
2. Complete the following fields:
    - User ID
    - Search Type
    - Type of Data
    - Allow
3. Press Enter.

Field	Explanation
Allow	A code that indicates whether a user is allowed access to the function key or selection. Valid codes are: Y Yes, allow access N No, prevent access blank Yes, allow access (default).

What You Should Know About

Setting up security on an exception basis	If most of your security is the same, you can designate *Public access and then set up users on an exception basis.

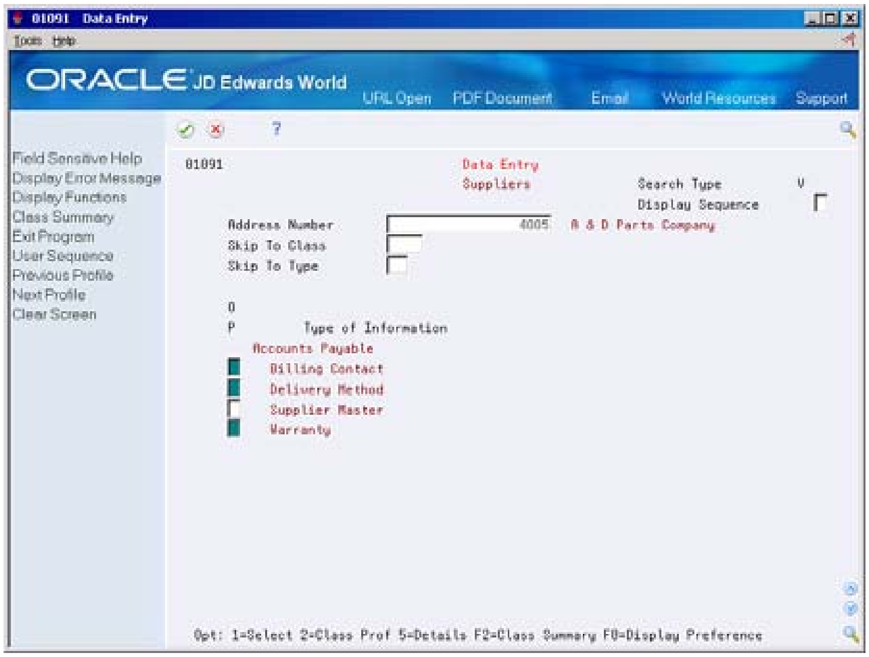
Enter and Copy Supplemental Data

Entering and Copying Supplemental Data

You can enter supplemental data for such things as notes, comments, plans, or other information that you want in an employee, customer, or supplier record. For example, you might want to enter notes in a customer record about an important meeting.

If the supplemental data applies to more than one record, you can copy the data into all of the records to which it applies. Entering and copying supplemental data consists of:

- Entering detailed supplemental information
- Copying detailed supplemental information
- Entering narrative text
- Copying narrative text


01091 Data Entry
Tools
Help
ORACLE JD Edwards World
URL Open
PDF Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Class Summary
Exit Program
User Sequence
Previous Profile
Next Profile
Clear Screen

```
01091                          Data Entry
                               Suppliers            Search Type        V
                                                    Display Sequence   ☐
    Address Number      4005  A & D Parts Company
    Skip To Class       ☐
    Skip To Type        ☐

    O
    P        Type of Information
       Accounts Payable
    ■    Billing Contact
    ■    Delivery Method
    ☐    Supplier Master
    ■    Warranty

 Opt: 1=Select 2=Class Prof 5=Details F2=Class Summary F0=Display Preference
```

Entering Detailed Supplemental Information

	From Address Book (G01), enter 27 From A/B Advanced and Technical Operations (G0131), choose **CIF Supplemental Data** From CIF Supplemental Data (G01312) choose **Data Entry**

When you want to enter notes in your employee, customer, or supplier records, enter detailed supplemental information. Supplemental information includes such things as a contact person and method of delivery.

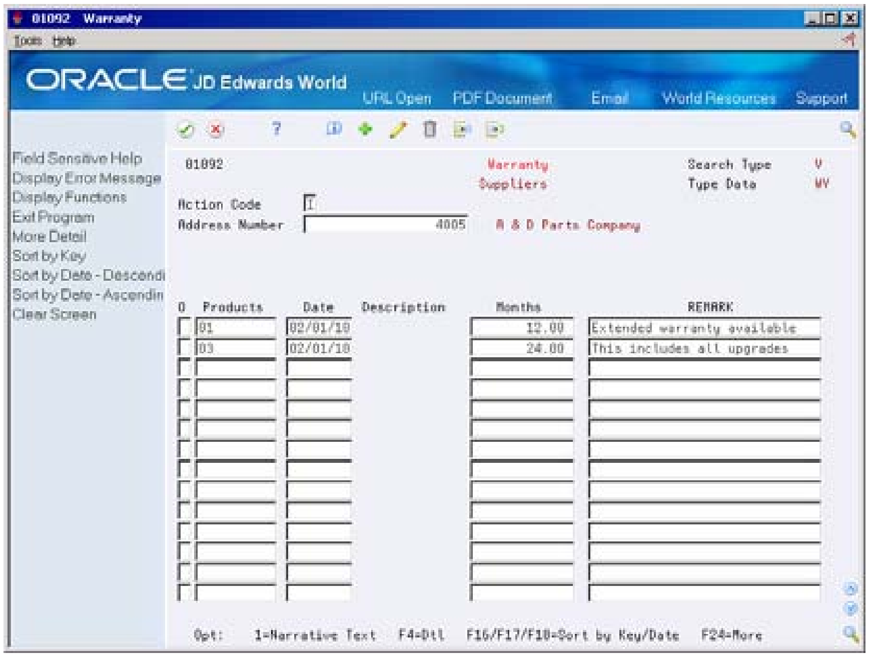
You can enter detailed supplemental information only for data types in the C (Code) mode.

To enter detailed supplemental information

On Data Entry

1. Complete the following fields:
   - Address Number
   - Skip to Class (optional)
   - Skip to Type (optional)
2. Next to a data type in the C mode, complete the following field:
   - Option

   The form that appears depends on the data type you choose.


01092 Warranty
Tools Help
ORACLE JD Edwards World
URL Open
PDF Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
More Detail
Sort by Key
Sort by Date - Descendi
Sort by Date - Ascendin
Clear Screen

01092 Warranty Suppliers

Search Type V

Type Data WV

Action Code I

Address Number 4005 A & D Parts Company

O	Products	Date	Description	Months	REMARK
	01	02/01/10		12.00	Extended warranty available
	03	02/01/10		24.00	This includes all upgrades

Opt: 1=Narrative Text F4=Dtl F16/F17/F18=Sort by Key/Date F24=More

3. On the form that appears, complete any entry fields as necessary.

Field	Explanation
Skip To Class	A user-defined code that identifies a group of data types in the Central Information File.
Skip To Type	Use this field to limit the display of data types.

Copying Detailed Supplemental Information

From Address Book (G01), enter 27
From A/B Advanced and Technical Operations (G0131), choose **CIF Supplemental Data**
From CIF Supplemental Data (G01312) choose **Data Entry**

Copying detailed supplemental information is useful when you want to assign the same information to multiple records. For example, you can assign the same sales quote to multiple customers.

You can copy detailed supplemental information only for data types in the C (Code) mode.

To copy detailed supplemental information

On Data Entry

1. Locate an address record with the appropriate data type.
2. Select a data type.

   The form that appears depends on the data type you choose.
3. On the form that appears, complete the following field for the address number to which you want to copy the data type:
   - Address Number
4. Press Enter.

Field	Explanation
Address Number	A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, and any other Address Book members.

Entering Narrative Text

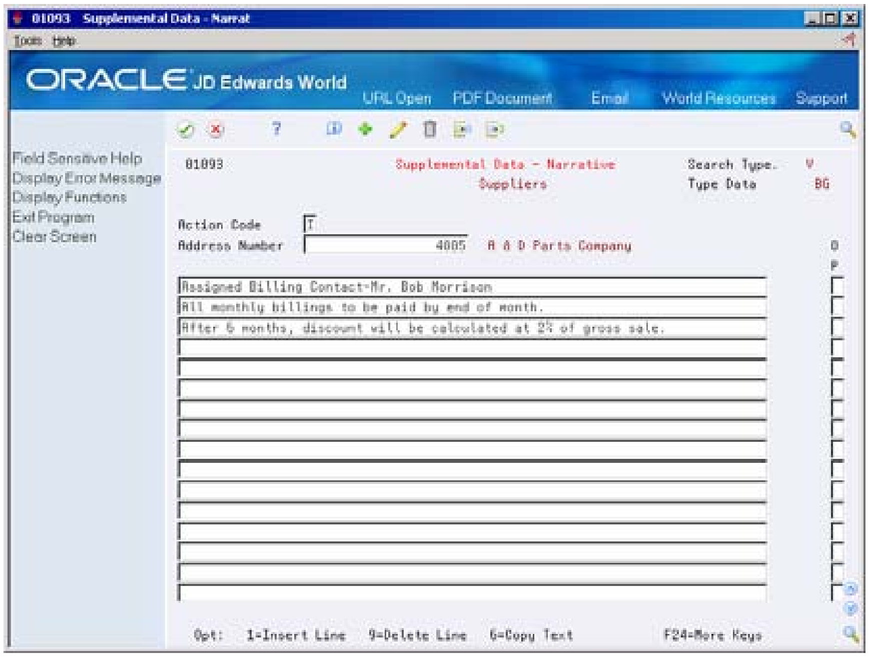
	From Address Book (G01), enter 27 From A/B Advanced and Technical Operations (G0131), choose **CIF Supplemental Data** From CIF Supplemental Data (G01312) choose **Data Entry**

Enter narrative text to record additional information about an address or data type.

To enter narrative text

On Data Entry

1. Complete the following field:
   - Address Number
2. Complete the following field to access Supplemental Data - Narrative:
   - Option


01093 Supplemental Data - Narrat
Tools Help
ORACLE JD Edwards World
URL Open
PDF Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
Clear Screen
O
P

01093 Supplemental Data - Narrative
Suppliers
Search Type. V
Type Data BG

Action Code I
Address Number 4005 A & D Parts Company

Assigned Billing Contact-Mr. Bob Morrison
All monthly billings to be paid by end of month.
After 6 months, discount will be calculated at 2% of gross sale.

Opt: 1=Insert Line 9=Delete Line 6=Copy Text F24=More Keys

3. On Supplemental Data - Narrative, enter narrative text.

Copying Narrative Text

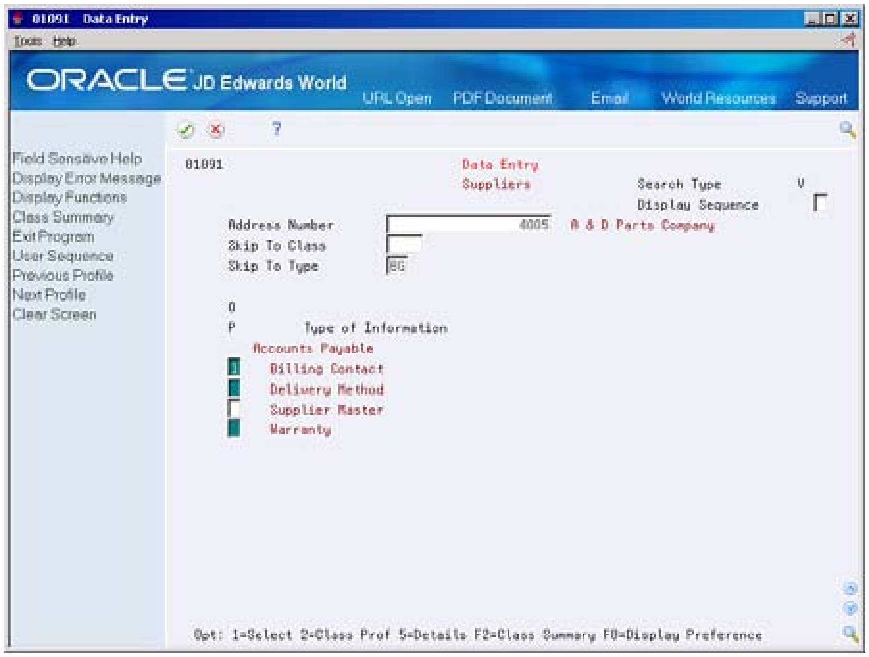
From Address Book (G01), enter 27
From A/B Advanced and Technical Operations (G0131), choose **CIF Supplemental Data**
From CIF Supplemental Data (G01312) choose **Data Entry**

Copy narrative text whenever the information you have entered applies to multiple customers, suppliers, prospects, or other address numbers.

To copy narrative text

On Data Entry

1. Complete the following field:
   - Address Number
2. Complete the following field next to the narrative type that applies to the text to be copied:
   - Option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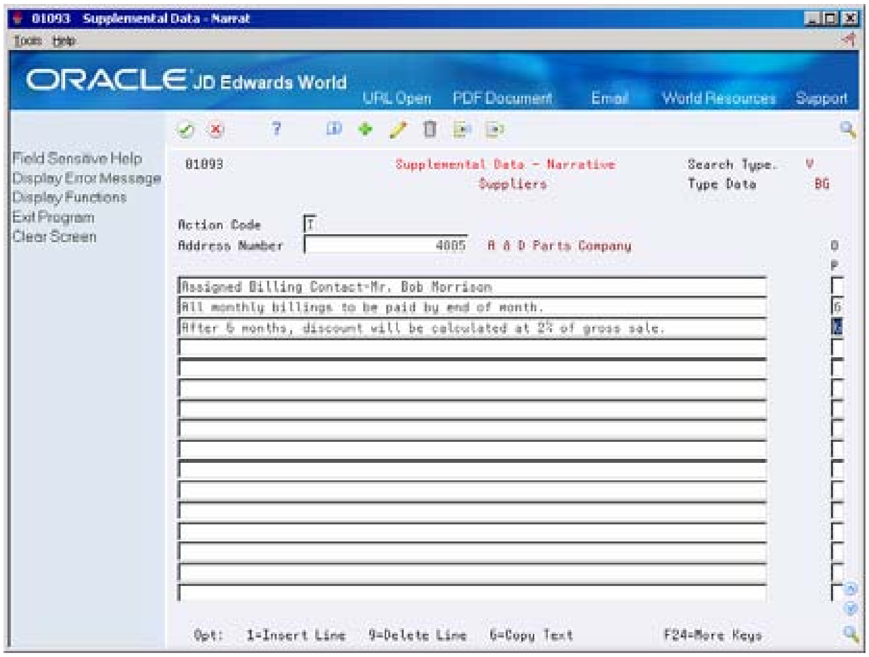
Field Sensitive Help
Display Error Message
Display Functions
Class Summary
Exit Program
User Sequence
Previous Profile
Next Profile
Clear Screen

```
01091                          Data Entry
                               Suppliers          Search Type        V
                                                  Display Sequence
     Address Number        4005  A & D Parts Company
     Skip To Class
     Skip To Type          BG

     O
     P        Type of Information
       Accounts Payable
     1   Billing Contact
         Delivery Method
         Supplier Master
         Warranty

  Opt: 1=Select 2=Class Prof 5=Details F2=Class Summary F0=Display Preference
```

3. On Supplemental Data - Narrative, for every line of text to be copied, complete the following field:
   - Option


01093 Supplemental Data - Narrat
Tools Help
ORACLE JD Edwards World
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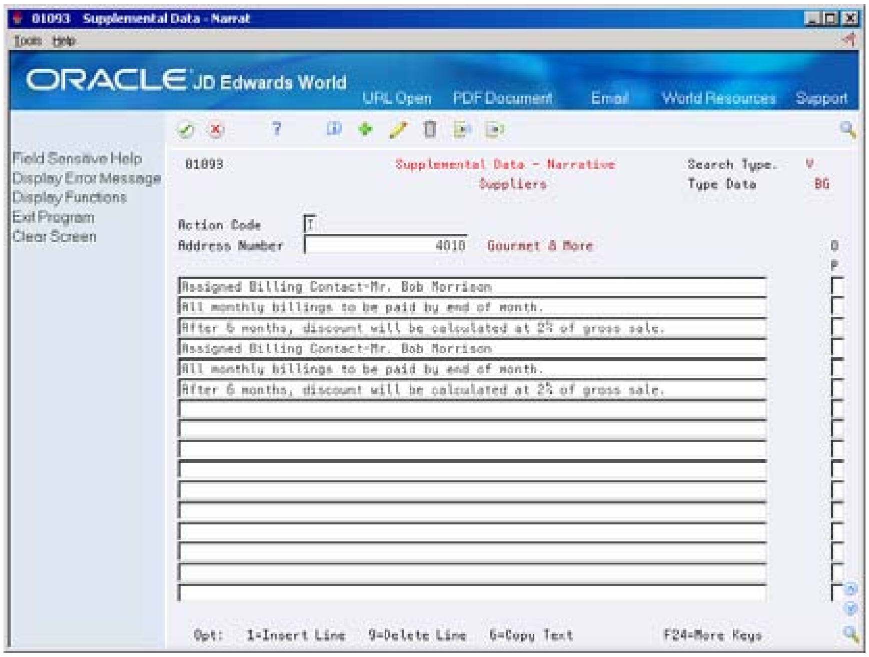
PDF Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
Clear Screen

```
01093          Supplemental Data - Narrative        Search Type.   V
                          Suppliers                 Type Data      BG

Action Code      I
Address Number            4005   A & D Parts Company                O
                                                                    P
Assigned Billing Contact-Mr. Bob Morrison
All monthly billings to be paid by end of month.                    6
After 6 months, discount will be calculated at 2% of gross sale.

  Opt:  1=Insert Line   9=Delete Line   6=Copy Text        F24=More Keys
```

4. Complete the following field for the destination address and select the Add option:

   - Address Number

   A second window appears with the existing text for the data type you entered.


01093 Supplemental Data - Narrat
Tools Help
ORACLE JD Edwards World
URL Open
PDF Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
Clear Screen

```
01093          Supplemental Data - Narrative        Search Type.   V
                          Suppliers                 Type Data      BG

Action Code      I
Address Number            4010   Gourmet & More                     O
                                                                    P
Assigned Billing Contact-Mr. Bob Morrison
All monthly billings to be paid by end of month.
After 6 months, discount will be calculated at 2% of gross sale.
Assigned Billing Contact-Mr. Bob Morrison
All monthly billings to be paid by end of month.
After 6 months, discount will be calculated at 2% of gross sale.

  Opt:  1=Insert Line   9=Delete Line   6=Copy Text        F24=More Keys
```

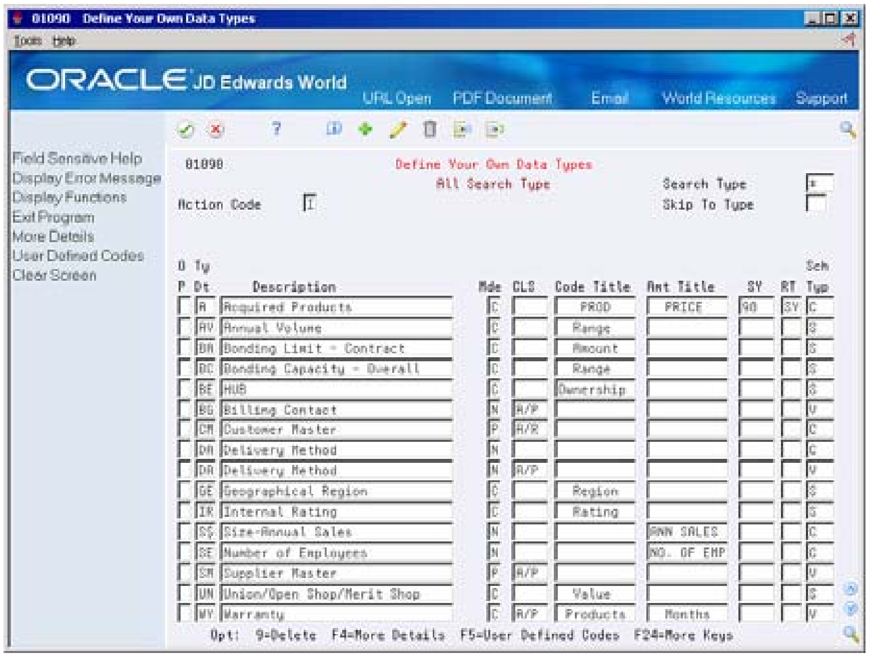
Change Data Types

Changing Data Types

You can change data types. For example, you might want to change the percentage discount you offer a customer and enter a note about the change in their customer record.

Changing data types consists of:

- Changing Code and Narrative Data Types
- Changing Program Data Types



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Tools
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Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
More Details
User Defined Codes
Clear Screen

01090 Define Your Own Data Types

All Search Type

Action Code I

Search Type *

Skip To Type

O P	Ty Dt	Description	Mde	CLS	Code Title	Amt Title	SY	RT	Sch Typ
	A	Acquired Products	C		PROD	PRICE	90	SY	C
	AV	Annual Volume	C		Range				S
	BA	Bonding Limit - Contract	C		Amount				S
	BC	Bonding Capacity - Overall	C		Range				S
	BE	HUB	C		Ownership				S
	BG	Billing Contact	N	A/P					V
	CM	Customer Master	P	A/R					C
	DA	Delivery Method	N						C
	DR	Delivery Method	N	A/P					V
	GE	Geographical Region	C		Region				S
	IR	Internal Rating	C		Rating				S
	S$	Size-Annual Sales	N			ANN SALES			C
	SE	Number of Employees	N			NO. OF EMP			C
	SM	Supplier Master	P	A/P					V
	UN	Union/Open Shop/Merit Shop	C		Value				S
	WY	Warranty	C	A/P	Products	Months			V

Opt: 9=Delete F4=More Details F5=User Defined Codes F24=More Keys

Changing Code and Narrative Data Types

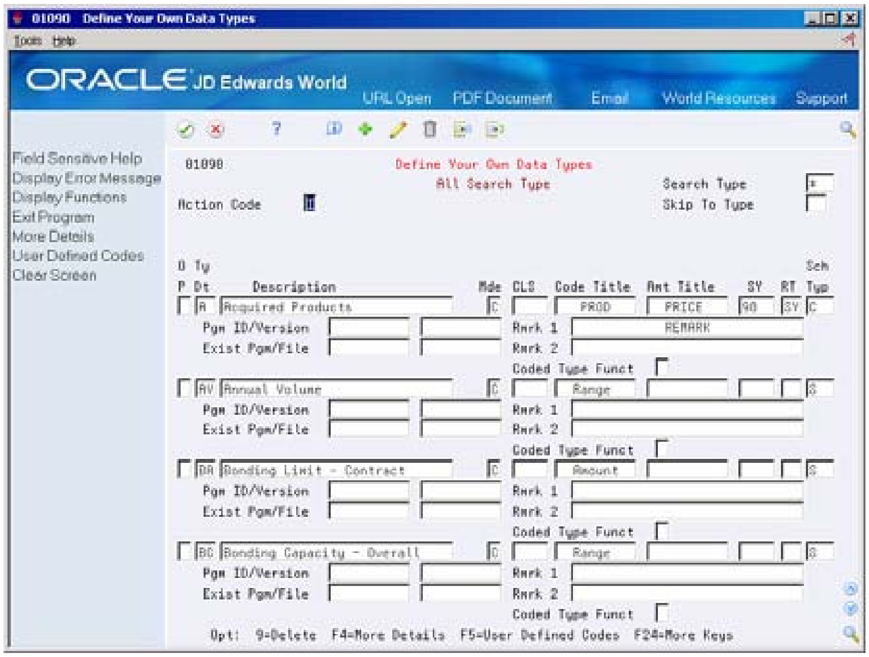
	From Address Book (G01), enter 27 From A/B Advanced and Technical Operations (G0131), choose **CIF Supplemental Data** From CIF Supplemental Data (G01312), choose **Define Your Own Data Types**

When you want to change information about a customer, employee, a group of people or any other user defined code, change the data type.

To change code and narrative data types

On Define Your Own Data Types

1. Complete the following fields:
   - Description
   - Mode
   - Search Type
2. Complete the following optional fields:
   - Classification
   - Code Title
   - Amount Title
3. If the data type refers to a user defined code list, complete the following fields:
   - System
   - Reporting Type
4. Access the detail area (F4).


01090 Define Your Own Data Types
Tools Help
ORACLE JD Edwards World
URL Open
PDF Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
More Details
User Defined Codes
Clear Screen

```
01090                   Define Your Own Data Types
                              All Search Type                Search Type   *
Action Code    I                                             Skip To Type

O Ty                                                                          Sch
P Dt      Description              Mde  CLS  Code Title  Amt Title   SY   RT  Typ
  A   Acquired Products             C          PROD        PRICE     90   SY  C
      Pgm ID/Version                    Rmrk 1           REMARK
      Exist Pgm/File                    Rmrk 2
                                        Coded Type Funct
  AV  Annual Volume                 C          Range                          S
      Pgm ID/Version                    Rmrk 1
      Exist Pgm/File                    Rmrk 2
                                        Coded Type Funct
  BA  Bonding Limit - Contract      C          Amount                         S
      Pgm ID/Version                    Rmrk 1
      Exist Pgm/File                    Rmrk 2
                                        Coded Type Funct
  BC  Bonding Capacity - Overall    C          Range                          S
      Pgm ID/Version                    Rmrk 1
      Exist Pgm/File                    Rmrk 2
                                        Coded Type Funct
     Opt:  9=Delete  F4=More Details  F5=User Defined Codes  F24=More Keys
```

5. Complete the following optional fields:
   - Remark 1
   - Remark 2
6. If the data type contains amounts rather than values, complete the following field:
   - Coded Type Function
7. Use the Change action.

What You Should Know About

Changing the search type	When you change only the search type, the system retains the original data type and adds the additional one.

Changing Program Data Types

From Address Book (G01), enter 27
From A/B Advanced and Technical Operations (G0131), choose **CIF Supplemental Data**
From CIF Supplemental Data (G01312), choose **Define Your Own Data Types**

You might need to change the program exit currently defined for the data type. For example, if you want to exit to Supplier Master Information from Supplemental Data Entry, you can change the program data type to exit to that program.

To change program data types

On Define Your Own Data Types

1. Access the detail area (F4).
2. Complete the following fields:
   - Program ID
   - Version
   - Existing Program
   - File
3. Use the Change action.

Processing Options

See Define Type of Data - CORE (P01090).

View Supplemental Data

Viewing Supplemental Data

You can view detailed information about an address or data type. For example, you can determine when payments are due from a customer or the name of your contact person at a particular company.

Viewing supplemental data consists of:

- Viewing Data by Address
- Viewing Data by Data Type

Before You Begin

- Set up supplemental data security, if applicable

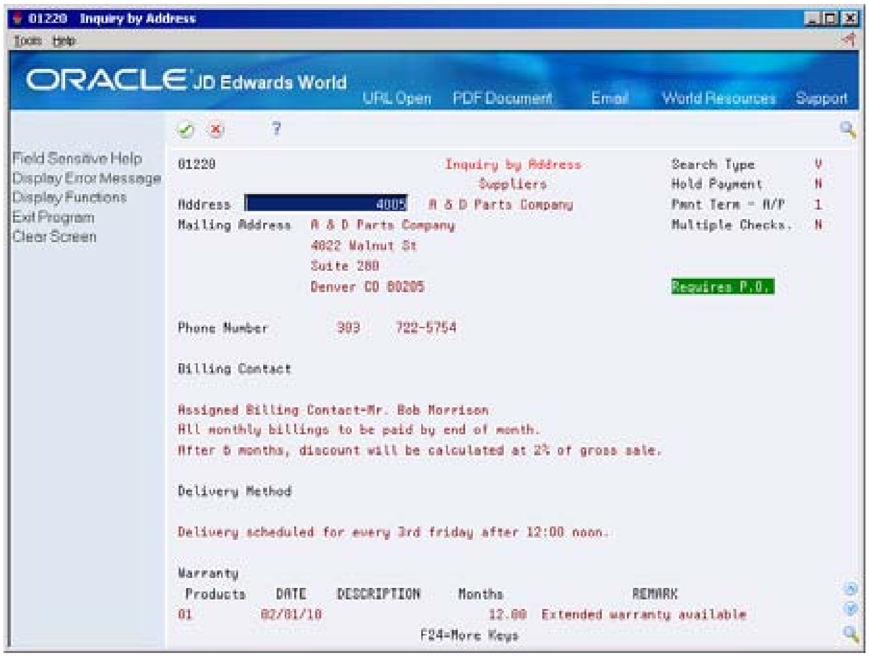
Viewing Data by Address

From Address Book (G01), enter 27
From A/B Advanced and Technical Operations (G0131), choose **CIF Supplemental Data**
From CIF Supplemental Data (G01312), choose **Inquiry by Address**

You can view data such as your billing contact and the method of delivery that you designated for a company.

To view data by address

On Inquiry by Address


01220 Inquiry by Address
Tools Help
ORACLE JD Edwards World
URL Open
PDF Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
Clear Screen

```
01220                           Inquiry by Address              Search Type       V
                                     Suppliers                  Hold Payment      N
Address              4005   A & D Parts Company                 Pmnt Term - A/P   1
Mailing Address   A & D Parts Company                           Multiple Checks.  N
                  4022 Walnut St
                  Suite 200
                  Denver CO 80205                               Requires P.O.

Phone Number         303    722-5754

Billing Contact

Assigned Billing Contact-Mr. Bob Morrison
All monthly billings to be paid by end of month.
After 6 months, discount will be calculated at 2% of gross sale.

Delivery Method

Delivery scheduled for every 3rd friday after 12:00 noon.

Warranty
 Products    DATE     DESCRIPTION     Months                 REMARK
01          02/01/10                         12.00  Extended warranty available
                                F24=More Keys
```

Complete the following field:

- Address

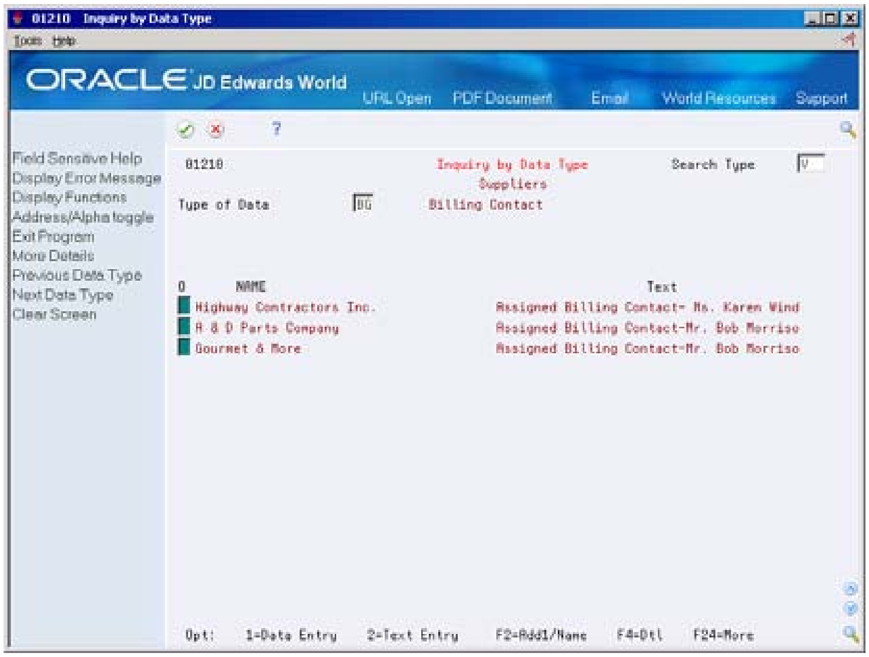
Viewing Data by Data Type

From Address Book (G01), enter 27
From A/B Advanced and Technical Operations (G0131), choose **CIF Supplemental Data**
From CIF Supplemental Data (G01312), choose **Inquiry by Data Type**

You can view such data as the address and narrative text that you assigned to a company.

To view data by data type

On Inquiry by Data Type


01210 Inquiry by Data Type
Tools Help
ORACLE JD Edwards World
URL Open
PDF Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Address/Alpha toggle
Exit Program
More Details
Previous Data Type
Next Data Type
Clear Screen

```
01210                      Inquiry by Data Type           Search Type   V
                                  Suppliers
Type of Data          BG       Billing Contact


0       NAME                                          Text
   Highway Contractors Inc.               Assigned Billing Contact- Ms. Karen Wind
   A & D Parts Company                    Assigned Billing Contact-Mr. Bob Morriso
   Gourmet & More                         Assigned Billing Contact-Mr. Bob Morriso

Opt:   1=Data Entry   2=Text Entry    F2=Add1/Name   F4=Dtl   F24=More
```

1. Complete the following field:
   - Type of Data
2. For C (code) data types, limit your selection by completing the following field:
   - Skip to Value

What You Should Know About

Alternate format	Choose Address 1 / Name to toggle between address line # 1 and the mailing name.

Work with Supplemental Data Reports

Working with Supplemental Data Reports

You must build a worktable before you can print supplemental data reports. Supplemental data reports are useful when you want to review the data in your supplemental database.

These reports summarize data stored in the following tables:

- Supplemental Database - Core (F01090)
- Supplemental Database - Code (F01092)
- Supplemental Database - Narrative (F01093)

Working with supplemental data reports consists of:

- Creating a Worktable
- Printing Supplemental Data Reports

Before You Begin

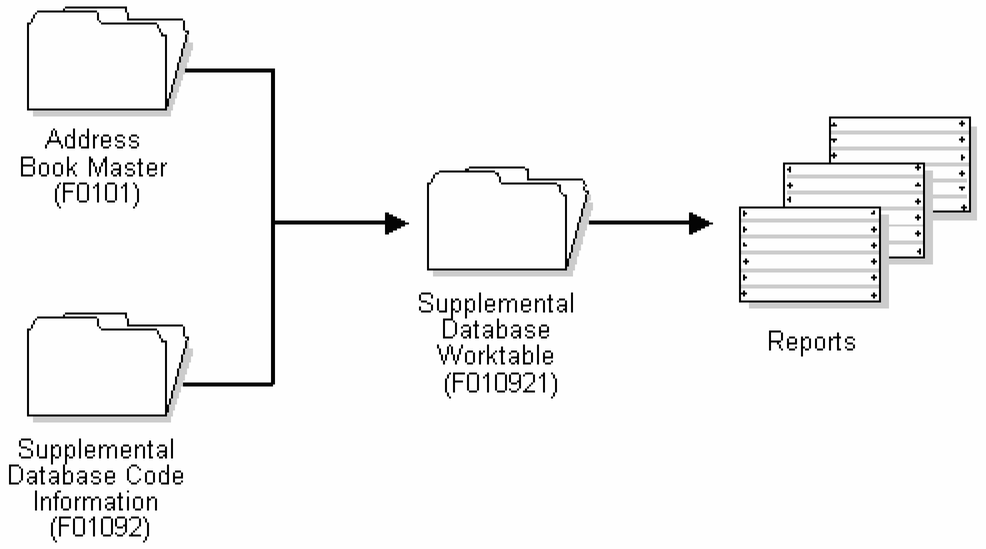
- Verify that you have information stored in CIF

Creating a Worktable

From Address Book (G01), enter 27
From A/B Advanced and Technical Operations (G0131), choose **CIF Supplemental Data**
From CIF Supplemental Data (G01312), choose **Work File Build**

Before you can print supplemental data reports, you must use Work Table Build to build a worktable that contains address book data.

The supplemental data that exists in your worktable comes from data stored in the Address Book Master and in the Supplemental Database tables. This supplemental data is the basis for your reports.


Address
Book Master
(F0101)
Supplemental
Database Code
Information
(F01092)
Supplemental
Database
Worktable
(F010921)
Reports

Processing Options

See Supplemental Data Work File Build (P01460).

Printing Supplemental Data Reports

To view a printed version of your supplemental data, you can:

- Print the Data by Data Type report
- Print the Data by Address Book report

These are DREAM Writer reports. In addition to using DREAM Writer to create these reports, you can use the World Writer and World Vista reporting programs.

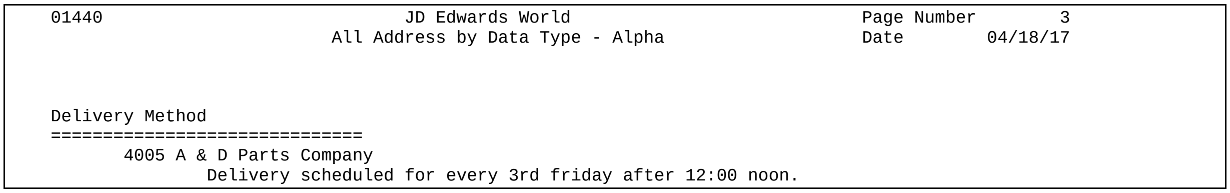
See Also

- *World Writer Reference Guide*
- *World Vista Reference Guide*

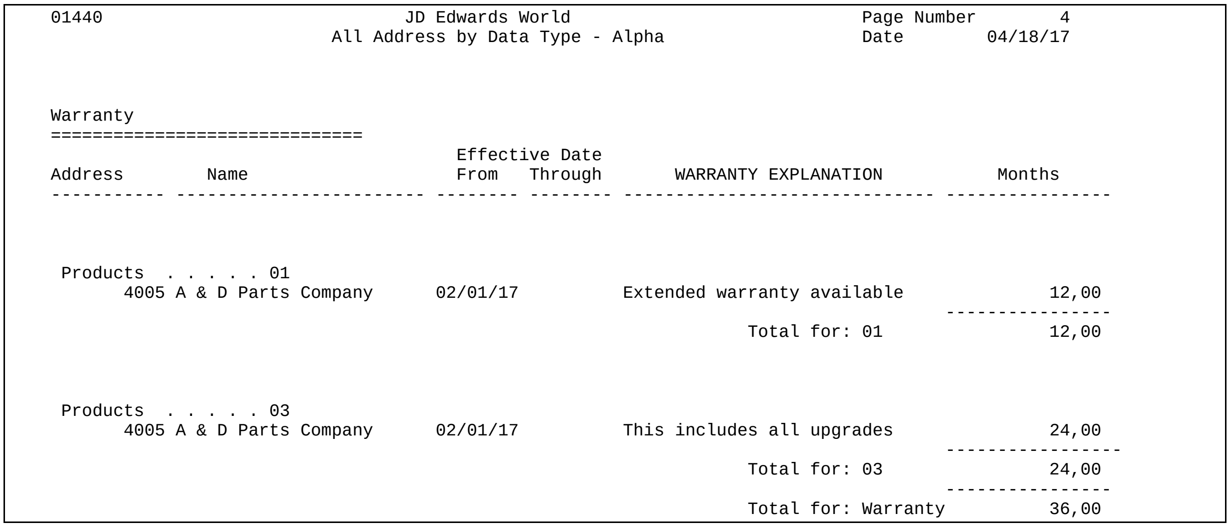
Printing Data by Data Type Report

From Address Book (G01), enter 27
From A/B Advanced and Technical Operations (G0131), choose **CIF Supplemental Data**
From CIF Supplemental Data (G01312), choose **Data by Data Type**

```
01440                             JD Edwards World                            Page Number         2
                           All Address by Data Type - Alpha                   Date        04/18/17



Billing Contact
==============================
       4005 A & D Parts Company
               Assigned Billing Contact-Mr. Bob Morrison
               All monthly billings to be paid by end of month.
               After 6 months, discount will be calculated at 2% of gross sale.
```



```
01440                         JD Edwards World                           Page Number        3
                       All Address by Data Type - Alpha                  Date        04/18/17



Delivery Method
==============================
       4005 A & D Parts Company
               Delivery scheduled for every 3rd friday after 12:00 noon.
```



```
01440                         JD Edwards World                           Page Number        4
                       All Address by Data Type - Alpha                  Date        04/18/17



Warranty
==============================
                                        Effective Date
Address        Name                     From   Through       WARRANTY EXPLANATION          Months
----------- ------------------------ -------- -------- ------------------------------ ----------------



 Products  . . . . . 01
       4005 A & D Parts Company      02/01/17          Extended warranty available              12,00
                                                                                      ----------------
                                                                   Total for: 01                 12,00



 Products  . . . . . 03
       4005 A & D Parts Company      02/01/17          This includes all upgrades               24,00
                                                                                      -----------------
                                                                   Total for: 03                 24,00
                                                                                      ----------------
                                                                   Total for: Warranty           36,00
```

Processing Options

See Address by Data Type (P01440).

Data Sequence for Data by Data Type Report

You must sequence your data in one of two ways:

- All addresses for a record type
- All information for a record type by address

All Addresses for a Record Type

To print all addresses for a specific record type (for example, all addresses with professional licenses, listed by license), use the following sequence:

1. Type Data - Total Level 02
2. User Defined Code - Total Level 01
3. Address Number
4. Effective Date
5. Line Number

To print record types in alphabetical order, use the following sequence:

1. Type Data - Total Level 02
2. User Defined Code - Total Level 01

3. Alpha Name
4. Address Number
5. Effective Date
6. Line Number

All Information for a Record Type by Address

To print all information for a specific record type by address (for example, licenses held by addresses, listed by address or address emergency contacts), use the following sequence:

1. Type Data - Total Level 02
2. Address Number - Total Level 01
3. User Defined Code
4. Effective Date
5. Line Number

To print record types in alphabetical order, use the following sequence:

1. Type Data - Total Level 02
2. Alpha Name - Total Level 01
3. Address Number
4. User Defined Code
5. Effective Date
6. Line Number

Printing the Data by Address Book Report

From Address Book (G01), enter 27
From A/B Advanced and Technical Operations (G0131), choose CIF Supplemental Data
From CIF Supplemental Data (G01312), choose Data by Address Book

```
01450                                           JD Edwards World                             Page Number        2
                                          Supplemental Data - by Address                     Date        04/18/17



Address Number . . .     4005 A & D Parts Company
Mailing Address. . . A & D Parts Company                Hold Invoices. . .         Search Type. . V   Suppliers
                     3080 Walnut St                     Hold Payment . . .   N     Location . . . DEN Denver Branch
                     Denver CO 80205                    Payment Terms - A/R        Credit Message
                                                        Payment Terms - A/P        Temp Cr. Msg .
Phone Number . . . . ( 303 )  722-5754                  Multiple Payments.   N     Credit Limit . . .

Billing Contact
==============================
               Assigned Billing Contact-Mr. Bob Morrison
               All monthly billings to be paid by end of month.
               After 6 months, discount will be calculated at 2% of gross sale.




Delivery Method
==============================
               Delivery scheduled for every 3rd friday after 12:00 noon.




Warranty
==============================
                 Effective
   Products    From   Through       WARRANTY EXPLANATION                                       Months
  ---------- -------- -------- ------------------------------                                ---------------------
  01        02/01/17         Extended warranty available                                                  12,00
  Copiers
  03        02/01/17         This includes all upgrades                                                   24,00
  Personal Computers
                                                                                             ---------------------
                                                                                   Total                    36,00
```

Processing Options

See Supplemental Data (P01450).

Data Sequence for Data by Address Book Report

You must sequence your data to produce accurate results. To print all addresses in address order, use the following sequence:

1. Address Number
2. Type Data
3. User Defined Code
4. Effective Date
5. Line Number

To print all addresses in alphabetical order, use the following sequence:

1. Alpha Name
2. Address Number
3. Type Data
4. User Defined Code
5. Effective Date
6. Line Number

8 Address Batch Processing

Overview to Address Batch Processing

Objectives

- To add and revise address information for batch processing
- To add accounts payable and accounts receivable information for batch processing

About Address Batch Processing

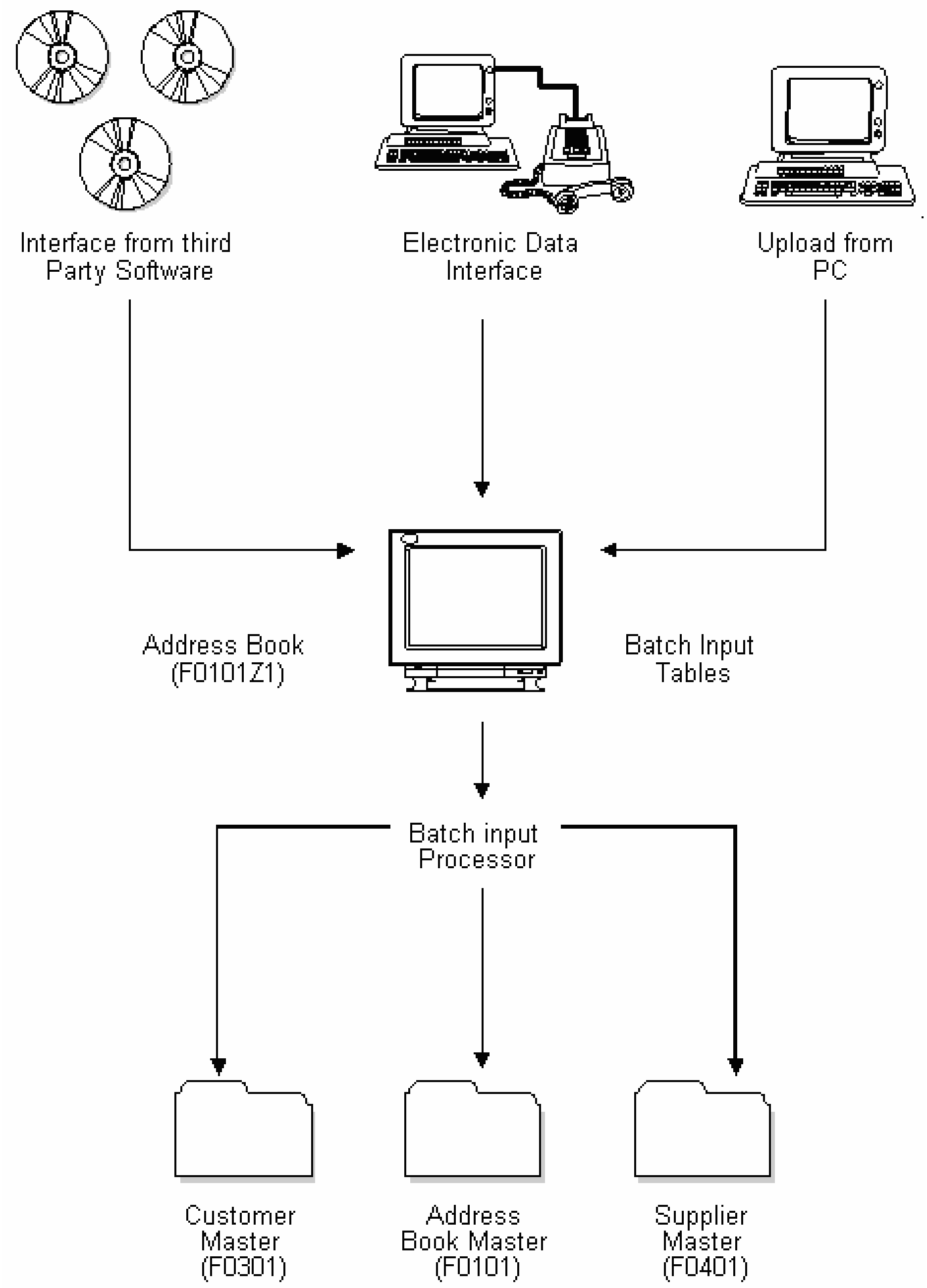
You can transfer address batches from an outside source, such as a personal computer, a third-party or custom system, or Electronic Data Interchange (EDI). To do so, you use the address batch process to convert those address batches into JD Edwards World batches.

During processing, the system creates JD Edwards World records in the Address Book Master table (F0101) and the associated tables for addresses, phone numbers and Who's Who information. If you are working with accounts receivable or accounts payable, the system also creates JD Edwards World records in the Customer Master (F0301) and Supplier Master (F0401) tables, respectively. The transferred address batches remain in the Address Book Batch Input table (F0101Z1) until you process and purge the batch. The system produces an error report listing batches it cannot process.

Address batch processing consists of the following tasks:

- Reviewing address batches
- Working with address batches
- Processing address batches
- Purging address batches

The following graphic shows the address batch process.


Interface from third Party Software
Electronic Data Interface
Upload from PC
Address Book (F0101Z1)
Batch Input Tables
Batch input Processor
Customer Master (F0301)
Address Book Master (F0101)
Supplier Master (F0401)

Review Address Batches

Reviewing Address Batches

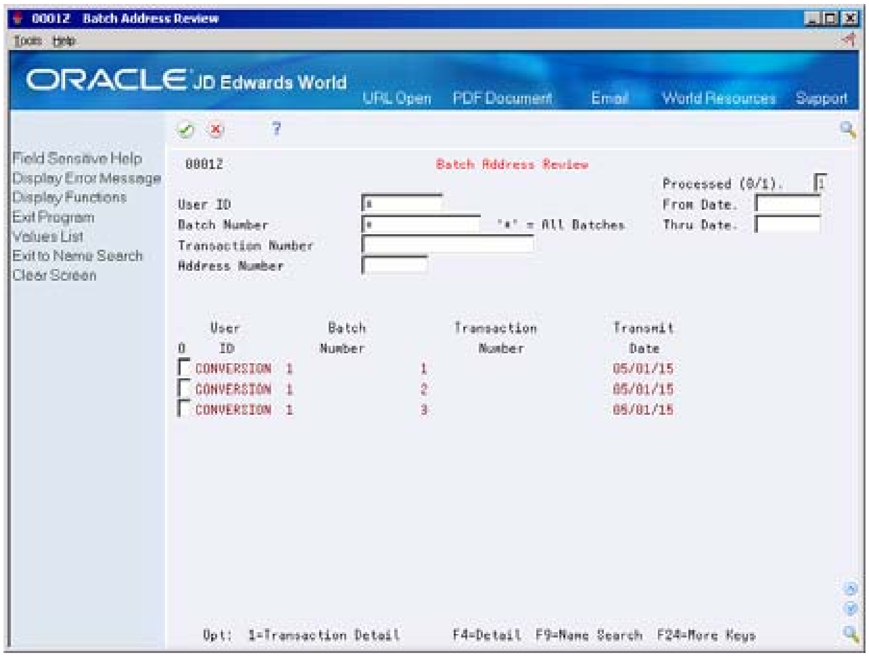
Before and after converting your addresses, you must review them and make any necessary corrections. In certain custom conversions, you might need to manually correct the information in some fields after the address batches are converted, but before they are processed into the address book tables.

Reviewing address batches consists of:

- Reviewing Addresses
- Reviewing Transaction Detail

Before You Begin

- Verify that you have transactions in the Address Book Batch Input table (F0101Z1). This temporary table contains the addresses to be converted.


00012 Batch Address Review
Tools Help
ORACLE JD Edwards World
URL Open
PDF Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
Values List
Exit to Name Search
Clear Screen

```
00012                          Batch Address Review
                                                          Processed (0/1).  1
User ID                  *                                From Date.
Batch Number             *              '*' = All Batches Thru Date.
Transaction Number
Address Number


     User       Batch        Transaction      Transmit
0     ID        Number          Number          Date
  CONVERSION  1           1                   05/01/15
  CONVERSION  1           2                   05/01/15
  CONVERSION  1           3                   05/01/15

   Opt:  1=Transaction Detail      F4=Detail  F9=Name Search  F24=More Keys
```

See Also

- *Entering Address Book Records (P01051)*

Reviewing Addresses

From Address Book (G01), enter 27
From A/B Advanced and Technical Operations (G0131), choose **Batch Address Processing**
From Batch Address Processing (G01313), choose **Batch Address Review**

To ensure that your addresses are correct, review them both before and after processing them.

To review addresses

On Batch Address Review

1. Locate the addresses that you want to review.
2. To limit the addresses displayed, complete any of the following fields:
    - User ID
    - Batch Number
    - Transaction Number
    - Address Number

Field	Explanation
User ID	The source of the transaction. This can be a user ID, a workstation, the address of an external system, a node on a network, and so on. This field helps identify both the transaction and its point of origin.
Batch Number	The number that the transmitter assigns to the batch. During batch processing, the system assigns a new batch number to the JD Edwards World transactions for each control (user) batch number it finds.
Transaction Number	This is the number that an Electronic Data Interchange (EDI) transmitter assigns to a transaction. In a non-EDI environment, you can assign any number that is meaningful to you to identify a transaction within a batch. It can be the same as a JD Edwards World document number.
Address Number	A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, and any other Address Book members.

Reviewing Transaction Detail

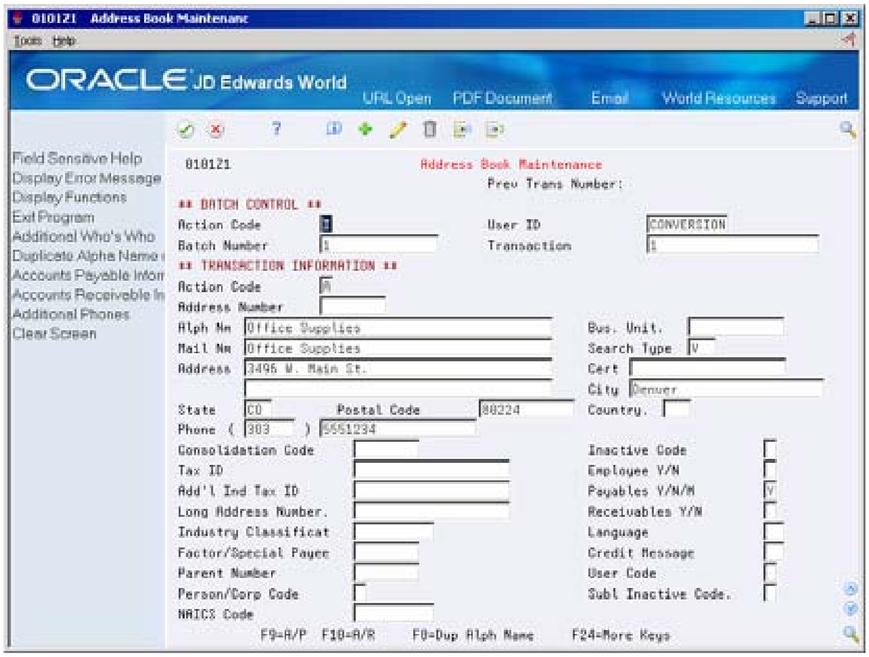
From Address Book (G01), enter 27
From A/B Advanced and Technical Operations (G0131), choose **Batch Address Processing**
From Batch Address Processing (G01313), choose **Batch Address Review**

The transaction detail is retrieved from an outside source and held in a temporary table until you upload the data into the Address Book Master table. Review the transaction detail to ensure that the data you upload is correct. For example, you might want to ensure that the correct transaction number corresponds to a particular user ID or that you did not right-justify the information in a field when you intended to left-justify it.

To review transaction detail

On Batch Address Review

1. Choose Transaction Detail.


010121 Address Book Maintenanc
Tools Help
ORACLE JD Edwards World
URL Open
PDF Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
Additional Who's Who
Duplicate Alpha Name
Accounts Payable Infor
Accounts Receivable In
Additional Phones
Clear Screen

010121 Address Book Maintenance
Prev Trans Number:

** BATCH CONTROL **
Action Code
Batch Number 1
User ID CONVERSION
Transaction 1

** TRANSACTION INFORMATION **
Action Code A
Address Number
Alph Nm Office Supplies
Mail Nm Office Supplies
Address 3496 W. Main St.
Bus. Unit.
Search Type V
Cert
City Denver
State CO
Postal Code 80224
Country.
Phone (303) 5551234
Consolidation Code
Tax ID
Add'l Ind Tax ID
Long Address Number.
Industry Classificat
Factor/Special Payee
Parent Number
Person/Corp Code
NAICS Code
Inactive Code
Employee Y/N
Payables Y/N/M V
Receivables Y/N
Language
Credit Message
User Code
Subl Inactive Code.

F9=A/P F10=A/R F0=Dup Alph Name F24=More Keys

2. On Address Book Maintenance, view the transaction detail to ensure that the uploaded data is correct.

Processing Options

See Address Book Batch Maintenance (P0101Z1).

Work with Address Batches

Working with Address Batches

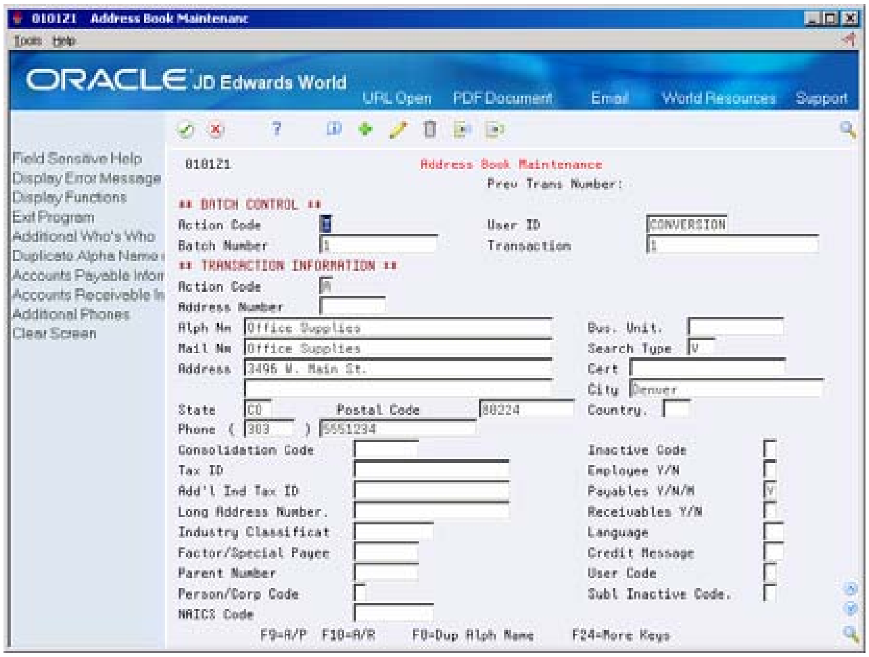
You work with address batches to make additions, corrections, or deletions to existing address batches.

Working with address batches consists of:

- Adding Address Records to Batches
- Revising Batch Address Records

Before You Begin

- Convert the address information in the Address Book Batch Input table (F0101Z1)


010121 Address Book Maintenanc
Tools Help
ORACLE JD Edwards World
URL Open
PDF Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
Additional Who's Who
Duplicate Alpha Name
Accounts Payable Infor
Accounts Receivable In
Additional Phones
Clear Screen

010121 Address Book Maintenance
Prev Trans Number:

** BATCH CONTROL **
Action Code
Batch Number 1
User ID CONVERSION
Transaction 1

** TRANSACTION INFORMATION **
Action Code A
Address Number
Alph Nm Office Supplies
Mail Nm Office Supplies
Address 3496 W. Main St.
State CO
Postal Code 80224
Phone (303) 5551234
Bus. Unit.
Search Type V
Cert
City Denver
Country.
Consolidation Code
Tax ID
Add'l Ind Tax ID
Long Address Number.
Industry Classificat
Factor/Special Payee
Parent Number
Person/Corp Code
NAICS Code
Inactive Code
Employee Y/N
Payables Y/N/M Y
Receivables Y/N
Language
Credit Message
User Code
Subl Inactive Code.

F9=A/P F10=A/R F0=Dup Alph Name F24=More Keys

What You Should Know About

Processed addresses	The system highlights processed addresses on Batch Address Revisions.

Adding Address Records to Batches

	From Address Book (G01), enter 27 From A/B Advanced and Technical Operations (G0131), choose **Batch Address Processing** From Batch Address Processing (G01313), choose **Batch Address Revisions**

You can add new data to an existing address batch.

Adding address batch information consists of:

- Adding a general address record to a batch
- Adding a customer master record to a batch
- Adding a supplier master record to a batch
- Adding Who's Who contacts to a general address record
- Adding phone numbers to a general address record

What You Should Know About

Processed address book records	Once address book records have been processed, changes and deletions must be done on Address Book Revisions.
Address batch information for the customer master and supplier master	Processed address batch information is stored in the Address Book Master (F0101), Customer Master (F0301), and Supplier Master (F0401) tables.

To add a general address record to a batch

On Batch Address Revisions

1. To uniquely identify a batch, complete the following key fields:
    - User ID
    - Batch Number
    - Transaction
2. Complete the following transaction information fields:
    - Address Number (optional)
    - Alpha Name
    - Mailing Name
    - Search Type
    - State
    - Country
3. Complete any of the additional information fields. Use the appropriate function to access phone numbers (F12) or Who's Who contacts (F5).

To add a customer master record to a batch

On Batch Address Revisions

1. To uniquely identify a batch, complete the following key fields:
   - User ID
   - Batch Number
   - Transaction
2. Complete the following transaction information fields:
   - Address Number
   - Alpha Name
   - Mailing Name
   - Search Type
   - Receivables
3. Use the Accounts Receivable function (F10), if necessary.
4. Complete any of the receivables information fields.
5. Press Enter.

To add a supplier master record to a batch

On Batch Address Revisions

1. To uniquely identify a batch, complete the following key fields:
   - User ID
   - Batch Number
   - Transaction
2. Complete the following transaction information fields:
   - Address Number
   - Alpha Name
   - Mailing Name
   - Search Type
   - Payables
3. Choose the Accounts Payable function (F9), if necessary.
4. Complete any of the payables information fields.
5. Press Enter.

Field	Explanation
Address Number	A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, and any other Address Book members. *Form-specific information* Before uploading your address batches, you might want to assign an address number to correspond with the number from a prior system. If you do not pre-assign a number, the system assigns one through Next Numbers.
Name - Alpha	The 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.
Mail Nm	The company or person to whom billing or correspondence is addressed.
Search Type	A user defined code (01/ST) that identifies the kind of address book record you want the system to select when you search for a name or message. For example: E Employees X Ex-employees V Suppliers C Customers P Prospects M Mail distribution lists

Revising Batch Address Records

From Address Book (G01), enter 27
From A/B Advanced and Technical Operations (G0131), choose **Batch Address Processing**
From Batch Address Processing (G01313), choose **Batch Address Revisions**

Before you process a batch of addresses, you might need to revise them. When you revise address batches, these screens hold the following information:

Screen	Description
Batch Address Revisions: Batch control	Identifies the transaction on the batch. The combination of user ID, batch number, and transaction number identify the batch in the Address Book Batch Input table. The system identifies any transaction with the same combination of data as one transaction.
Batch Address Revisions: Transaction	Uses transaction information to create JD Edwards World records in the Address Book Master table (F0101).

Screen	Description
Address Book Accounts Payable (F9)	Uses accounts payable information to create JD Edwards World records in the Supplier Master table (F0401).
Address Book Accounts Receivable (F10)	Uses accounts receivable information to create JD Edwards World records in the Customer Master table (F0301).
Who's Who (F5)	Uses contact information to create JD Edwards World records in the Who's Who table (F0111). You may enter multiple contacts per address record.
Additional Phone Numbers (F12)	Uses phone number information to create JD Edwards World records in the Contact Phone Numbers table (F0115). You may enter multiple phone numbers per address record.

To revise address batches

On Batch Address Revisions

1. Change the transaction information, if necessary.
2. Toggle to the Accounts Payable or Accounts Receivable format, if necessary.
3. Change the payables or receivables information.
4. Use the Change action.

What You Should Know About

Deleting address batch information	You can delete address batch information by deleting the transaction information.

Process Address Batches

Processing Address Batches

From Address Book (G01), enter 27
From A/B Advanced and Technical Operations (G0131), choose **Batch Address Processing**
From Batch Address Processing (G01313), choose **Batch Address Processing**

After you upload or add address information and revise it as necessary, process the address batches.

You can process address batches in either of the following modes:

Mode	Description
Proof mode	This mode: ▪ Verifies the data ▪ Produces an error report (if errors are detected)
Final mode	This mode: ▪ Creates address records in the Address Book Master table (F0101). ▪ Assigns address book numbers, if applicable ▪ Supplies information for fields that you leave blank ▪ Produces an update report

If you discover errors after processing your batch, you might need to:

- Purge processed batch addresses
- Delete the records through Address Book Revisions

This ensures that the records in error are removed from both the Address Book Batch Input table and the Address Book Master table (F0101). Then, if necessary, you can add the transactions again.

This program converts the addresses in the Address Book Batch Input table into JD Edwards World address records and stores them in the Address Book Master (F0101).

When you process address batches, the system generates two reports:

- Address Book Batch Update.
- Batch File Entry - Exceptions. This report prints only if errors or warnings are detected depending on how the processing options are set for Batch Address Processing (P01110Z).

```
 01110Z                                        JD Edwards World                                   Page No. . .        1
                                         Address Book Batch Update Rpt                            Date - . . . 04/18/17



A Address          Alpha                  Mailing          City        ST      Postal    Ctr          Phone             S
C  Number           Name                   Name                                Code                   Number            T
- --------  ----------------------- --------------------- --------------------- --- ------------ -----------------------
A  1893517  Country Gardens         Country Gardens       Parker         CO     80009               303 555-5874       C
                                    792 Round Hill Road
```

```
  00110Z                                         JD Edwards World                                   Page No. . .        3
                                           Batch File Entry - Exceptions                            Date - . . . 04/18/17

                                                   Address Book Entry - FINAL

       Batch          Transaction         Line       Tran          T T P Fld in
      Number             Number          Number      Set   Address  T C R  Error      Description              Field Value
  -------------- --------------------- ---------- ------ -------- - - - ------ ---------------------    -----------------
-

                            F0101 :    Updates                1  Transactions
                                                              1  Records

                            F0101Z:    Errors                    Transactions
```

Before You Begin

- Verify that your transactions are correct on Batch Address Review
- Ensure that you have revised your address records if necessary

What You Should Know About

Processing additional phone numbers and/or Who's Who contacts	You can process as many phone numbers or Who's Who contacts per address record as you want. Any errors found in the phone number / contact information will prevent the address record from processing unless you bypass the edits for this information via the processing options for Batch Address Processing (P01110Z). You may provide Line Numbers for additional Who's Who contacts and update information for an existing main contact (line number 0) by setting the processing option for Batch Address Processing.

Processing Options

See Address Book Batch File Processing (P01110Z).

Data Sequence for Batch Address Processing

Do not change the data sequencing for this report. If changed, the report produces inaccurate results.

Purge Address Batches

Purging Address Batches

From Address Book (G01), enter 27
From A/B Advanced and Technical Operations (G0131), choose Batch Address Processing
From Batch Address Processing (G01313), choose Processed Batch Address Purge

After you create JD Edwards World address batches, you can purge them. Because transactions cannot be processed more than once, purging batches saves disk space.

When you purge processed address batches, you purge all processed addresses from the Address Book Batch Input table, regardless of which batch they are in. This does not affect any other tables.

This is a DREAM Writer program.

Before You Begin

- Verify that your transactions processed correctly on Batch Address Review
- Back up the Address Book Batch Input table

What You Should Know About

Setting processing options for purging	Alternatively, you can purge your processed address batches by setting a processing option when you process address batches.
Deleting processed information	You cannot delete information on Batch Address Revisions. You must purge processed address batches to delete information from the Address Book Batch Input table.

Processing Options

See Batch File Purge (P00PURGE).

9 Updates and Purges

Overview to Updates and Purges

Objectives

- To update credit messages
- To update the category codes in the address book
- To update the most current address for an entity
- To purge:
    - Address book information
    - Audit logs
    - Message logs
    - Time logs

About Updates and Purges

Periodically, you might need to update or purge address book information. You can:

- Update credit messages
- Update category codes
- Update effective dates
- Create and update the search word table
- Purge records

Update Credit Messages

Updating Credit Messages

From Address Book (G01), enter 27
From A/B Advanced and Technical Operations (G0131), choose **Credit Message Reference**

Credit messages, sometimes referred to as flash messages, are valuable tools for communicating caution or special handling instructions about customers. You can view all addresses to which you have assigned a credit message code and easily update the credit message.

You revise credit messages when a customer with financial difficulty needs to pay you directly instead of through the mail or when a group of customers were updated with the incorrect credit message.

Examples of address book credit messages include:

- Over credit limit
- Requires purchase order
- Bad credit risk

Messages are stored in the Address Book Master table (F0101).

Before You Begin

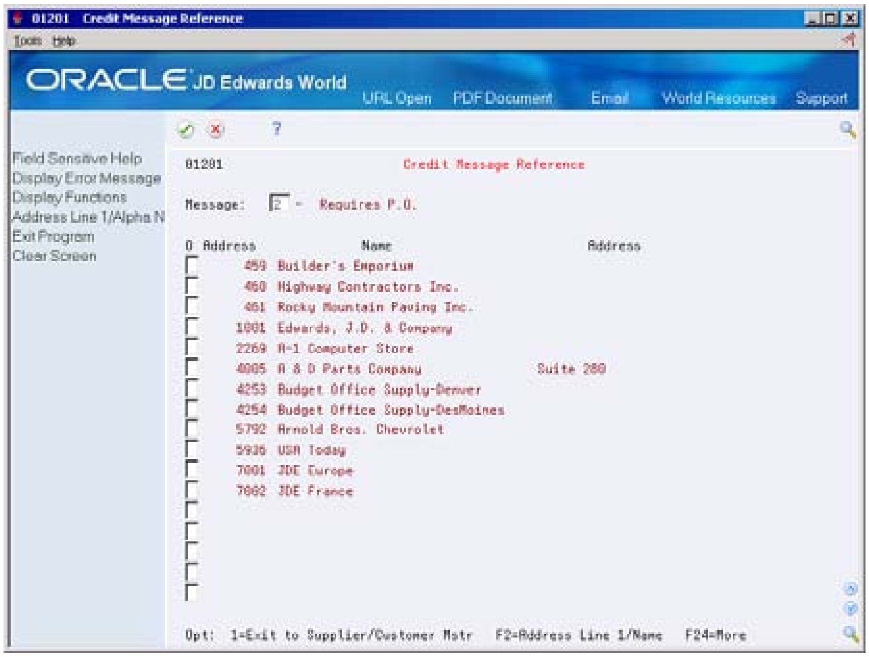
- Assign the appropriate credit message code to your supplier and customer records

What You Should Know About

Revising credit messages	You can also revise credit messages on the customer and supplier master records.

To update credit messages

On Credit Message Reference


01201 Credit Message Reference
Tools Help
ORACLE JD Edwards World
URL Open
PDF Document
Email
World Resources
Support
?
Field Sensitive Help
Display Error Message
Display Functions
Address Line 1/Alpha N
Exit Program
Clear Screen

```
01201                    Credit Message Reference

Message:   2  -  Requires P.O.

O Address             Name                         Address
        459 Builder's Emporium
        460 Highway Contractors Inc.
        461 Rocky Mountain Paving Inc.
       1001 Edwards, J.D. & Company
       2269 A-1 Computer Store
       4005 A & D Parts Company             Suite 200
       4253 Budget Office Supply-Denver
       4254 Budget Office Supply-DesMoines
       5792 Arnold Bros. Chevrolet
       5936 USA Today
       7001 JDE Europe
       7002 JDE France

Opt:  1=Exit to Supplier/Customer Mstr    F2=Address Line 1/Name    F24=More
```

1. Complete the following field:
   - Message
2. To review the appropriate record, choose Exit to Supplier / Customer Master.
3. On Supplier or Customer Master Information, update the credit message.

Field	Explanation
Message:	A user defined code (00 / CM) that displays information about a particular customer or supplier. Examples: 1 Over credit limit 2 Requires purchase order 3 Not on maintenance agreement 4 Notify the credit manager The Customer Master Information and the Supplier Master Information forms display credit messages for customers and suppliers when you enter or locate information.

What You Should Know About

Double-byte environments	Enter uppercase characters (A-Z). If you enter lowercase characters, no information displays.

Update Category Codes

Updating Category Codes

From Address Book (G01), enter 27
From A/B Advanced and Technical Operations (G0131), choose **Global Update Category Codes**

You might need to update some of the category codes you originally entered in the address book. For example, if you change the description of a category code, you need to update it throughout the JD Edwards World system.

You update category codes globally to update items stored in the Address Book Master table (F0101). Examples include:

- Category Codes 1 - 30
- S.I.C. Code
- Employee
- Payables
- Receivables
- Business Unit
- Credit Message
- Search Type
- Tax ID
- Person/Corp Code

This is a DREAM Writer program.

What You Should Know About

Entering processing options

Because the program does not verify information in certain fields, use care when entering information in the following processing options:

- Employee
- Payables Y/N/M/F for suppliers
- Receivables Y/N for customers

Before You Begin

- Back up the Address Book Master table (F0101)

Processing Options

See Global Address Book Update (P01490).

Update Effective Dates

Updating Effective Dates

	From Address Book (G01), enter 27 From A/B Advanced and Technical Operations (G0131), choose **Effective Address Update**

If you maintain addresses by effective date, you need to update effective dates on a regular basis. Running Effective Address Update ensures that you are using the most current address when you send correspondence, billing, payments, and other mailings.

When you update effective addresses, the system updates the Address Book Master table (F0101) with the effective date for the current address in the Address by Date table (F0116).

This is a DREAM Writer program.

Before You Begin

- Ensure that the Address by Effective Date feature is activated in address book constants

See Also

- *Setting Up Constants for Address Book (P0009011)*

Data Selection For Effective Address Update

If you do not want to update all addresses, use data selection criteria to limit the addresses affected.

You can set up a version to update addresses to a date other than the current date. This might be helpful to ensure that addresses are in effect for the day you mail your correspondence instead of the day that the addresses were generated.

Create and Update the Search Word Table

Creating and Updating the Search Word Table

With the word search feature, you can locate a name or address by performing one of the following:

- Name search, to locate names
- Query search, to locate telephone numbers, category codes, and so on

When you make additions, changes, or deletions to the address book, you need to create and then update the search word table so that your word search includes the most current information.

To create and update your search word tables, the following fields are used:

- Alpha Name (ABALPH, ABALPH1). Only double-byte environments use ABALPH1.
- Search Type (ABAT1).
- Category Codes 1 through 30 (ABACxx).
- Tax ID Number (ABTAX, ABTX2).
- Long Address Number (ABALKY).
- Who’s Who Mailing Name (WWMLN1, WWMLN1). Only double-byte environments use WWMLN1.
- Phone numbers for Who’s Who (WPAR1, WPPH1).
- Address lines 1 through 4, City, County (ALADDx, ALCTY1, COUN). These fields are for both single- and double-byte characters. However, if you enter double-byte characters, you cannot search on them. Use the Additional Query Search Criteria available on the Address Book Revisions form (F18) to enter a single-byte version.
- State Code (ALADDS).
- Postal Code (ALADDZ).
- Country Code (ALCTR).
- Parent Number (MAPA8).
- Generic Text. Text can be entered on the Text window. For double-byte environments, note that you cannot search on the double-byte text.

This task consists of:

- Creating the Search Word Table
- Updating the Search Word Table

Creating the Search Word Table

From Address Book (G01), enter 27
From A/B Advanced and Technical Operations (G0131), choose **Build Search Word File**

You should create the search word table only once. You create this table using key words found in the address book and who's who.

To create the table, run the Build Search Word program. This program writes a record in the Word Search Master (F01800) and the Word Search Occurrence Master (F009101) tables for every word found in certain Address Book and Who's Who fields.

When you create the search word table, the system reads every record in the following tables:

- Address Book Master (F0101)
- Who's Who (F0111)
- Contact Phone Numbers (F0115)

The program excludes stop words (common words), such as street, avenue, or building, that are found throughout the Address Book system.

Before You Begin

- Determine whether the search word table has already been created. Use command WRKOBJ ABLOG. If object ABLOG of type *DTAQ appears in your production library, it has already been created.

Updating the Search Word Table

From Address Book (G01), enter 27
From A/B Advanced and Technical Operations (G0131), choose **Refresh Search Word File**

Use the Refresh Search Word program (P01820) to periodically update your word search table. This program updates the Word Search Master and Word Search Occurrence Master tables.

All changes made to words in the Address Book Master table are logged in a data queue called "ABLOG." When you run the Refresh Search Word program, the system updates the word table based on the information in this data queue. The data queue is created by the CL program (J01BDWRD) that calls the Build Search Word program (P01BDWRD).

Updating the search word table runs more quickly than creating the table.

Before You Begin

- Ensure that all users are signed off the system before you run this program

Purge Records

Purging Records

To conserve disk space on your system and to keep the volume of your records from becoming unmanageable, you should periodically purge your address book records.

This task consists of:

- Purging Address Book Information and Related Files
- Purging the Audit Log
- Purging the Message Log
- Purging the Time Log

These are DREAM Writer programs.

Before You Begin

- Ensure that all users are signed off the system before you run a purge program
- Back up the appropriate table, depending on which records the program purges

What You Should Know About

Purge Address Book	Purge Address Book is the only purge program in the Address Book system that has processing options. All purge programs have data selection so that you can specify which records to purge. **Caution:** You should back up your current Address Book files prior to executing this purge. If you would like to display which records will be selected for deletion, you should run this program in the Proof mode. Once you are satisfied with the results presented in the Proof mode, you can run this program in the Final mode. For best results, choose a low system demand time to run this purge program.

Purging Address Book Information and Related Files

✦	From Address Book (G01), enter 27 From A/B Advanced and Technical Operations (G0131), choose **Purge Address Book**

You should periodically purge addresses that have become inactive or were entered in error. To do this, run the Purge Address Book program. The Purge Address Book program (P01800) will delete any records selected by the DREAM Writer which are not active addresses in certain major files or are not active addresses used as subledgers.

- Address Book Master (F0101)
- Who's Who (F0111)
- Address Book Generic Text (F0016/F00163)
- Contact Phone Numbers (F0115)
- Address by Date (F0116)
- Supplier Master (F0401)
- Supplier Company/Bus.Unit Defaults (F04015)
- Payee Control (F0450)
- Customer Master (F0301)
- Customer Company/Bus.Unit Defaults (F03015)
- Address Organizational Structure Master (F0150)
- Bank Account Cross Reference (F0030)
- E-Mail/URL (F01018)
- Socio/Economic Data (F01014)
- Related Addresses (F01017)
- User Information (F0155)
- Supplemental Data (F01092/F01093)
- Time Log (F0112)
- User Filters (F01136)
- ABLOG – update data queue ABLOG. Regeneration of word file will exclude purged address

This program does not purge records that have associated transactions in specific files. The following is a list of the major files and the fields which are being edited:

- Accounts Payable Ledger (F0411) RPAN8
- Accounts Receivable Ledger (F0311) RPAN8
- Address Book Master (F0150) MAPA8
- Sales Order Detail (F4211) SDAN8, SDSHAN
- Purchase Order Detail (F4311) PDAN8

- Accounts Balances (F0902) GBSBL, GBSBLT
- Contract Billing Master (F5201) G4AN8O
- Tenant/Lease Master (F1501) NEAN8, NEAN8J
- Work Order Master (F4801) WAAN8
- Employee Master (F060116) YAAN8
- Participant Master (F08901) HUAN8
- Account Ledger (F0911)GLSBL, GLSBLT

Other files checked include: F41001, F01133, F01134, F0411P, F0413, F4311J, F0010, F4450, and F01017.

Once an error is detected in the editing of these major files, the remainder of the files will not be checked and the deletion will not occur.

What You Should Know About

This report can be run in Proof or Final mode.

An exception report will be generated when this program is run. The report will inform you of the address book records which cannot be deleted. If there are no problems with the address book records you want to purge, no report will be generated.

There is a processing option which will allow you to print all of the report information. In this case, you will receive report information of the Address Book records which will be deleted.

You may set a processing option to delete one-time suppliers. This program will delete any one-time suppliers without validating the address over files throughout the system. A one-time supplier is defined by setting the Payables flag (ABATP) to ‘M’ in the address record.

Caution: An address book record can be partially deleted because the record is ‘in use’. If a "Record in Use" error occurs, you should wait and try to purge the address another time. You may re-run this program until the address is successfully deleted out of the Address Book files.

The Purge Address Book program uses the data selection to determine which records to consider for purging. The Data Sequence is set for Address Book Number only and should not be altered.

Once the records are selected, the Purge Address Book program calls the Address Book Delete Server (X01950). The Address Book Delete Server was designed to delete all of the information attached to an Address Book Number in the Address Book. All secondary files in the Address Book Database will be checked and deleted if a delete is valid.

Processing Options

See Address Book Purge (P01800).

Purging the Audit Log

	From Address Book (G01), enter 27 From A/B Advanced and Technical Operations (G0131), choose **Purge Audit Log**

If you use the Audit Log feature, you should periodically purge your audit log records from the Address Book Master Audit Log table (F0101A). To do this, run the Purge Audit Log program.

Purging the Message Log

	From Address Book (G01), enter 27 From A/B Advanced and Technical Operations (G0131), choose **Purge Message Log**

If you use the Electronic Mail system, you should periodically purge your message log records from the Message Log table (F0113). To do this, run the Purge Message Log program.

Purging the Time Log

	From Address Book (G01), enter 27 From A/B Advanced and Technical Operations (G0131), choose **Purge Time Log**

If you use the Electronic Mail system, you should periodically purge time log records from the Time Log Ledger table (F0112). To do this, run the Purge Time Log program.

10 **Electronic Mail**

Overview to Electronic Mail

Objectives

- To understand the features and functions of Electronic Mail

About Electronic Mail

You can use the Electronic Mail system to let others know whether you are in the office, leave remarks, send and receive messages, and display time logs.

- Maintain a calendar
- Create temporary and permanent mail distribution lists

The tasks for electronic mail (e-mail) consist of:

- Working with employee mailboxes
- Working with messages
- Working with message features
- Working with bulletin boards
- Assigning e-mail user defined codes

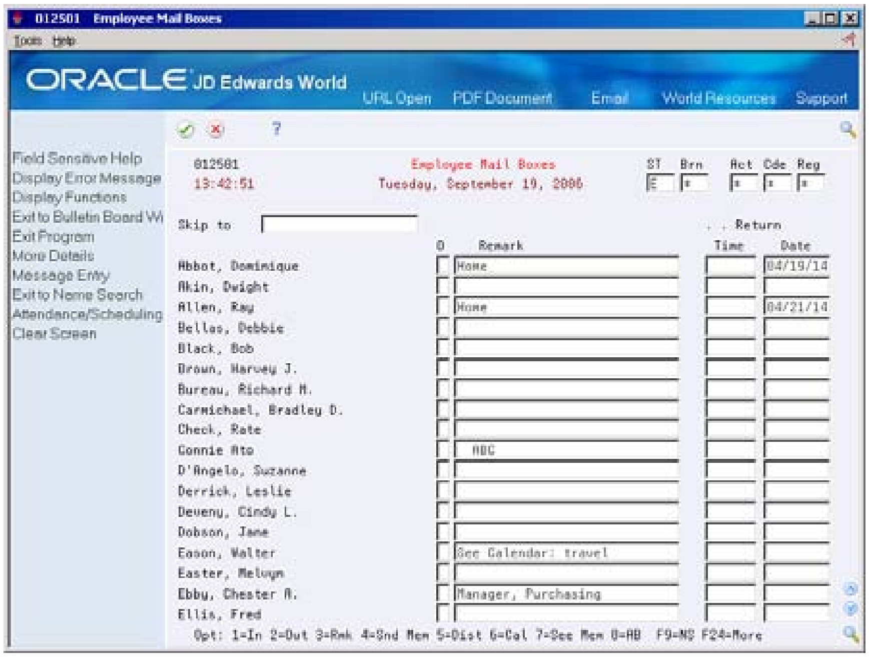
Work with Employee Mailboxes

Working with Employee Mailboxes

	From Electronic Mail (G02), choose **Employee Mail Boxes**

Working with employee mailboxes allows you to:

- Sign in and out
- Access mailboxes
- Enter remarks
- View the calendar
- Revise the calendar
- View time logs


012501 Employee Mail Boxes
Tools
Help
ORACLE JD Edwards World
URL Open
PDF Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit to Bulletin Board Wi
Exit Program
More Details
Message Entry
Exit to Name Search
Attendance/Scheduling
Clear Screen

012581 Employee Mail Boxes
13:42:51 Tuesday, September 19, 2006

ST: E
Brn: *
Act: *
Cde: *
Reg: *

Skip to: ☐

	O	Remark	. . Return Time	Date
Abbot, Dominique	☐	Home		04/19/14
Akin, Dwight	☐			
Allen, Ray	☐	Home		04/21/14
Bellas, Debbie	☐			
Black, Bob	☐			
Brown, Harvey J.	☐			
Bureau, Richard M.	☐			
Carmichael, Bradley D.	☐			
Check, Rate	☐			
Connie Ato	☐	ABC		
D'Angelo, Suzanne	☐			
Derrick, Leslie	☐			
Deveny, Cindy L.	☐			
Dobson, Jane	☐			
Eason, Walter	☐	See Calendar: travel		
Easter, Melvyn	☐			
Ebby, Chester A.	☐	Manager, Purchasing		
Ellis, Fred	☐			

Opt: 1=In 2=Out 3=Rmk 4=Snd Mem 5=Dist 6=Cal 7=See Mem 0=AB F9=NS F24=More

To sign in and out

Signing in and out informs others of your whereabouts. When you sign out, you can also enter a remark, return date, and return time. If you do not enter a remark, the system supplies the word home. If you do not enter a return date, the system uses the next business day.

On Employee Mailboxes

Choose In or Out in the following field:

- Option

What You Should Know About

Alternative method of signing in and out	You can also sign in and out by accessing the Electronic Mail menu (G02) and choosing Sign In and Out. This method is quicker.

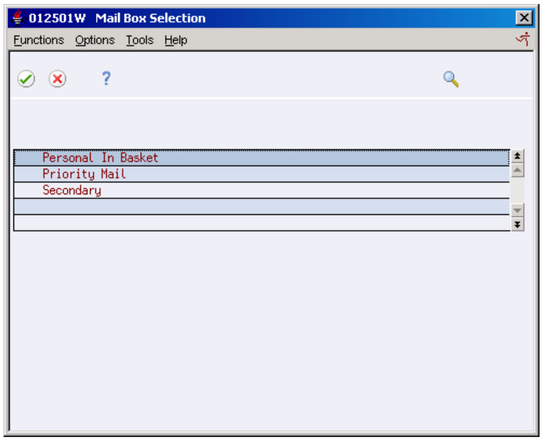
To access a mail box

The system provides a repository of mailbox categories. You can access mail from these user-defined categories. Examples include:

- Personal in basket
- Priority mail
- Junk mail

On Employee Mailboxes

1. Choose See Memo.



Personal In Basket
Priority Mail
Secondary

2. On Mail Box Selection, select the appropriate mailbox.
3. On Message Summary, choose View / Enter Message next to the message.

What You Should Know About

Incoming mail	Every mail box that contains a message appears on the Mail Box Selection window. A highlighted option field indicates that a mailbox contains a new message.

To enter remarks

You can enter a remark to provide more information about your whereabouts, your schedule, and so on. For example, you might enter a remark indicating that you are in a meeting, on vacation, or can be reached at a particular phone number. Later, you might need to update your existing remark, for example, if you are no longer in a meeting and are leaving on a business trip.

On Employee Mail Boxes

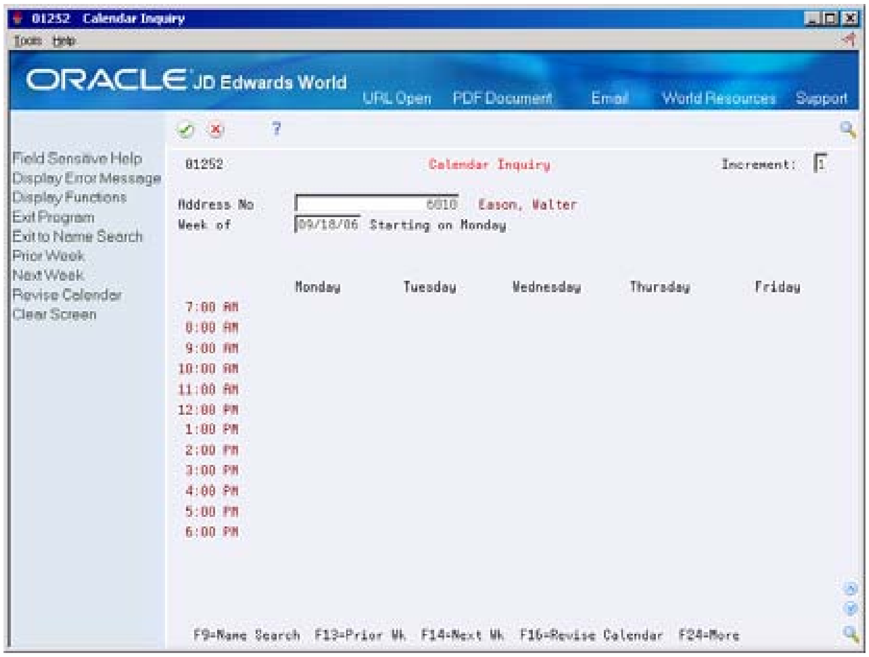
1. In the Option field, choose Remark
2. Enter your remark.

To view the calendar

Use the calendar to show others your appointment times.

On Employee Mail Boxes

1. Enter the name of the person whose calendar you want to view.
2. Choose Calendar.


01252 Calendar Inquiry
Tools Help
ORACLE JD Edwards World
URL Open
PDF Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
Exit to Name Search
Prior Week
Next Week
Revise Calendar
Clear Screen

```
01252                        Calendar Inquiry                 Increment: 1

Address No            6010  Eason, Walter
Week of       09/18/06  Starting on Monday

              Monday      Tuesday     Wednesday    Thursday      Friday
  7:00 AM
  8:00 AM
  9:00 AM
 10:00 AM
 11:00 AM
 12:00 PM
  1:00 PM
  2:00 PM
  3:00 PM
  4:00 PM
  5:00 PM
  6:00 PM

  F9=Name Search  F13=Prior Wk  F14=Next Wk  F16=Revise Calendar  F24=More
```

To revise the calendar

You can revise your appointment times after they have been entered. In addition, use the calendar for scheduling conference rooms and equipment. You can do this by setting up address book records with specific search types. For example, use IF for internal facilities.

On Employee Mail Boxes

1. Enter the name of the person whose calendar you want to view.
2. Choose Calendar.
3. Choose Revise Calendar to make a revision.

What You Should Know About

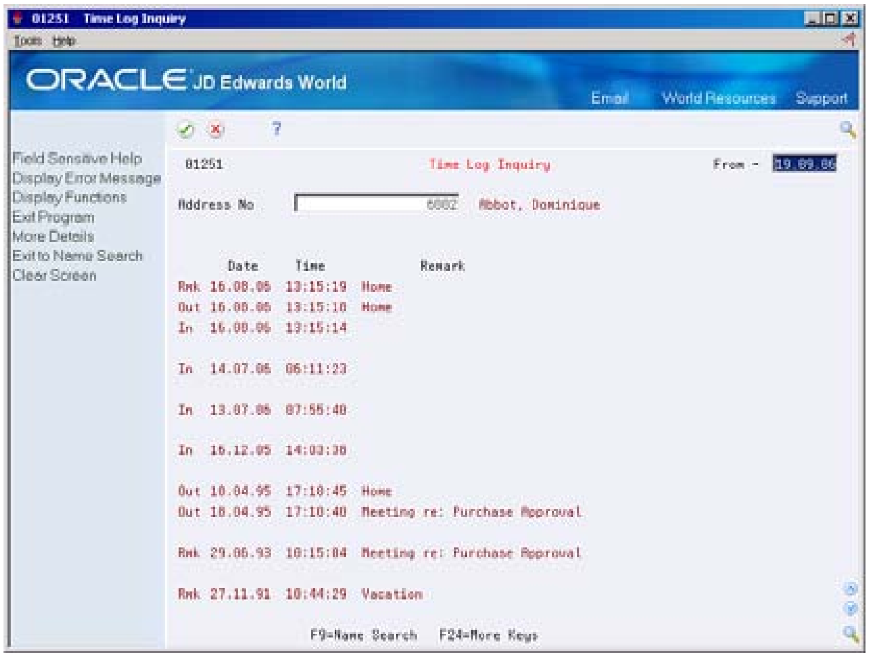
Revising the calendar for extended periods of time	When the Calendar Inquiry form is in input mode (all input areas are underlined), you can revise the calendar by typing information or using the following special characters: ▪ Enter an equals sign (=) with a specific time under the scheduled item to create ditto marks (”) for the time indicated. For example, in the first time slot, Thursday (8:00), enter San Antonio. Move the cursor to the next slot (9:00) and enter = 600. The system creates ditto marks in all time slots through 6:00 p.m. on the same day. ▪ Enter a plus sign (+) with a number of hours under the scheduled time to create ditto marks for the time calculated. For example, start in the 8:00 p.m. time slot. Move the cursor to the next slot down (9:00) and enter +200. The system creates ditto marks in time slots for the next two hours. You can also use the plus sign for multiple days. If you enter +2400, the ditto marks are repeated for 48 hours (two days). ▪ Enter ditto marks in the time slot beneath the appointment description to reserve specific times.

To view time logs

You can view the times that employees sign in and out and view employee remarks.

On Employee Mail Boxes

Enter 9 in the Option field to access Time Log Inquiry.


01251 Time Log Inquiry
Tools Help
ORACLE JD Edwards World
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
More Details
Exit to Name Search
Clear Screen

```
01251                        Time Log Inquiry                 From - 19.09.06

Address No              6002  Abbot, Dominique


          Date      Time              Remark
Rmk 16.08.06  13:15:19  Home
Out 16.08.06  13:15:10  Home
In  16.08.06  13:15:14

In  14.07.06  06:11:23

In  13.07.06  07:55:40

In  16.12.05  14:03:30

Out 10.04.95  17:10:45  Home
Out 10.04.95  17:10:40  Meeting re: Purchase Approval

Rmk 29.06.93  10:15:04  Meeting re: Purchase Approval

Rmk 27.11.91  10:44:29  Vacation

                  F9=Name Search    F24=More Keys
```

Processing Options

See Message Log (P012501).

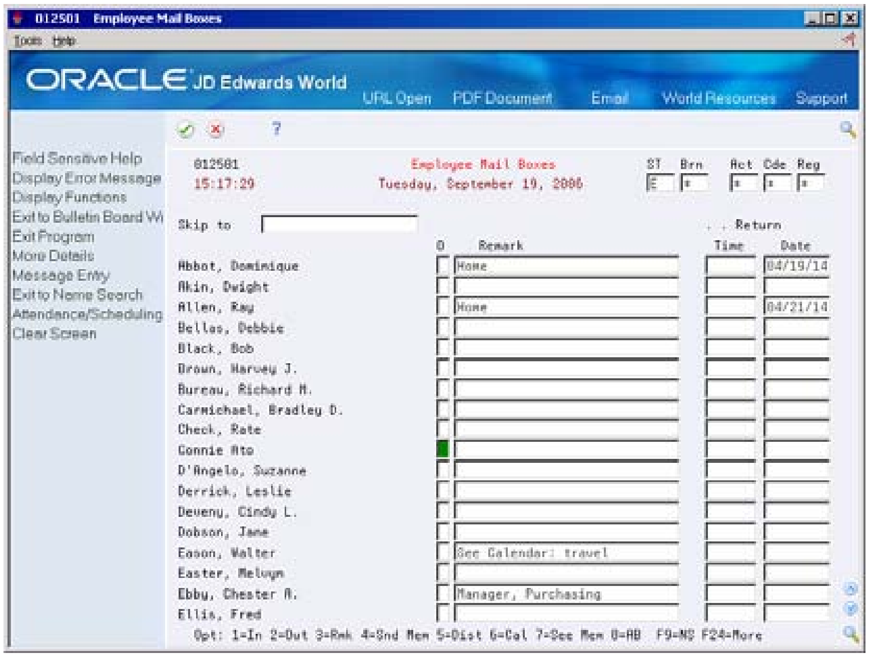
Work with Messages

Working with Messages

Electronic mail (e-mail) enables you to communicate more efficiently with the people in your company. You can send e-mail messages, receive messages, and work with messages in a variety of ways.

This section includes instructions for the following:

- To send a message
- To revise a sent message
- To create a temporary distribution list
- To send a message to a permanent distribution list
- To view a message
- To forward a message
- To return a message
- To route future mail by setting the mail filter
- To deactivate mail re-routing
- To print a message log


012501 Employee Mail Boxes
Tools Help
ORACLE JD Edwards World
URL Open
PDF Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit to Bulletin Board Wi
Exit Program
More Details
Message Entry
Exit to Name Search
Attendance/Scheduling
Clear Screen

012501 Employee Mail Boxes
15:17:29 Tuesday, September 19, 2006

ST E Brn Act Cde Reg

Skip to

	O	Remark	Return Time	Return Date
Abbot, Dominique	☐	Home		04/19/14
Akin, Dwight	☐			
Allen, Ray	☐	Home		04/21/14
Bellas, Debbie	☐			
Black, Bob	☐			
Brown, Harvey J.	☐			
Bureau, Richard M.	☐			
Carmichael, Bradley D.	☐			
Check, Rate	☐			
Connie Ato	☐			
D'Angelo, Suzanne	☐			
Derrick, Leslie	☐			
Deveny, Cindy L.	☐			
Dobson, Jane	☐			
Eason, Walter	☐	See Calendar: travel		
Easter, Melvyn	☐			
Ebby, Chester A.	☐	Manager, Purchasing		
Ellis, Fred	☐			

Opt: 1=In 2=Out 3=Rmk 4=Snd Mem 5=Dist 6=Cal 7=See Mem 8=AB F9=NS F24=More

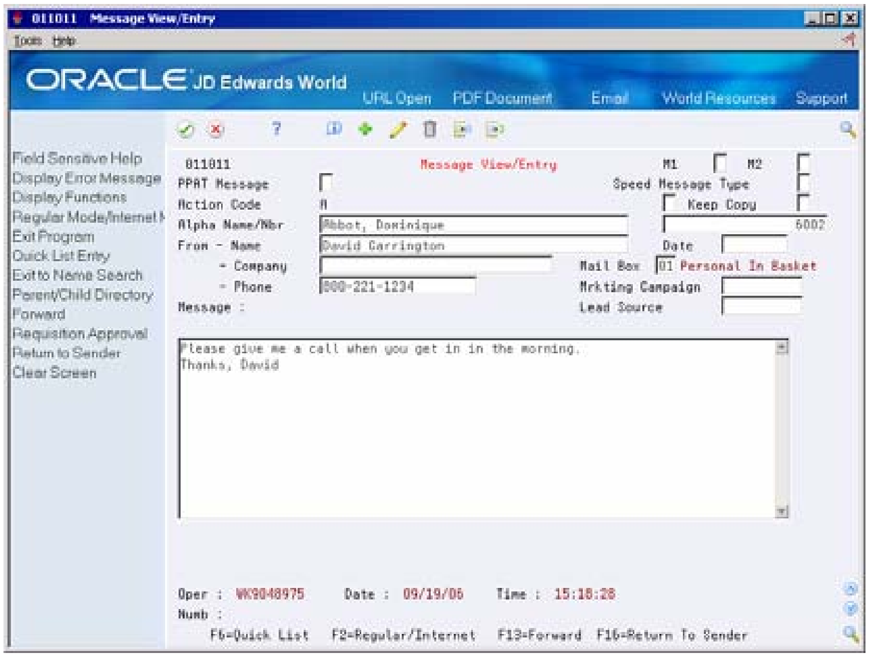
To send a message

	From the Electronic Mail menu (G02), choose **Employee Mail Boxes**

You can use the e-mail system to send messages. In addition, you can control when a message is sent by assigning a tickler date. This is especially helpful if you want to remind yourself about upcoming meetings or other obligations.

On Employee Mail Boxes

1. Choose Send Memo to access Message View / Entry.


011011 Message View/Entry
Tools Help
ORACLE JD Edwards World
URL Open
PDF Document
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Regular Mode/Internet M
Exit Program
Quick List Entry
Exit to Name Search
Parent/Child Directory
Forward
Requisition Approval
Return to Sender
Clear Screen

011011 Message View/Entry
M1 ☐ M2 ☐
PPAT Message ☐
Speed Message Type ☐
Action Code A
☐ Keep Copy ☐
Alpha Name/Nbr Abbot, Dominique 6002
From - Name David Carrington
Date
- Company
Mail Box 01 Personal In Basket
- Phone 800-221-1234
Mrkting Campaign
Message :
Lead Source

Please give me a call when you get in in the morning.
Thanks, David

Oper : WK9048975 Date : 09/19/06 Time : 15:18:28
Numb :
F6=Quick List F2=Regular/Internet F13=Forward F16=Return To Sender

2. On Message View / Entry, complete the following optional fields:

- Company
- Phone
- Date

3. Enter a message.

Field	**Explanation**
Company	The associated company name of the individual who is sending the message.
Phone	The phone number of the individual who is sending the message.
Date	The future reminder date. The system does not send the message until this date. The default value is today's date.

What You Should Know About

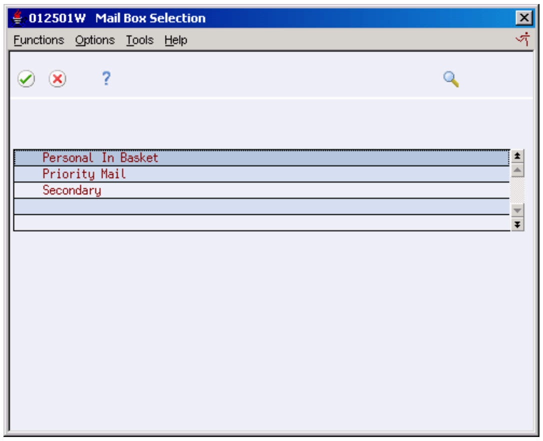
Viewing sent messages	You can view the messages that you have sent. On Employee Mail Boxes, choose See Memo to access the Mail Box Selection window. On Mail Box Selection, choose Sent Messages.
Entering more text to your messages	You can enter more text to your messages by paging down to access additional pages.
Entering partial names or numbers	You can enter a partial name or an employee number in the Alpha Name / Number field of Message View / Entry. If your entry matches a name or number in the Address Book Master table (F0101), the full alpha name appears in the field. If the address book contains multiple names that begin with the partial name you entered, Name Search appears with a list of possible names from which to choose.
Keeping a copy	Use the Keep Copy feature when you want a copy for future reference or for subsequent mailings. Enter 1 in the Keep Copy field and the system places a copy in your mail box.

To revise a sent message

You can revise a message after you have sent it. For example, you might want to change the meeting time from 10:00 a.m. to 9:00 a.m. on a message you have already sent.

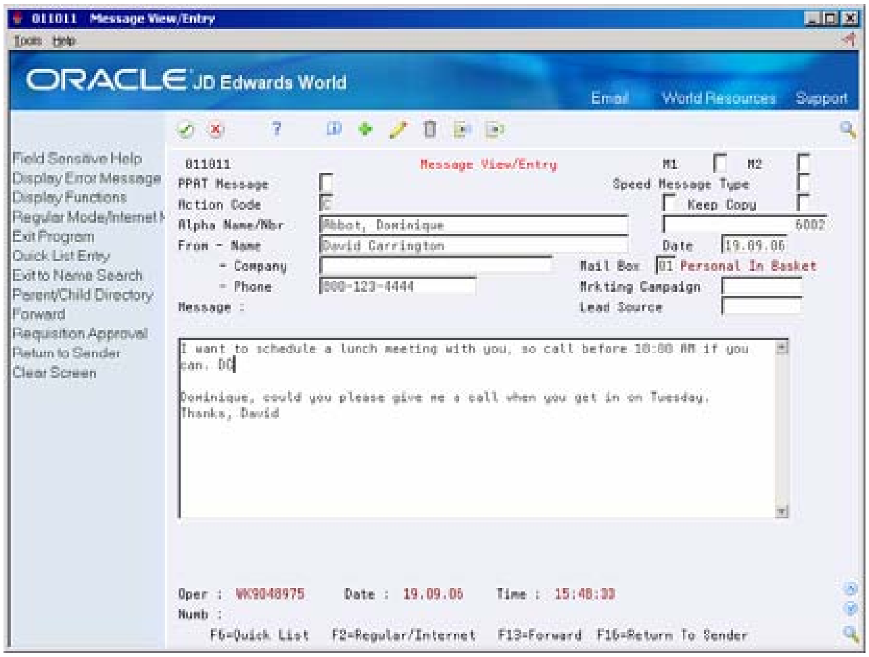
On Employee Mail Boxes

1. To access Mail Box Selection, choose See Memo.



Personal In Basket
Priority Mail
Secondary

2. On Mail Box Selection, choose the Sent Message (F6). You can also select the mailbox to see messages sent only for that particular mailbox.
3. On Message Summary, choose View / Enter Message.


011011 Message View/Entry
Tools Help
ORACLE JD Edwards World
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Regular Mode/Internet M
Exit Program
Quick List Entry
Exit to Name Search
Parent/Child Directory
Forward
Requisition Approval
Return to Sender
Clear Screen

```
011011                    Message View/Entry            M1  ☐  M2  ☐
PPAT Message        ☐                             Speed Message Type ☐
Action Code         C                                ☐ Keep Copy     ☐
Alpha Name/Nbr      Abbot, Dominique                               6002
From - Name         David Garrington                 Date   19.09.06
     - Company                                 Mail Box  01 Personal In Basket
     - Phone        800-123-4444               Mrkting Campaign
Message :                                      Lead Source

I want to schedule a lunch meeting with you, so call before 10:00 AM if you
can. DG

Dominique, could you please give me a call when you get in on Tuesday.
Thanks, David

Oper :  WK9048975     Date :  19.09.06     Time :  15:48:33
Numb :
    F6=Quick List   F2=Regular/Internet   F13=Forward   F16=Return To Sender
```

4. On Message View / Entry, use the Change action to revise the message.

What You Should Know About

Revising the text of a sent message	If you revise a sent message, a highlighted “REVISED” message appears on Message Summary to alert recipients who already viewed the original message that it has been changed. Recipients who have not yet viewed the message see only the revised version. When you are revising a sent message, your name appears in both the Alpha Name and From Name fields. Your message still reaches the destination that you have specified.

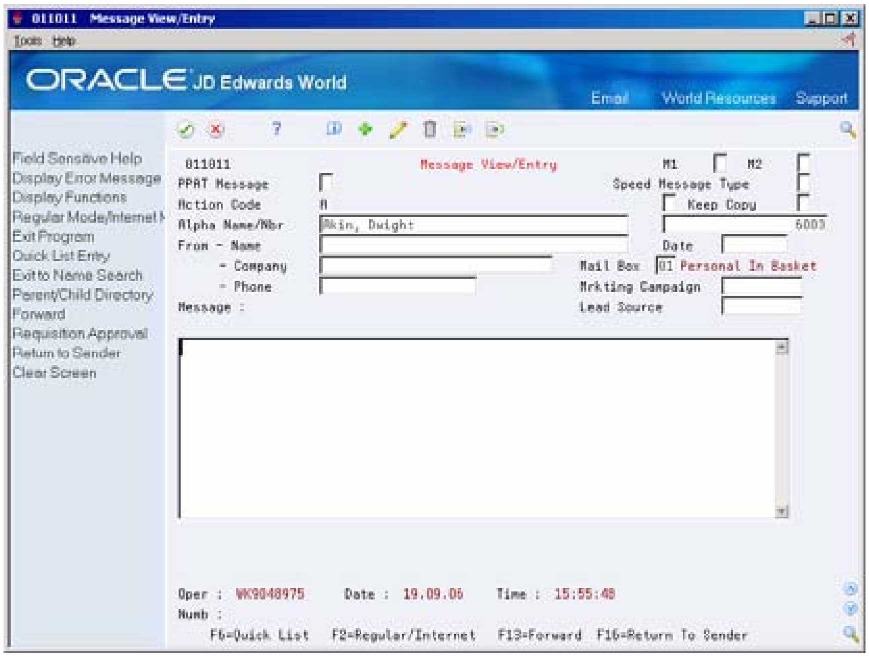
To create a temporary distribution list

✧	From the Electronic Mail menu (G02), choose **Employee Mail Boxes**

For a one-time message, you can create a temporary distribution list for a group of people. This allows you to send notices, instructions, or requests to several people, without creating a permanent distribution list.

On Employee Mail Boxes

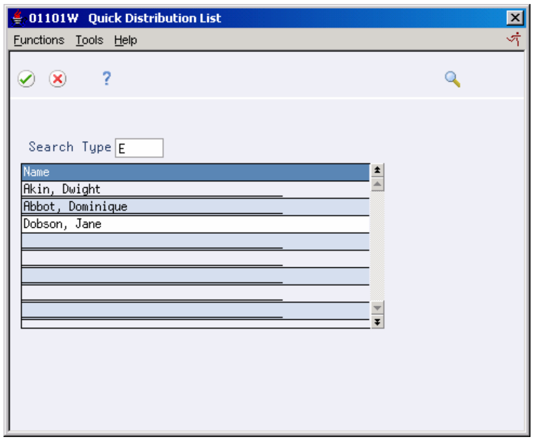
1. Choose Send Memo.


011011 Message View/Entry
Tools Help
ORACLE JD Edwards World
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Regular Mode/Internet M
Exit Program
Quick List Entry
Exit to Name Search
Parent/Child Directory
Forward
Requisition Approval
Return to Sender
Clear Screen

011011 Message View/Entry
M1 ☐ M2 ☐
PPAT Message ☐
Speed Message Type ☐
Action Code A
Keep Copy ☐ ☐
Alpha Name/Nbr Akin, Dwight 6003
From - Name
Date
- Company
Mail Box 01 Personal In Basket
- Phone
Mrkting Campaign
Message :
Lead Source

Oper : WK9048975 Date : 19.09.06 Time : 15:55:48
Numb :
F6=Quick List F2=Regular/Internet F13=Forward F16=Return To Sender

2. On Message View / Entry, choose the Quick List (F6).


01101W Quick Distribution List
Functions Tools Help

Search Type E

Name
Akin, Dwight
Abbot, Dominique
Dobson, Jane

3. On Quick Distribution List, enter the names that you want to include in the list.
4. Return to Message View / Entry.
5. Enter the message.

   To identify the distribution list as temporary, the system displays *Quick List in the Name field.

What You Should Know About

Entering partial names or numbers	You can enter a partial name or an employee number in the Alpha Name/Number field on the Quick Distribution List form. If your entry matches a name or number in the Address Book Master table (F0101), the full alpha name appears in the field. If the address book contains multiple names that begin with the partial name you entered, Name Search appears with a list of possible names from which to choose.
Making a temporary distribution list permanent	To make a temporary distribution list permanent, choose Save List on the Quick Distribution List window. The system creates a parent/child organizational list with structure type EML (for e-mail).
Sending messages to a permanent distribution list	To send a message to a permanent distribution list, you send the message to the parent address book number.
Securing mail distribution lists	You cannot secure mail distribution lists. However, you can activate e-mail security in the address book constants. This prevents users from viewing each other's mail.

To send a message to a permanent distribution list

From the Electronic Mail menu (G02), choose Employee Mail Boxes

You must create a permanent distribution list before you can use it to send messages. These distribution lists are necessary to communicate with a group of people on a regular basis.

On Employee Mail Boxes

1. Choose Send Memo.
2. On Message View/Entry, type the parent mail distribution number in the following field and press Enter:
   - Number
3. Enter the message.

What You Should Know About

Locating a permanent distribution list	If you do not know the parent mail distribution number but you know its name, you can locate it by doing one of the following: ▪ Press F9 in the Alpha Name field on Message View / Entry to access Name Search ▪ Press F9 in the Number field on Message View / Entry to access Name Search On Name Search, enter a partial or complete name in the Alpha Name field and M in the Search Type field.
Deleting names from distribution lists	To delete names from a permanent distribution list, you must locate a parent and delete the unwanted children on Structure Revisions.

See Also

- *Creating Parent/Child Relationships* (P0150) for information about setting up a permanent distribution list

To view a message

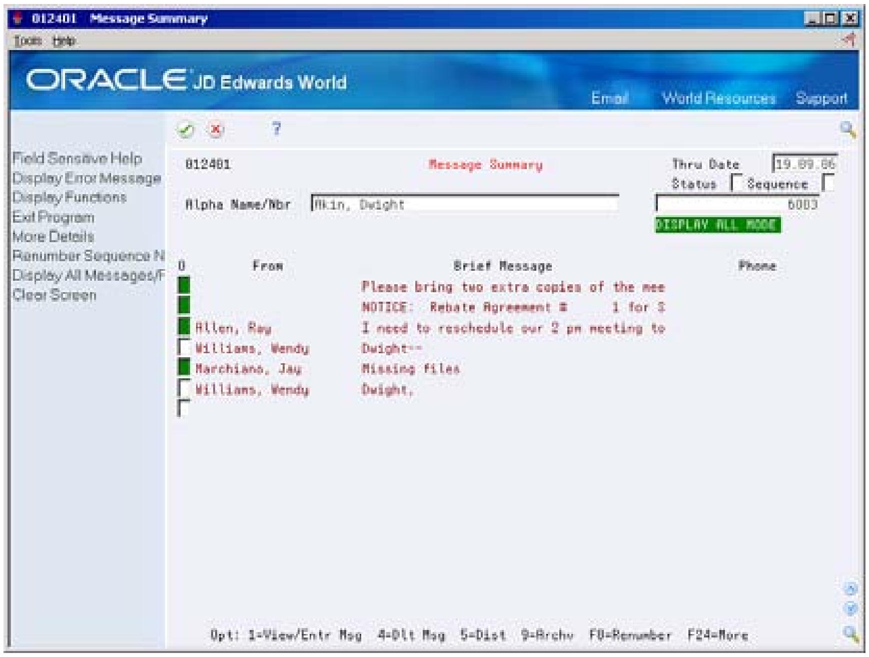
You can use the Electronic Mail system to view your messages. Additionally, your company might choose to set up mail box categories that route a message sent to you to a particular mail box. Examples of mail box categories (which are user defined) include:

- Personal in basket
- Priority mail
- Junk mail

If you receive a new message, the system highlights the Option field next to your name on Employee Mail Boxes.

On Employee Mail Boxes

1. Choose See Memo.
2. On Mail Box Selection, choose a mailbox.


012401 Message Summary
Tools Help
ORACLE JD Edwards World
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
More Details
Renumber Sequence N
Display All Messages/F
Clear Screen

012401 Message Summary

Thru Date 19.09.06

Status ☐ Sequence ☐

Alpha Name/Nbr Akin, Dwight 6003

DISPLAY ALL MODE

O	From	Brief Message	Phone
🟩		Please bring two extra copies of the mee	
🟩		NOTICE: Rebate Agreement # 1 for 3	
🟩	Allen, Ray	I need to reschedule our 2 pm meeting to	
☐	Williams, Wendy	Dwight--	
🟩	Marchiano, Jay	Missing files	
☐	Williams, Wendy	Dwight,	
☐			

Opt: 1=View/Entr Msg 4=Dlt Msg 5=Dist 9=Archv F8=Renumber F24=More

3. On Message Summary, choose View / Enter Message.

What You Should Know About

Mail Box Selection window	The Mail Box Selection form does not appear if you have messages in only one mail box. In this case, when you choose See Memo from Employee Mail Boxes, you immediately access Message Summary.
Printing a message	To print a single message, choose Print Message.
Workflow "active messages"	Workflow "active messages" are electronically generated messages from the Electronic Workbench. These messages prompt you for information relating to tasks such as the approval of purchase orders and work orders.
Identifying multiple recipients	To identify other recipients of the same message that you received, access Message Summary and enter 5 in the Option field.

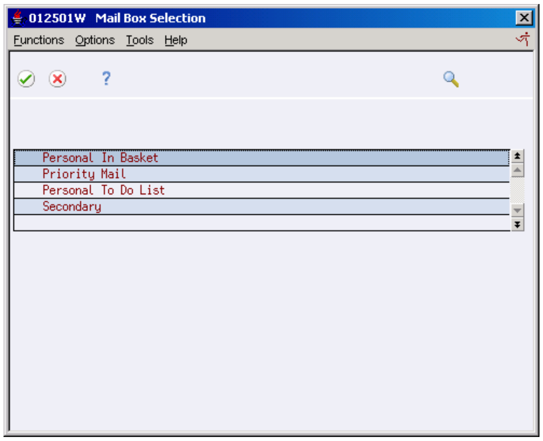
To forward a message

	From the Electronic Mail menu (G02), choose **Employee Mail Boxes**

If you want another person or group of people to see a message that you have received, you need to forward the message. This task is different from responding to a message and returning it to the original sender.

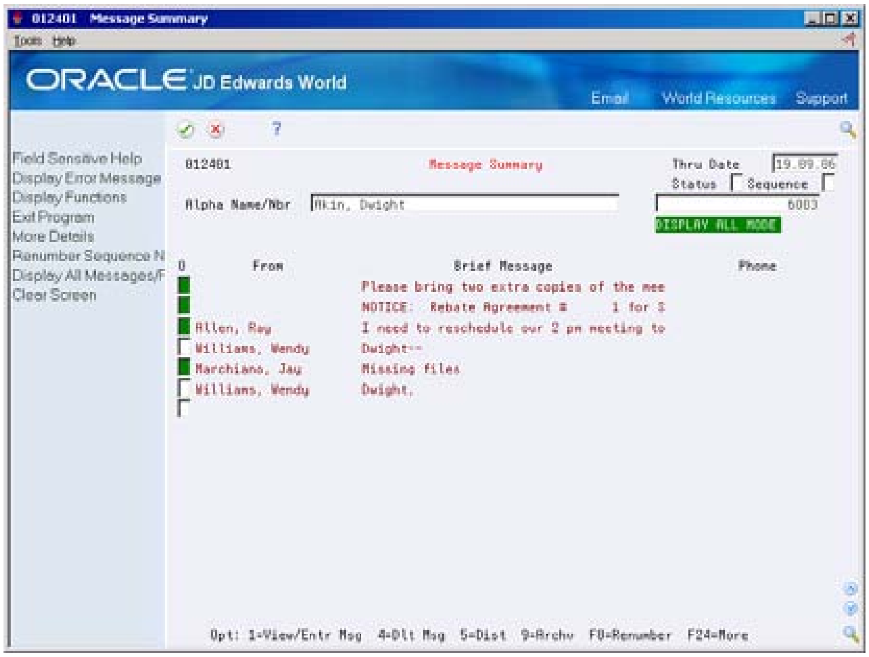
On Employee Mail Boxes

1. Choose See Memo.


012501W Mail Box Selection
Functions Options Tools Help

Personal In Basket
Priority Mail
Personal To Do List
Secondary

2. On Mail Box Selection, select a mail box to access Message Summary.


012401 Message Summary
Tools Help
ORACLE JD Edwards World
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
More Details
Renumber Sequence N
Display All Messages/F
Clear Screen

012401 Message Summary

Thru Date 19.09.06

Status ☐ Sequence ☐

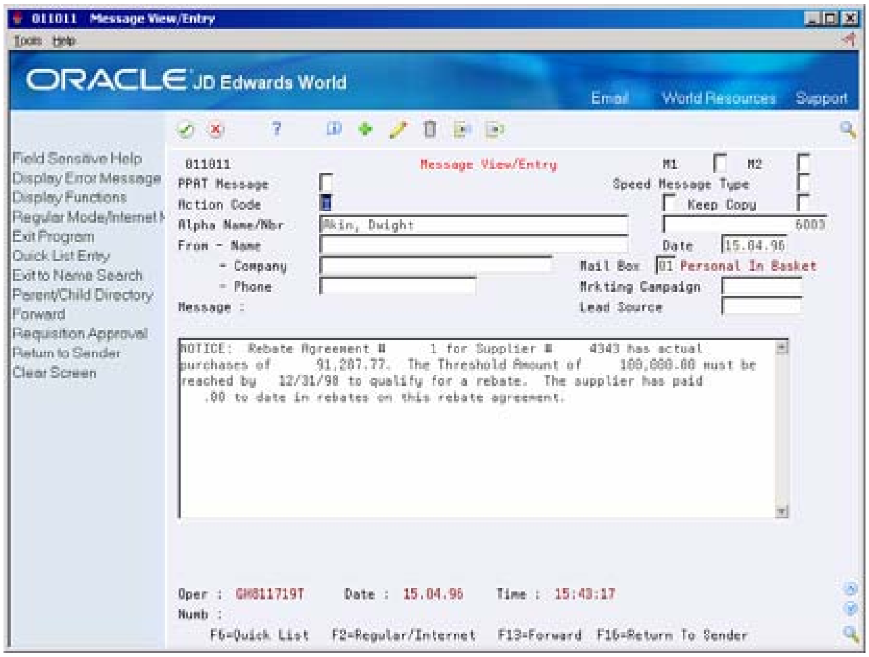
Alpha Name/Nbr Akin, Dwight 6003

DISPLAY ALL MODE

O	From	Brief Message	Phone
🟩		Please bring two extra copies of the mee	
🟩		NOTICE: Rebate Agreement # 1 for $	
🟩	Allen, Ray	I need to reschedule our 2 pm meeting to	
☐	Williams, Wendy	Dwight--	
🟩	Marchiano, Jay	Missing files	
☐	Williams, Wendy	Dwight,	
☐			

Opt: 1=View/Entr Msg 4=Dlt Msg 5=Dist 9=Archv F8=Renumber F24=More

3. On Message Summary, choose View / Enter Message.


011011 Message View/Entry
Tools Help
ORACLE JD Edwards World
Email World Resources Support
Field Sensitive Help
Display Error Message
Display Functions
Regular Mode/Internet M
Exit Program
Quick List Entry
Exit to Name Search
Parent/Child Directory
Forward
Requisition Approval
Return to Sender
Clear Screen
F6=Quick List F2=Regular/Internet F13=Forward F16=Return To Sender

011011 Message View/Entry

PPAT Message ☐

Action Code ☐

Alpha Name/Nbr: Akin, Dwight 6003

From - Name

- Company

- Phone

M1 ☐ M2 ☐

Speed Message Type ☐

Keep Copy ☐ ☐

Date 15.04.96

Mail Box 01 Personal In Basket

Mrkting Campaign

Lead Source

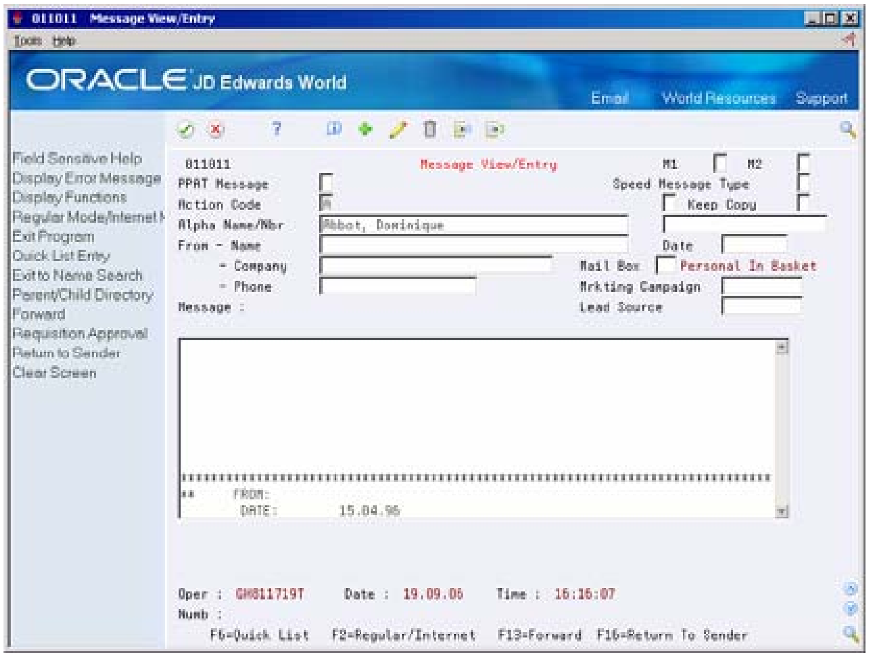
Message :

```
NOTICE:  Rebate Agreement #      1 for Supplier #     4343 has actual
purchases of      91,207.77.  The Threshold Amount of     100,000.00 must be
reached by   12/31/98 to qualify for a rebate.  The supplier has paid
   .00 to date in rebates on this rebate agreement.
```

Oper : GH811719T Date : 15.04.96 Time : 15:43:17

Numb :

4. On Message View / Entry, choose the Forward (F13).


011011 Message View/Entry
Tools Help
ORACLE JD Edwards World
Email World Resources Support
Field Sensitive Help
Display Error Message
Display Functions
Regular Mode/Internet M
Exit Program
Quick List Entry
Exit to Name Search
Parent/Child Directory
Forward
Requisition Approval
Return to Sender
Clear Screen
F6=Quick List F2=Regular/Internet F13=Forward F16=Return To Sender

011011 Message View/Entry

PPAT Message ☐

Action Code A

Alpha Name/Nbr: Abbot, Dominique

From - Name

- Company

- Phone

M1 ☐ M2 ☐

Speed Message Type ☐

Keep Copy ☐ ☐

Date

Mail Box ☐ Personal In Basket

Mrkting Campaign

Lead Source

Message :

```
************************************************************************
**      FROM:
         DATE:         15.04.96
```

Oper : GH811719T Date : 19.09.06 Time : 16:16:07

Numb :

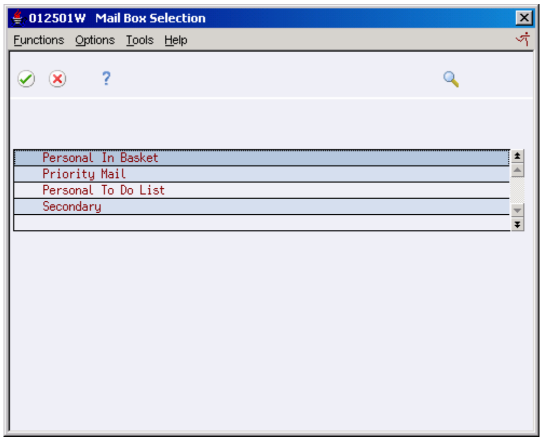
5. Complete one of the following fields:
    - Alpha Name
    - Alpha Number
6. If necessary, enter additional message text.

To return a message

If you want to respond to a message and return your response and the original message, you need to return the message to the original sender. This task is different from forwarding a message to another person.

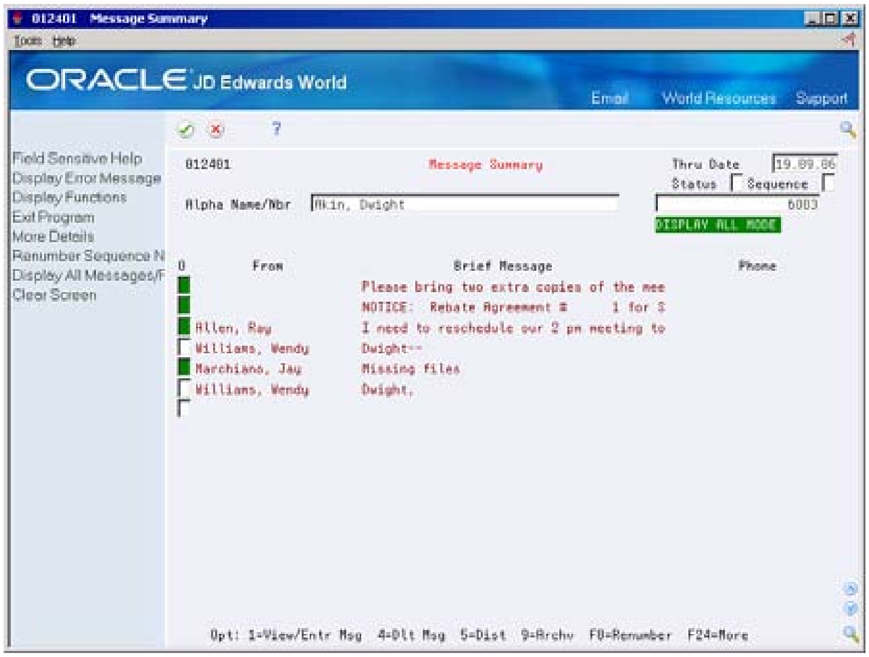
On Employee Mail Boxes

1. Choose See Memo.


012501W Mail Box Selection
Functions
Options
Tools
Help

Personal In Basket
Priority Mail
Personal To Do List
Secondary

2. On Mail Box Selection, select a mail box to access Message Summary.


012401 Message Summary
Tools
Help
ORACLE JD Edwards World
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
More Details
Renumber Sequence N
Display All Messages/F
Clear Screen

012401 Message Summary

Thru Date 19.09.06

Status ☐ Sequence ☐

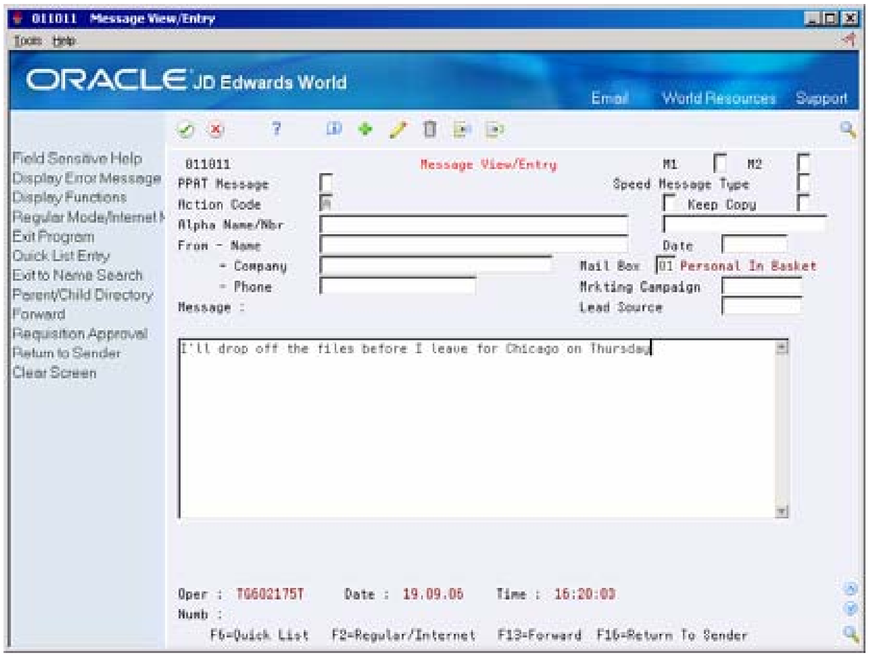
Alpha Name/Nbr Akin, Dwight 6003

DISPLAY ALL MODE

O	From	Brief Message	Phone
🟩		Please bring two extra copies of the mee	
🟩		NOTICE: Rebate Agreement # 1 for 3	
🟩	Allen, Ray	I need to reschedule our 2 pm meeting to	
☐	Williams, Wendy	Dwight--	
🟩	Marchiano, Jay	Missing files	
☐	Williams, Wendy	Dwight,	
☐			

Opt: 1=View/Entr Msg 4=Dlt Msg 5=Dist 9=Archv F8=Renumber F24=More

3. On Message Summary, choose View / Enter Message.
4. On Message View / Entry, type your response to the message.


01I011 Message View/Entry
Tools Help
ORACLE JD Edwards World
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Regular Mode/Internet M
Exit Program
Quick List Entry
Exit to Name Search
Parent/Child Directory
Forward
Requisition Approval
Return to Sender
Clear Screen

```
011011                  Message View/Entry              M1 ☐   M2 ☐
PPAT Message    ☐                                Speed Message Type ☐
Action Code     M                                ☐ Keep Copy        ☐
Alpha Name/Nbr
From - Name                                      Date
     - Company                          Mail Box 01 Personal In Basket
     - Phone                            Mrkting Campaign
Message :                               Lead Source

I'll drop off the files before I leave for Chicago on Thursday

Oper : TG602175T     Date : 19.09.06     Time : 16:20:03
Numb :
     F6=Quick List   F2=Regular/Internet   F13=Forward   F16=Return To Sender
```

5. Choose Return to Sender (F16).

To route future mail by setting the mail filter

	From Electronic Mail (G02), choose **Employee Mail Boxes**

Electronic mail received from a specific address or distribution list may be automatically assigned to a Priority Mail or Junk Mail category. When redirecting future mail to a Priority or Junk Mail category, the current message, as well as all future mail from that address or distribution list, will be routed to the assigned mail box. For example, if a message is received from your manager and you would like all future mail from this person to go directly to your Priority Mail Box, select Redirect Future Mail to Priority Mail next to the message. This creates a record in the User Filters of Incoming Mail file (F01136) for that particular address number.

You must receive a message before you can reroute future mail to a mail box category. These categories include:

- Priority mail
- Junk mail

After you have received a message from a particular address or distribution list, you can assign that address or list to a mail box category. The current message as well as all future mail from that address or distribution list is routed to the assigned mail box.

On Employee Mail Boxes

1. Choose See Memo.
2. On Mail Box Selection, select a mail box.
3. On Message Summary, locate the message you want to route.

4. In the Option field next to the message, press F1.
5. On Available Functions / Options, choose one of the following:
    - Redirect Future Mail to Priority Mail
    - Redirect Future Mail to Junk Mail

   The system directs future mail from the address associated with the message to the mail box category.

What You Should Know About

Directing a message to a mail box category	You can direct a message to someone to the priority or junk mail box category. To do this, enter the mail box user defined code (UDC table 02 / MB) in the Mail Box field on Message / View Entry before you send the message.
Directing messages to yourself	You can direct messages to yourself by setting up a mail box user defined code (02 / MB) for a personal to-do list.
Electronic mail boxes user defined codes (UDC)	User Defined Code (UDC) table 02 / MB contains valid values for mail box designators (MBDS). In the special handling code of the UDC table 02 / MB, values of 3 and 4 designate the filter mailboxes. If a 3 is in the special handling code for the UDC value, this will be the mail box designated the Reroute Future Mail to Priority Mail option is used. If a 4 is in the special handling code for the UDC value, this will be the mail box designated when the Reroute Future Mail to the Junk Mail option is used. There can only be one mail box designated with a handling code of 3 and one designated with a special handling code of 4 within the UDC 02 / MB.

To deactivate mail re-routing

If you decided to no longer redirect messages from certain people or distribution list, you can choose to stop directing messages to a mailbox.

On Employee Mail Boxes

1. Choose See Memo to access mail Box Selection.
2. On Mail Box Selection, select a mail box to access Message Summary.
3. On Message Summary, locate the message to re-route.
4. On the Option field next to the message, choose Remove Mail Filter (option 6).

Future mail from this address book or distribution list will go to the mailbox designated on Message / View Entry (V011011). The record in the User Filters of Incoming Mail (F01136) file is deleted.

Although future mail will be re-routed, mail already received and currently in specific mailboxes will remain in the mailbox. To move existing mail to a different mail box, follow the instructions below:

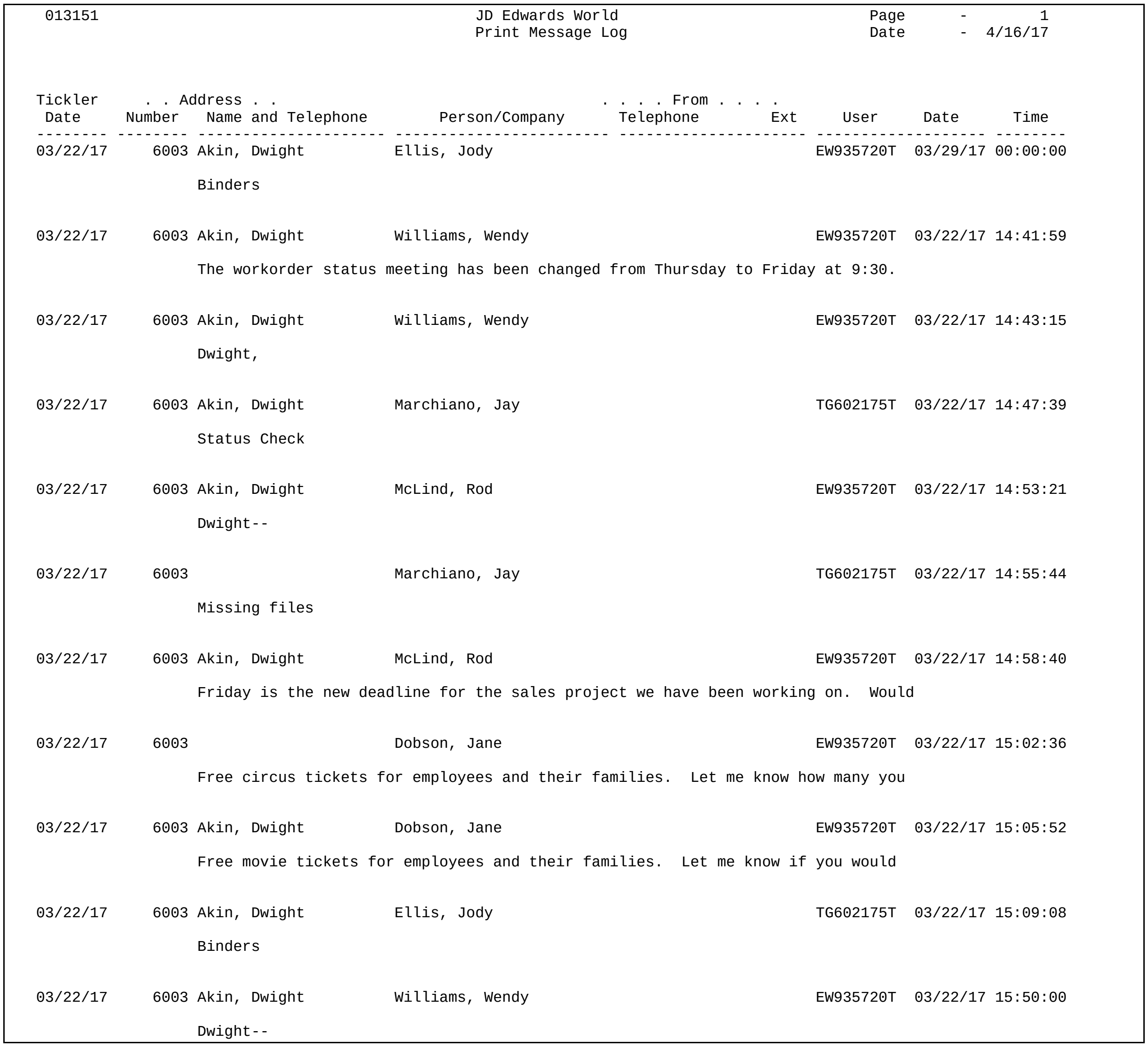
1. Access the message in Message / View Entry (P011011).

2. Type the new Mail Box (MBDS) value that designates the desired destination mail box.
3. Use the Change action
4. Press Enter.

To print a message log

From Electronic Mail (G02), choose **Print Message Log**

The message log lists all current and closed (non-purged) messages. You can set up versions that print only certain types of messages, such as priority messages. It is helpful to print this report before you purge messages from the Message Header table (F01131).



```
 013151                                          JD Edwards World                           Page      -        1
                                                 Print Message Log                          Date      -  4/16/17



Tickler     . . Address . .                                    . . . . From . . . .
 Date     Number   Name and Telephone        Person/Company      Telephone        Ext     User     Date      Time
-------- -------- -------------------- ------------------------ --------------------- -------------------- --------
03/22/17     6003 Akin, Dwight          Ellis, Jody                                   EW935720T  03/29/17 00:00:00

                  Binders


03/22/17     6003 Akin, Dwight          Williams, Wendy                               EW935720T  03/22/17 14:41:59

                  The workorder status meeting has been changed from Thursday to Friday at 9:30.


03/22/17     6003 Akin, Dwight          Williams, Wendy                               EW935720T  03/22/17 14:43:15

                  Dwight,


03/22/17     6003 Akin, Dwight          Marchiano, Jay                                TG602175T  03/22/17 14:47:39

                  Status Check


03/22/17     6003 Akin, Dwight          McLind, Rod                                   EW935720T  03/22/17 14:53:21

                  Dwight--


03/22/17     6003                       Marchiano, Jay                                TG602175T  03/22/17 14:55:44

                  Missing files


03/22/17     6003 Akin, Dwight          McLind, Rod                                   EW935720T  03/22/17 14:58:40

                  Friday is the new deadline for the sales project we have been working on.  Would


03/22/17     6003                       Dobson, Jane                                  EW935720T  03/22/17 15:02:36

                  Free circus tickets for employees and their families.  Let me know how many you


03/22/17     6003 Akin, Dwight          Dobson, Jane                                  EW935720T  03/22/17 15:05:52

                  Free movie tickets for employees and their families.  Let me know if you would


03/22/17     6003 Akin, Dwight          Ellis, Jody                                   TG602175T  03/22/17 15:09:08

                  Binders


03/22/17     6003 Akin, Dwight          Williams, Wendy                               EW935720T  03/22/17 15:50:00

                  Dwight--
```

Processing Options

See Message Log (P012501).

Work with Message Features

Working with Message Features

	From the Electronic Mail menu (G02), choose **Employee Mail Boxes**

The Electronic Mail system allows you to view the status of messages in a particular mailbox and change the sequence of your messages.

Working with message features consists of:

- Viewing messages with the same status
- Changing a message sequence

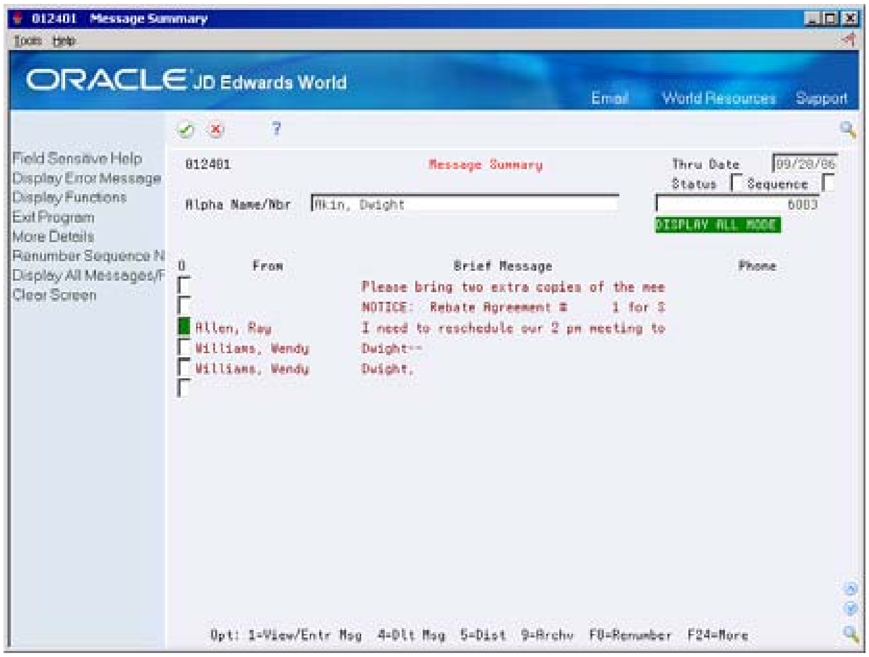
To view messages with the same status

You can access and view e-mail for a particular mail box while the mail is in any of the following statuses:

- Unopened
- Opened
- Revised
- Archived

On Employee Mail Boxes

1. Choose See Memo to access Message Summary.


012401 Message Summary
Tools Help
ORACLE JD Edwards World
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
More Details
Renumber Sequence N
Display All Messages/F
Clear Screen

```
012401                    Message Summary                 Thru Date  09/28/06
                                                          Status     Sequence
Alpha Name/Nbr   Akin, Dwight                                            6003
                                                          DISPLAY ALL MODE

O       From                 Brief Message                                 Phone
                             Please bring two extra copies of the mee
                             NOTICE:  Rebate Agreement #      1 for 3
  Allen, Ray                 I need to reschedule our 2 pm meeting to
  Williams, Wendy            Dwight--
  Williams, Wendy            Dwight,

Opt: 1=View/Entr Msg  4=Dlt Msg  5=Dist  9=Archv  F0=Renumber  F24=More
```

2. On Message Summary, complete the following field:

- Status

Field	**Explanation**
Status - Electronic Mail Message	Indicates the current status of the mail message. 1 Revised - The message has been changed. 2 Unopened - The message has not been viewed. 3 Opened - The message has been viewed. 4 Archived - The message has been saved and stored.

To change a message sequence

You might want to view your messages in a certain order. You can choose the sequence in which your messages appear after they arrive in your mailbox.

On Employee Mail Boxes

1. Choose See Memo to access Mail Box Selection.

2. On Mail Box Selection, select a mailbox to access Message Summary.

3. On Message Summary, complete the following field:

- Sequence

Field	Explanation
Sequence	Controls the sequence of information that displays. Values are: blank View the newest messages first (descending date order) 1 View the newest messages last (ascending date order) 2 View the messages in sequential order If the messages have not been sequenced, the system displays them in the order of arrival.

What You Should Know About

Sequence number values	The sequence number values in the detail area are valid only when the sequence is 2.

Work with Bulletin Boards

Working with Bulletin Boards

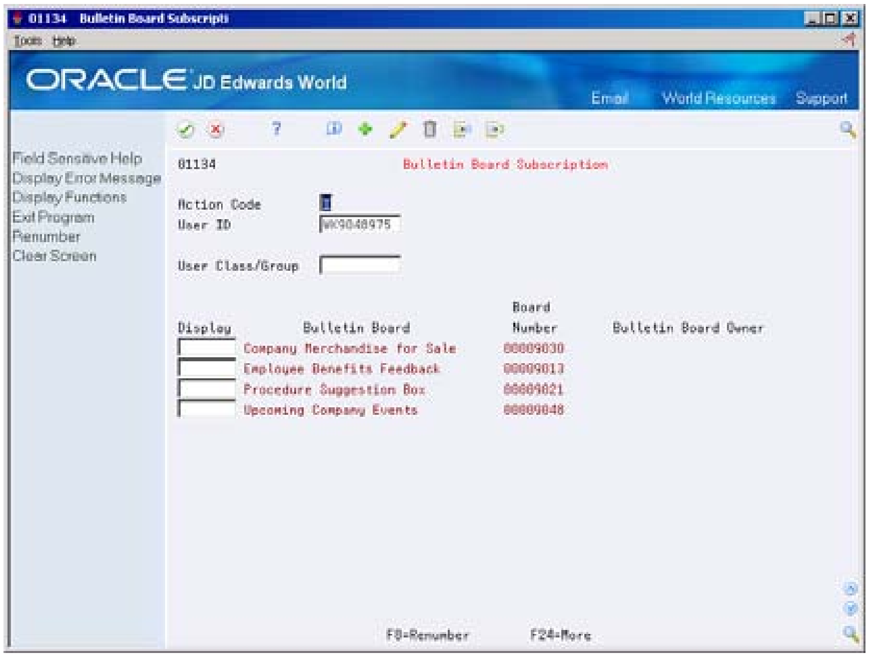
You can post a message in a central area where it can be viewed by users who subscribe to the corresponding bulletin board. Bulletin boards can be used as a central repository for messages, such as *Procedure Suggestion Box* or *Upcoming Company Events*, to a group of users. They can also be used to organize and track information related to a project.

Working with bulletin boards consists of:

- Subscribing to a bulletin board
- Accessing a bulletin board

To subscribe to a bulletin board

From the Electronic Mail menu (G02), choose **Bulletin Board Subscription**


01134 Bulletin Board Subscripti
Tools Help
ORACLE JD Edwards World
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Exit Program
Renumber
Clear Screen
F8=Renumber
F24=More

01134 Bulletin Board Subscription

Action Code
User ID WK9048975
User Class/Group

Display	Bulletin Board	Board Number	Bulletin Board Owner
	Company Merchandise for Sale	00009030	
	Employee Benefits Feedback	00009013	
	Procedure Suggestion Box	00009021	
	Upcoming Company Events	00009048	

On Bulletin Board Subscription

1. Complete the following field:

- Display

2. Use the Change action.

Field	Explanation
Display Sequence	A number that reorders a group of records on the form. *Form-specific information* Placing a sequence number in this field will subscribe the user to the bulletin board.

What You Should Know About

Assigning an administrator to a bulletin board	You can assign an administrator or owner to a bulletin board. The administrator is the only person authorized to change or delete bulletin board postings. To assign an administrator, enter the address number in the Reference Address 1 field for the bulletin board address record on Address Book Revisions.
Identifying a bulletin board	When you create a bulletin board, you identify it as an internal bulletin board by using search type MB.
Removing your name from a bulletin board subscription list	To remove your name from a bulletin board subscription list, remove the display sequence value.

To access a bulletin board

From the Electronic Mail menu (G02), choose Employee Mail Boxes

On Employee Mail Boxes

1. Choose See Memo to access Mail Box Selection.
2. On Mail Box Selection, toggle to Bulletin Board / Mail Box.
3. On Bulletin Boards, select a bulletin board.

What You Should Know About

Viewing postings	On Bulletin Boards, you can view a posting by choosing View / Enter Message. In addition, you can add a posting by choosing the appropriate option in the last Option field.
Accessing the bulletin board	You can toggle to the bulletin board list directly from Employee Mail Boxes.

Bulletin board display sequences

The order in which the bulletin board fields are sequenced is the order in which they display when you access the bulletin board.

Assign E-Mail User Defined Codes

Assigning E-Mail User Defined Codes

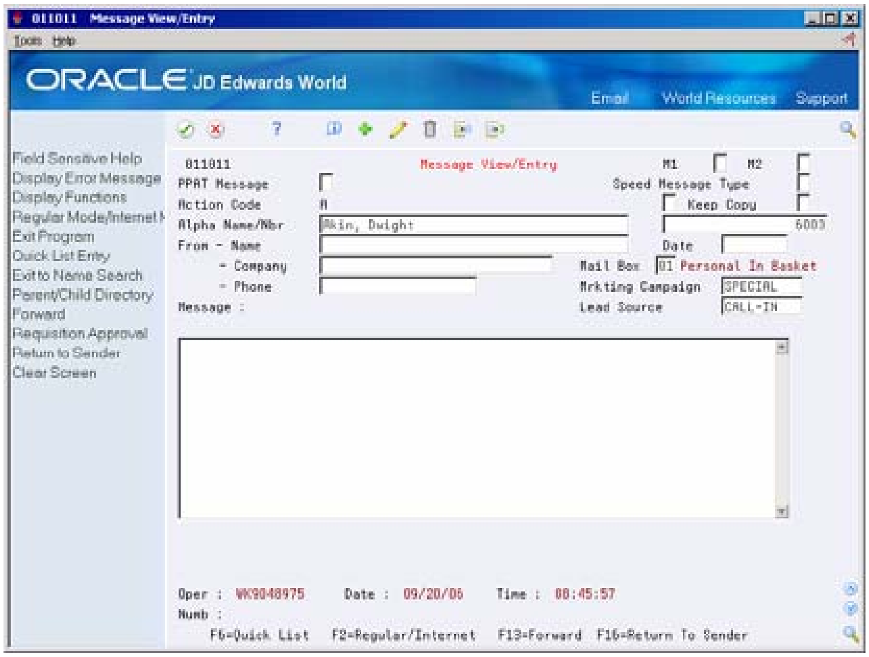
	From the Electronic Mail menu (G02), choose **Employee Mail Boxes**

The system provides two fields that you can use to add more detail to your e-mail messages. These fields are user defined (02/MC and 02/LS). For example, you might create a field for Marketing Campaign or Lead Source. You can change the values for these fields by accessing a list of optional codes.

To assign e-mail user defined codes

On Employee Mail Boxes

1. Choose Send Memo to access Message View/Entry.


011011 Message View/Entry
Tools Help
ORACLE JD Edwards World
Email
World Resources
Support
Field Sensitive Help
Display Error Message
Display Functions
Regular Mode/Internet M
Exit Program
Quick List Entry
Exit to Name Search
Parent/Child Directory
Forward
Requisition Approval
Return to Sender
Clear Screen
F6=Quick List
F2=Regular/Internet
F13=Forward
F16=Return To Sender

011011 Message View/Entry

PPAT Message ☐

Speed Message Type ☐

M1 ☐ M2 ☐

Action Code A

Keep Copy ☐

Alpha Name/Nbr Akin, Dwight 6003

From - Name

- Company

- Phone

Date

Mail Box 01 Personal In Basket

Mrkting Campaign SPECIAL

Lead Source CALL-IN

Message :

Oper : WK9048975 Date : 09/20/06 Time : 08:45:57

Numb :

2. On Message View/Entry, complete the following fields:
   - Marketing Campaign
   - Lead Source

Field	Explanation
Category Code - E-mail	One of two reporting codes that you can assign to a message in the E-mail system.

What You Should Know About

User defined code list	In the data dictionary, you can change the user defined code list used by this program to a different list.

11 Processing Options

Address Book Maintenance Processing Options

Address Book Revisions (P01051)

Processing Option	Processing Options Requiring Further Description
AUDIT LOG FILE: 1. Enter a '1' to utilize the Audit Log file (F0101A).	
ADDITIONAL INFORMATION ENTRY: Enter a '1' to automatically enter the following information on an add: 2. Category Code Information. 3. Customer/Supplier Information. **Note:** This option is based on the Receivables/Payables fields in Address Book. A warning will occur if both fields have a value of 'N'. 4. Address Book Control Revisions. 5. Related Address Numbers	
MAILING ADDRESS WINDOW: 6. Enter the type code of the Who's Who attention name which will appear in the Mailing Address Window. If left blank (default), the attention name line will not be included in the mailing address.	
MAILING ADDRESS IN WHO'S WHO: 7. Enter '1' to protect the actual Address Book Mailing Name (IDLN = 0) from change on the Who's Who screen. If left blank, you may change all Mailing Names in Who's Who.	

Processing Option	Processing Options Requiring Further Description
DREAM WRITER VERSIONS:	
Enter the version for each program: If left blank, ZJDE0001 will be used. 8. Name Search (P01200) 9. A / R Information (P01053) 10 A / P Information (P01054) 11. Parent / Child Struc. Inq. (P01270) 12. Control Revisions (P010513)	
PHONE NUMBER DISPLAY: 13. Enter the phone type to display on the first phone number display. 14. Enter the phone type to display on the second phone number display. If left blank, the first 2 phone numbers for the customer will be displayed.	
DUPLICATE DATA VERIFICATION: 15. Enter one of the following values to control duplicate data entry. The Alpha Name, Postal Code and City fields will be used to determine a potential duplication. blank = No Duplicate Check 1 = Hard Error 2 = Warning	
POSTAL CODE WARNING: 16. Enter one of the following to receive a warning if the Postal Code is not found in the Postal Code file (F0117) and no info is returned: blank = No warning issued. '1' = Warning if City left blank. '2' = Warning if City OR County left blank.	

Address Book Reports and Mailing Labels Processing Options

Reports by Address (P01301)

Processing Option	Processing Options Requiring Further Description
ADDRESS BOOK REPORTS W/OUT WHO'S WHO: 1. Select the format you wish to print. 1 - Mailing Labels 1A - Mailing Labels/Bulk (Address Format 04 Only) 2 - One Line per Address 3 - Full Address w/o Codes and Notes 4 - Full Address w/ Codes and Notes 9 - Mailing Labels w/Address number and Phone number 9A - Mailing Labels w/Address number 9B - Mailing Labels w/Phone number **Note:** When running Form 3 the based on file must be the F0101JB. All other forms must be based on the F0101JC.	
PAGE BREAK: 2. Enter 1 to skip to a new page when the first alpha character changes. Default of blank will not page break.	
GENERIC TEXT: 3. Enter a '1' to print the Address Book Generic Text in a 40 character width, a '2' to print text in an 80 character width. If left blank, Generic Text will not be printed.	

Processing Option	Processing Options Requiring Further Description
FORMAT OVERRIDE: 4. Enter the Address Format ID to be used for labels. If left blank, the format ID associated with the address book country will be used. **Note:** If you are printing Bulk Mail Labels, the override entered will not be used.	
TYPE OF PRINTER: 5. Enter a '1' if you are using a laser printer to print your labels. Default of blank indicates you are using a dot matrix printer.	
CHARACTERS PER INCH: 6. Enter a '1' if you want your dot matrix printer to print with 15 characters per inch and 40 character labels. Default of blank will set your dot matrix printer to 10 characters per inch and 32 character labels.	

One Line per Address – Who's Who (P01402W)

Processing Option	Processing Options Requiring Further Description
Not applicable the first alpha character changes. Default of blank will not cause a page break. Not applicable Enter a '1' to include the Who's Who contact list for each address number. Default of blank will not include any Who's Who contacts.	

Check Duplicates – Name, Postal Code, Phone (P014052)

Processing Option	Processing Options Requiring Further Description
ALPHA NAME DUPLICATES: 1. Enter the number of characters, up to 25, to be considered when searching for duplicate Alpha Names.	
DUPLICATES WITHIN ALPHA NAME: 2. Enter a '1' on the lines below to search for duplicates of the Postal Code and / or Phone Number within the same Alpha Name. If left blank, that field will not be used to search for duplicates. If both are chosen, both must be duplicates for selection. Postal Codes Phone Numbers	
WHO'S WHO INFORMATION: 3. Enter a '1' to print the Who's Who contact title field. If left blank, no contact titles will print.	

Print Audit Log (P01430)

Processing Option	Processing Options Requiring Further Description
CATEGORY CODES: 1. Enter a '1' to print the Category Codes 11 through 20. 2. Enter a '1' to print the Category Codes 21 through 30.	
REPORT SELECTION: 3. Enter a '1' to bypass the print of the indicated report. If left blank, the report will print. Address Book Information R014301 Category Code Information R014302 A / R and A / P Information R014303	

Mailing Labels Print – Who's Who (P01401W)

Processing Option	Processing Options Requiring Further Description
Not applicable Not applicable Enter a '1' to include the Who's Who contact list for each address number. Default of blank will not include any Who's Who contacts.	

Cheshire Labels (P01401C)

Processing Option	Processing Options Requiring Further Description
REPORT FORM: 1. Select ONE of the following forms: 1 - Regular Labels 2 - Labels w/Address Number 3 - Labels w/Phone Number 4 - Labels w/Address Number and Phone Number 5 - Labels w/ Memo	
FORMAT OVERRIDE: 2. Enter the address format ID to be used for labels. If left blank, the format ID associated with the address book country will be used.	

Cheshire Labels - Dun/Bradstreet (P01401C1)

Processing Option	Processing Options Requiring Further Description
REPORT FORM:	

Processing Option	Processing Options Requiring Further Description
1. Select ONE of the following forms: 1 - Regular Labels 2 - Labels w/Address Number 3 - Labels w/Phone Number 4 - Labels w/Address Number and Phone Number	
FORMAT OVERRIDE: 2. Enter the address format ID to be used for labels. If left blank, the format ID associated with the address book country will be used.	

Build Address Book Reporting File (P01901)

Processing Option	Processing Options Requiring Further Description
FILE MAINTENANCE: 1. Enter a '1' to clear the file before processing. Default of blank will update the file.	

System Setup Processing Options

General User-Defined Codes (P0005A

Processing Option	Processing Options Requiring Further Description
DEFAULT CODE / TYPE: 1. Enter the desired Install System Code. 2. Enter the desired Record Type.	

Parent/Child Relationships Processing Options

Address Book Organization Structure Revisions (P0150)

Processing Option	Processing Options Requiring Further Description
PRE-LOADED DATA SELECTIONS: 1. Any values entered in the following options will be loaded upon entry into the program: Organization Structure Type Parent / Child (0 / 1)	

Structure Print (P01425)

Processing Option	Processing Options Requiring Further Description
OUTPUT MODE: 1. Enter output mode to print: ' ' = Parent / Child mode (default) '1' = Child / Parent mode '2' = Print entire tree structure(s) that the given address number is included in.	
SUBSTRUCTURE SUPPRESSION: 2. Enter a '1' to suppress printing substructures that are a part of a larger structure. If left blank, all substructures within a structure will be printed.	
NUMBER OF LEVELS TO PRINT:	

Processing Option	Processing Options Requiring Further Description
3. Enter the maximum number of levels to be printed up to 25. If left blank, the default is 25.	
ALIGN LEVELS: 4. Enter a '1' to align the level numbers. If left blank, the level numbers will be indented.	
BYPASS DUPLICATE ADDRESS NUMBERS: 5. Enter a '1' to bypass the printing of duplicate address numbers. If left blank, duplicate address numbers in the structure will be printed.	
EFFECTIVE DATE: 6. Enter an effective date for the structure. If left blank, the effective date will be the current date.	

Address Book Supplemental Data Processing Options

Define Type of Data - CORE (P01090)

Processing Option	Processing Options Requiring Further Description
Enter the search type that you wish to review. (Default of blank will load Type of data for all search types).	

Supplemental Data Work File Build (P01460)

Processing Option	Processing Options Requiring Further Description
EFFECTIVE DATE: 1. Enter the effective date for selecting Data Type Values / Amounts. If left blank the current date will be used.	
DATA TYPE SELECTION:	

Processing Option	Processing Options Requiring Further Description
2. Enter the Data Types which should be included in the work file. Data Type 1 Data Type 2 Data Type 3 Data Type 4 Data Type 5 Data Type 6 Data Type 7 Data Type 8 Data Type 9 Data Type 10	
RECORDS TO INCLUDE: 3. Enter a '1' if all address book records should be placed in the file even if they do not have supplemental data. A default of blank will only include those that have supplemental data.	

Address by Data Type (P01440)

Processing Option	Processing Options Requiring Further Description
Enter a 'N' to bypass printing text information on the report. Default of blank will print the text.	

Supplemental Data (P01450)

Processing Option	Processing Options Requiring Further Description
Enter an 'N' to bypass printing text information on the report. Default of blank will print the text.	

Address Batch Processing – Processing Options

Address Book Batch Maintenance (P0101Z1)

Processing Option	Processing Options Requiring Further Description
BATCH FILE REVIEW: 1. Enter a '1' to view the Batch Review screen prior to working with the Batch Address Book Entry. A default of blank will take you directly to the Entry screen. 2. Enter a '1' to display the EDI (Electronic Data Interchange) fields on the Batch Review screen.	
A/R and A/P INFORMATION: 3. Enter '1' next to the application screens you would like to see appear automatically when adding or changing batch address book records. If left blank, no additional information will be displayed. Accounts Receivable Accounts Payable	

Address Book Batch File Processing (P01110Z)

Processing Option	Processing Options Requiring Further Description
PROOF OR FINAL MODE:	

Processing Option	Processing Options Requiring Further Description
1. Enter a '1' to process the batch information in Final mode. If left blank, the batch processing will be performed in Proof mode and no file updates will occur.	
AUTOMATIC PURGE: 2. Enter a '1' to automatically purge processed transactions from the batch file. If left blank, transactions will be flagged as processed and will remain in the file.	
ERROR REPORT: 3. Enter a '1' to suppress the printing of error / update reports. If left blank, reports will be printed.	
ERROR FILE: 4. Enter a '1' to write error messages out to the PC Batch Entry Error file (F0040). If left blank, no records will be written to the file.	
SUPPRESS WARNINGS: 5. Enter a '1' to suppress the printing of warnings on the error report and in the PC Batch Entry Error file. If left blank, warnings will print on the error report and be placed into the error file.	
DW VERSION FOR ADDRESS BOOK PROCESSOR: 6. To override standard Address Book processing (DREAM Writer XT0101Z1, version ZJDE0001), enter an override version number. This should only be changed by persons responsible for system wide setup.	
MULTIPLE CONTACTS / PHONES:	

Processing Option	Processing Options Requiring Further Description
7. Enter '1' to process the Address Book record even if errors are found in the additional Who's Who (F0111Z1) or additional Phone Number (F0115Z1) records associated with this address. If left blank, any error found will prevent creation of the new Address Book number.	
8. Enter '1' if you are providing Line Numbers for add'l Who's Who contacts (program will NOT default the IDLN value) and would like us to UPDATE Line = 0 (main contact) information. If left blank, we will assume all additional contacts with IDLN = 0 are new contacts that need to have the Line Number (IDLN) assigned.	
9. Enter '1' to bypass Additional Who's Who edits (Title, Salutation Name, Cat Codes 1-10, etc.) for 'Blanks Invalid' error. This assumes that you are not sending in data for these additional fields. If the fields are non-blank, they will be edited, regardless of this processing option. If left blank, all edits will occur.	

Batch File Purge (P00PURGE)

Processing Option	Processing Options Requiring Further Description
SAVE PURGED RECORDS: 1. Enter a '1' to save the purged records to a special purge library. (Default of blanks will NOT save any purged records.)	
REORGANIZE FILE: 2. Enter a '1' to reorganize the purged file. (Default of blanks will NOT reorganize the file.)	

Updates and Purges Processing Options

Global Address Book Update (P01490)

Processing Option	Processing Options Requiring Further Description
Enter the data value to be replaced or "plugged" into the selected Address Book fields (*BL = blanks):	
1. Category Code 1 (3 character)	
2. " " 2 (" ")	
3. " " 3 (" ")	
4. " " 4 (" ")	
5. " " 5 (" ")	
6. " " 6 (" ")	
7. " " 7 (" ")	
8. " " 8 (" ")	
9. " " 9 (" ")	
10. " " 10 (" ")	
11. " " 11 (" ")	
12. " " 12 (" ")	
13. Category Code 13 (3 character)	
14. " " 14 (" ")	
15. " " 15 (" ")	
16. " " 16 (" ")	
17. " " 17 (" ")	
18. " " 18 (" ")	
19. " " 19 (" ")	

Processing Option	Processing Options Requiring Further Description
20. " " 20 (" ")	
21. " " 21 (" ")	
22. " " 22 (" ")	
23. " " 23 (" ")	
24. " " 24 (" ")	
25. " " 25 (" ")	
26. " " 26 (" ")	
27. " " 27 (" ")	
28. " " 28 (" ")	
29. " " 29 (" ")	
30. " " 30 (" ")	
31. S.I.C. Code (10 ")	
32. Employee (1 ")	
33. Supplier (1 ")	
34. Customer (1 ")	
35. Business Unit (12 ")	
36. Credit Message (2 ")	
37. Search Type (3 ")	
38. Tax ID (20 ")	
39. Person / Corp Code (1 ")	

Address Book Purge (P01800)

Processing Option	Processing Options Requiring Further Description
PROOF OR FINAL MODE: 1. Enter a '1' to process the information in Final mode. If left blank, the processing will be performed in Proof mode and no file updates will occur.	

Processing Option	Processing Options Requiring Further Description
PRINT REPORT INFORMATION: 2. Enter a '1' to print the report information of the Address Book records which were deleted.	
ONE-TIME VENDORS: 3. Enter a '1' to purge One-Time vendors regardless of existing A/P ledger transactions. If left blank, regular edits will be performed before the purge is permitted.	This applies to address book records that have an 'M' designated in the Payables flag. This flag classifies the supplier as a miscellaneous, one-time supplier.

Electronic Mail Processing Options

Message Log (P012501)

Processing Option	Processing Options Requiring Further Description
DEFAULTS: 1. Enter defaults desired for display: Search Type (e.g., E=Employee) Branch or Location (Category Code 1) Salesman (Category Code 2) Territory (Category Code 3) Category Code 04	
PRELOADING OF USER NAME: 2. To use this feature, you must have each user's Address Book number set up in User Information (P0092). Enter "1" to activate preloading.	
DREAM WRITER VERSION:	
Enter the version for each program: If left blank, ZJDE0001 will be used. 3. Message Entry (P011011) 4. Message Log Inquiry (P012401) 5. Name Search (P01200) **Note:** Option 4 does NOT apply to Personal To Do List or Bulletin Boards.	

12 Appendices

Appendix A – Batch Input Setup

To successfully upload address book records into the Address Book - Batch Table (F0101Z1) from an outside source, such as PC data entry, a third-party system, or electronic data interchange (EDI), you must enter data into certain fields in the appropriate format.

The batch table consists of batch control fields and transaction fields. It is important to recognize the difference between these fields, as some fields (for example, batch number) seem to appear as both a batch control and a transaction field:

- Batch control fields temporarily identify transactions in the batch table, because permanent identification has not yet been established. These fields are assigned by you and go no further than the batch table.
- Transaction fields refer to the values that directly correlate with the fields in the JD Edwards World tables. These fields are assigned by the system during batch processing and are passed on to the JD Edwards World tables.

This section contains the following:

- Batch Control Information
- Transaction Information
- Technical Considerations
- DREAM Writer Considerations
- Address Book Field Instructions
- Table 1 - Required or Conditionally Required Fields
- Table 2 - Optional Control Fields
- Table 3 - Additional Fields
- Table 4 - Ignored Fields

Batch Control Information

Batch control allows unique identification for each record in the address book batch input table. Batch control fields are temporary control fields which include the following:

- User ID
- User Batch Number
- Transaction Number
- Transaction Type

On the Batch File Revisions form, these fields are separated from the actual transaction fields.

While transactions exist in the batch input table, the system considers any records with the same combination of values in User ID, User Batch Number, and Transaction Number to be one transaction.

Transaction Information

Transaction information consists of those fields that exist in the Address Book Master table (F0101). The system provides default values for many of the optional fields that you leave blank.

The following fields are required to create an address. All other fields can be blank, because the system will assign default values:

- Alpha Name
- Mailing Name
- Search Type

The following fields are required to delete an address. All other fields can be blank, and the system will use the appropriate values from the original address:

- Transaction Action
- Address Number

You cannot make changes to addresses that already exist in the Address Book Master table using batch input. You can make these changes using Address Book Revisions.

Technical Considerations

Batch tables consist of batch control fields which are used by the batch table processing programs, followed by transaction fields which directly reflect the corresponding JD Edwards World table layout.

Preassigned Address Numbers

You can allow the batch processing program to assign the address number by using the JD Edwards World next numbers facility. You can also assign the address number in advance, in order to facilitate a smooth transition between two systems. If you enter an address number in the transaction field, the batch processing program will use this number when creating the new transaction record.

You can generate the address number by using a custom next number program. If you do, be aware that some numbers you assign may have already been used if you also enter addresses interactively.

You can also generate the address number by accessing the JD Edwards World next numbers facility, obtain and reserve a valid next number, and assign this number to the batch input transaction.

Override Address Book Functional Server Version

There are processing options associated with the functional servers utilized by the batch processing programs. You can specify which version of the functional server to use when processing. In most cases, you should not change this option since functional server options should be set throughout the system in a variety of programs.

DREAM Writer Considerations

Processing Options

Option	Description
Proof or final mode	Proof mode: ▪ Prints the error/exception report with errors or warnings detected. ▪ Does not perform table updates. Final mode: ▪ Can print both an update and an error/exception report. ▪ Creates records in the Address Book Master table. You should use proof mode to detect any errors and make corrections prior to running final mode. To correct errors, do one of the following: ▪ Correct the batch file data at the source and regenerate the batch file on the AS/400. ▪ Directly update the individual batch records already on the AS/400 through the Address Book Batch File Maintenance program (P0101Z1). After making corrections, you must resubmit your version of batch file processing. Previously processed records are bypassed.
Purge processed records	A processing option indicates if you want to purge after processing: Blank The system flags successfully processed records as Processed in the batch table. 1 The system deletes transactions after they are successfully processed. When transactions are not purged at processing time, you must use the Address Book Batch File Purge program (P00PURGE) to globally delete all processed addresses in the Address Book Batch Input table.

Option	Description
Error file	In addition to printing an error/exception report, you might choose to write all errors and warnings to the PC Error file (F0040). This file can be used to download the error information to the PC after processing is complete.

Data Selection

You can use any criteria, such as user ID, a range of transaction numbers, and so on, to select transactions to be included in this batch.

Data Sequence

Do not change the data sequence. If you change the data sequence, processing will not run properly.

Address Book Field Instructions

Table 1 in this appendix lists the fields required by the Batch Address Processing program for uploading records. Tables 2 and 3 list optional fields that might be useful to you in organizing the data, but are not required by the program. Table 4 lists fields that the system ignores during the upload process. The functional server does not pass ignored fields to the JD Edwards World fields.

Each field in tables 1 - 3 is shown as required, conditional, or optional, as follows:

Code	Description
R (Required)	You must enter data in this field to successfully upload the records to the Address Book - Batch Table.
C (Conditional)	Under certain conditions, you must enter data into this field to successfully upload the records to the Address Book - Batch Table. The conditions are listed in the table under Explanation.
O (Optional)	You may enter data in this field.

Other information in the tables includes:

Information	Description
Value	The valid input value is edited. If no value is listed, you may enter any value that meets the field's alphanumeric specifications. If the table shows DD as the value, the system takes valid values from the data dictionary specifications for the data item. The system can validate data dictionary specifications against user defined codes, allowed values, or upper/lower allowed values. If a file or user defined code (xx/xx) is listed, the system validates the value you enter against that file or user defined code.
Default	The default value that the system assigns if you leave the field blank. If no default is listed, the system uses the initialization value for the data item, with blanks for alpha fields and zeros for numeric fields. If DD is listed, the system uses the default value for the data item from the data dictionary. You can revise some of the defaults through the functional server processing options (XT0101Z1).
Formats	▪ Julian date - The JD Edwards World Julian date format is CYYDDD, where C is the century (1900=0, 2000=1), YY is the year, and DDD is the day of the year. ▪ Numeric amounts - The data dictionary shows amounts with 0 data file decimals. The data item size includes the decimal values. For example, if the display decimals = 2, the file keeps $5.50 as 550. If display decimals = 0, the file keeps $1000 as 1000. ▪ Multi-currency - If you are working in a multi-currency environment, the system uses the company or account display decimals for ledger type AA (domestic), and the transaction currency code for ledger type CA (foreign).

Other special format considerations appear under Explanation for the specific field. If no format is listed, use the data dictionary specifications for the data item to enter the field.

Table 1 - Required or Conditionally Required Fields

The Address Book Batch Processing program (P01110Z) requires the fields in this table for adding or deleting address book records.

Field	Description	R C O	Explanation	Value	Default
EDTN	Transaction Number	R	The user transaction, address number, or sequential number for batch processing. This field, in combination with EDUS and EDBT, will uniquely identify an address book transaction. This field is required to add a record.		
EDBT	Batch Number	R	User assigned for processing		
ALPH	Alpha Name	R	Required to add a record.		
MLNM	Mailing Name	R	Required to add a record.		
AT1	Search Type	R	Required to add a record.	F0005 01/ST Search type security	DD
MLN1	Mailing Name	C	Required to add a record in double byte systems.	DD	
CRCA	Amount Currency	C	Required if multi-currency is activated.	F0013	DD
EDTC	Transaction Action	C	Required to delete a record (EDTC = D). Enter only one line to indicate the JD Edwards World address number to be deleted.	A = Add D = Delete Blank = Add	Blank
AN8	Address Number	C	Required to delete a record (EDTC=D). If you leave this field blank when you add a record, the system uses Next Numbers to assign an address book number. If you enter an address number, it must not already exist for an add, but must exist for a delete.	F0101 Address Number	Next Numbers

Field	Description	R C O	Explanation	Value	Default
DTAR	A / R Model JE DCT	C	Required if document and company exist.	F0005 00 / DT	DD
DCAR	A / R Model JE Doc	C	Required if document type and company exist.		
KCOR	A / R Model JE Company	C	Required if document and type exist.	F0010	
DTAP	A / P Model JE DCT	C	Required if document and company exist.	F0005 00 / DT	DD
DCAP	A / P Model JE Doc	C	Required if document type and company exist.		
KCOP	A / P Model JE Company	C	Required if document and type exist.	F0010	
MCUR	CC - A / R Default	C	Required if OBAR is entered.	F0006	DD
MCUP	CC - A / P Default	C	Required if OBAP is entered.	F0006XY	DD

Table 2 - Optional Control Fields

The fields in this table might be useful in processing and organizing batch data.

Field	Description	R C O	Explanation	Value	Default
EDUS	User ID	O	User defined ID number. This field, in combination with EDTN and EDBT, uniquely identifies a specific address book entry. PC processing uses this field as the PC terminal ID number.		

Field	Description	R C O	Explanation	Value	Default
EDAN	User Address Number	O	A number that you assign in the address book record when the actual address number is to be assigned by next numbers during batch processing. This number can be used in A/R Invoices or A/P Vouchers to link the new address number to those transactions.		
CRCD	Currency Code	O	If multi-currency is activated, the system edits this field. This is the default currency for customer entry and inquiry.	F0013	DD
CRRP	Currency Code	O	If multi-currency is activated, the system edits this field. This is the default currency for voucher entry and inquiry.	F0013	DD
TAX	Tax ID	O		DD	DD
TAXC	Person/Corporation Code	O		DD	DD
EXR1	Tax Explanation Code	O		F000500/EX	DD
EXR2	Tax Explanation Code 2	O		F000500/EX	DD
EXR3	Tax Explanation Code 3	O		F000500/EX	DD
TXA1	Tax Rate/Area	O	If you enter a code here, the system performs tax calculations.	DD	DD
TXA2	Tax Rate/Area 2	O		DD	DD
TXA3	Tax Rate/Area 3	O		DD	DD
TX1	European Company Tax ID	O			DD

Field	Description	R C O	Explanation	Value	Default
TX2	European Individual Tax ID	O			DD

Table 3 - Additional Fields

The fields in this table are optional. You can use them to provide additional information about the address book records. Some of these fields are for future use with EDI processing.

Field	Description	R C O	Explanation	Value	Default
EDTY	Record Type	O			
EDSQ	Record Sequence	O			
EDCT	Transaction Type	O			
EDLN	Line Number	O			
EDST	Transaction Set	O	Future EDI field.	A standard EDI set number	
EDFT	Translation Format	O	Future EDI field.	A valid translation format set up through the third-party translators for EDI	
EDDT	Transmission Date	O		Valid calendar date	Date processed .Format: YYMMDD
EDER	Send / Receive Indicator	O		DD	
EDDL	Number of Detail Lines	O	Number of detail lines in the specific transaction. For user verification only. For address book, this should always be 1.	1	

Field	Description	R C O	Explanation	Value	Default
EDSP	Processed (0/1)	O	If processed (1), this transaction will be bypassed for batch processing.	0 = No 1 = Yes	0
EDTR	Transaction Type	O	Not used for address book.		
EDGL	Create G/L Record	O	Future use.		
MCU	Business Unit	O		F0006	Business Unit 1
AR1	Area Code	O		DD	DD
PH1	Phone Number	O			DD
AR2	Area Code 2	O		DD	DD
PH2	Phone Number	O			DD
AC01	Location or Branch	O	User defined reporting code.	F0005 01/01	
AC02	Salesperson	O	User defined reporting code.	F0005 01/02	
AC03	Sales Territory	O	User defined reporting code.	F0005 01/03	
AC04	Category Code 4	O	User defined reporting code.	F0005 01/04	
AC05	Category Code 5	O	User defined reporting code.	F0005 01/05	
AC06	Category Code 6	O	User defined reporting code.	F0005 01/06	
AC07	Category Code 7	O	User defined reporting code.	F0005 01/07	
AC08	Category Code 8	O	User defined reporting code.	F0005 01/08	
AC09	Category Code 9	O	User defined reporting code.	F0005 01/09	
AC10	Category Code 10	O	User defined reporting code.	F0005 01/10	
AC11	Category Code 11	O	User defined reporting code.	F0005 01/11	

Field	Description	RCO	Explanation	Value	Default
AC12	Category Code 12	O	User defined reporting code.	F0005 01 / 12	
AC13	Category Code 13	O	User defined reporting code.	F0005 01 / 13	
AC14	Category Code 14	O	User defined reporting code.	F0005 01 / 14	
AC15	Category Code 15	O	User defined reporting code.	F0005 01 / 15	
AC16	Category Code 16	O	User defined reporting code.	F0005 01 / 16	
AC17	Category Code 17	O	User defined reporting code.	F0005 01 / 17	
AC18	Category Code 18	O	User defined reporting code.	F0005 01 / 18	
AC19	Category Code 19	O	User defined reporting code.	F0005 01 / 19	
AC20	Category Code 20	O	User defined reporting code.	F0005 01 / 20	
AC21	Category Code 21	O	User defined reporting code.	F0005 01 / 21	
AC22	Category Code 22	O	User defined reporting code.	F0005 01 / 22	
AC23	Category Code 23	O	User defined reporting code.	F0005 01 / 23	
AC24	Category Code 24	O	User defined reporting code.	F0005 01 / 24	
AC25	Category Code 25	O	User defined reporting code.	F0005 01 / 25	
AC26	Category Code 26	O	User defined reporting code.	F0005 01 / 26	
AC27	Category Code 27	O	User defined reporting code.	F0005 01 / 27	
AC28	Category Code 28	O	User defined reporting code.	F0005 01 / 28	
AC29	Category Code 29	O	User defined reporting code.	F0005 01 / 29	

Field	Description	R C O	Explanation	Value	Default
AC30	Category Code 30	O	User defined reporting code.	F0005 01/30	
ATE	User Code 3	O		DD	DD
ATR	Receivable Y/N	O		DD	DD
ATP	Payables Y/N/M	O		DD	DD
ATO	Owner Y/N	O		DD	DD
ATPR	User Code 4	O		DD	DD
ADD1	Address Line 1	O		DD	
ADD2	Address Line 2	O		DD	
ADD3	Address Line 3	O		DD	
ADD4	Address Line 4	O		DD	
ADDZ	Postal Code	O		DD	DD
ADDS	State	O		F0005 00/S	DD
CTY1	City	O		DD	
COUN	County	O		DD	
CTR	Country	O		F0005 00/CN F0070	DD
PA8	Parent Number	O		F0150	AN8
AN81	Address Number 1	O		F0101	AN8
AN82	Address Number 2	O		F0101	AN8
AN83	Address Number 3	O		F0101	AN8
AN84	Address Number 4	O		F0101	AN8
AN85	Factor/Special Payee	O		F0101	AN8
AN86	Address Number 5	O		F0101	AN8
APC	A/P Class	O		DD	DD

Field	Description	R C O	Explanation	Value	Default
HDPY	Hold Payment	O		DD	DD
SCK	Multiple Checks	O		DD	DD
FLD	Float Days - Checks	O			
ARC	A/R Class	O		DD	DD
STMTS	Print Statement	O		DD	DD
STTO	Send Statement To	O		DD	DD
ABC1	ABC Code Sales	O		DD	DD
ABC2	ABC Code Margin	O		DD	DD
ABC3	ABC Code Average Days	O		DD	DD
TRAP	Payment Terms - A/P	O		F0014	
TRAR	Payment Terms - A/R	O		F0014	
AFC	Apply Finance Charges	O		DD	DD
FD	Apply Finance Charges Days	O		DD	DD
FP	Percentage Factor	O			
BO	Balance Forward - Open	O		DD	DD
CM	Flash Message	O		F0005 00/CM	DD
DLC	Date Last Credit Review	O		Valid date	Format: Julian
SIC	S.I.C. Code	O		F0005 01/SC	
AIDP	Subsidiary - A/P Default	O		DD	DD
AIDR	Subsidiary - A/R Default	O		DD	DD
OBAP	Object Account - A/P Default	O		DD	DD

Field	Description	R C O	Explanation	Value	Default
OBAR	Object Account - A/R Default	O		DD	DD
LNGP	Language Preference	O		F0005 01/LP	DD
DNLT	Delinquency Notice	O		DD	DD
ATCS	Automatic Receipts	O		DD	DD
SITO	Send Invoice To	O		DD	DD
SQNL	Ledger Inquiry Sequence	O		DD	DD
ALGM	Automatic Receipts Algorithm	O		F0005 01/AA	DD
HDAR	Hold Invoices	O		DD	DD
CYCN	Statement Cycle	O			First Character of ALPH
TSTA	Credit Alert	O		F0005 00/CM	DD
AB1	Pre-note Code	O		DD	DD
PYIN	Payment Instrument	O		F0005 00/PY	DD
CMGR	Credit Manager	O		DD	DD
CLMG	Collection Manager	O		DD	DD
NBRR	Number of Reminders Sent	O		DD	DD
COLL	Collection Report	O		DD	DD
RYIN	Payment Instrument	O		F0005 00/PY	DD
SNTO	Sent To Address	O		F0101	
TAWH	Tax Authority	O		F0101	
PCWH	Percent Withholding	O			

Field	Description	R C O	Explanation	Value	Default
SBLI	Subledger Inactive Code	O		DD	DD
ALP1	Secondary Alpha Name	O			
ARPY	Alternate Payor	O		F0101	AN8
TXCT	Cert Tax Exemption	O			
ALKY	Alternate Key	O		F0101	
PHTP	Phone Type	O			DD
CRTE	Carrier Route	O			DD
BKML	Bulk Mail	O			DD

Table 4 - Ignored Fields

If you enter data into these fields, the functional server does not pass it to the JD Edwards World fields. The Address Book Batch Processing program (P01110Z) supplies blank, zero, or the default shown in the table below.

Field	Description	Value	Default
IDLN	Line ID in Who’s Who		
RCK7	Line Number		
DSS5	Display Sequence		
IDLN	Line ID		
EFTB	Effective Date		
DC	Description - Compressed		
AT2	AR/AP Netting		
AT3	Address Type 3		
AT4	Address Type 4		
AT5	Address Type 5		
CFCE	Crt Fin Chg Entry		
CKHC	Credit Check Handling		

Field	Description	Value	Default
RVNT	Revenue Netted		
MNSC	Min Check Code		
FOTC	Foreign Owner		
WPTC	WPT Ind / Non		
GLBA	G / L Bank Code		
RMK	Remark		
PTI	Time Scheduled In		
PDI	Date Scheduled In		
DAOJ	Date Account Opened		
POPN	Person Opening Account		
DSO	Days Sales Outstanding		
AB2	Miscellaneous Code 2		
AB3	Miscellaneous Code 3		
UPMT	Time Last Updated		System
USER	User ID		System
PID	Program ID		System
UPML	Date Updated		System
JOBN	Work Station ID		System

Index

Miscellaneous

1099 processing, 2-27

A

A/B Supplemental Data Security form, 7-14
ABLOG data queue, 9-10
About
  address book maintenance, 2-1
  address book reports, 4-1
  address book system setup, 5-1
  electronic mail, 10-1
About address batch processing, 8-1
About address book reports, 4-1
About address book supplemental data, 7-1
About parent/child relationships, 6-1
About updates and purges, 9-1
Accessing mailboxes, 10-4
Accessing received messages, 10-15
Activating
  check digits for next numbers, 5-34
  effective dates, 5-4
Adding addresses to batches, 8-8
Additional address book information
  entering, 2-17
Additional Address Book Notes form, 2-25
Additional information
  address book, 2-17
Address book
  features, 1-3
  maintaining, 2-1
  menu overview, 1-11
  multi-national functionality, 1-4
  overview, 1-1
  reports, 4-1
  setup, *See* Setup
  system integration, 1-1
  system setup, 5-1
  tables and descriptions, 1-5
  tables, relationships between, 1-5
  user reserved fields, 3-1, 3-17
Address Book
  email/URL, 3-21
Address Book Additional Information form, 2-17
Address Book Batch Update report, 8-13
Address book constants
  setting up, 5-3
Address Book Constants form, 5-4
Address book records
  assigning category codes, 2-26
  entering, 2-9
  entering additional information, 2-17
  entering basic information, 2-10
  entering effective dates, 2-15
  entering phone numbers, 2-20
  locating, 2-5
Address Book Revisions form, 2-10
Address formats
  by country, 5-7, 5-37
Address revisions, 3-3
  effective date, 3-6
Addresses, *See* Batch addresses
  uploading from outside source, 8-1
Assigning
  category codes, 2-26
Assigning E-mail user defined codes, 10-33
Audit logs
  purging, 9-16

B

Bad address flag, 3-6
Basic address book information
  entering, 2-10
Batch Address Review form, 8-4
Batch Address Revisions form, 8-8
Batch addresses
  adding, 8-8
  overview, 8-1
  processing, 8-13
  purging processed, 8-15
  reviewing, 8-4
  reviewing transaction detail, 8-4
  revising, 8-10
  revisions overview, 8-7
Batch File Entry Exceptions report, 8-13
Bulletin Board Subscription form, 10-29
Bulletin boards
  electronic mail, 10-29

C

Calendar Inquiry form, 10-5
Calendars
  electronic mail, 10-5

Category codes
  additional for address book, 2-26
  address book, 5-21
  assigning, 2-26
  country codes, 5-23
  Dun & Bradstreet ratings, 5-25
  electronic mail message types, 5-24
  flash messages, 5-23
  language preference, 5-24
  salutation codes, 5-23
  search types, 5-22
  setting up, 5-31
  standard industry classifications (SIC), 5-22
  TRW ratings, 5-25
  updating, 9-5
  user reserved fields, 3-17
  who's who, 5-22
  word search stop words, 5-24
Category Codes form, 2-26
Category Codes Updates report, 4-16
Changing a message sequence, 10-26
Changing code and narrative data types, 7-22
Changing data types, 7-21
Changing program data types, 7-23
Check digits
  activating for next numbers, 5-34
Check for Duplicates report, 4-11
Cheshire labels, 4-18
CIF (Central Information File)
  supplemental data, 7-1
CIF Sequence Revisions form, 7-12
CIF sequences
  defining, 7-11
Copying detailed supplemental information, 7-17
Copying narrative text, 7-19
Country codes, 5-23
Country constants
  setup, 5-7, 5-37
Country Constants Revisions form, 5-11
Creating a worktable, 7-29
Creating parent/child relationships, 6-3
Creating the address book reporting table, 4-21
Creating the search word table, 9-9
Credit Message Reference form, 9-4
Credit messages
  double-byte, 9-4
  updating, 9-3
Custom reports, 4-21

D

Data
  supplemental, 7-1
Data by Address Book report, 7-32
Data by Data Type report, 7-30
Data Entry form, 7-16
Data types
  changing, 7-21
  changing code and narrative types, 7-22
  changing program types, 7-23
  deleting, 7-11
Define Your Own Data Types form, 7-6, 7-22
Defining CIF sequences, 7-11
Defining supplemental data, 7-5
Defining supplemental data security, 7-13
Defining the format of address book numbers, 5-4
Deleting
  address book information, 2-9
  address book records, 4-11
  names from distribution lists, 10-15
  parent/child relationships, 6-6
  processed address batches, 8-15
Distribution lists, 6-6
  deleting names, 10-15
  electronic mail, 10-12, 10-14
  locating, 10-15
  permanent, 10-14
  security, 10-14
  temporary, 10-14
Diversity codes
  socio-economic information, 3-9
Document numbering, 5-33
Double-byte
  credit messages, 9-4
Dun & Bradstreet
  labels, 4-19
Dun & Bradstreet rating codes, 5-25
Duplicate entry checking
  address revisions, 3-4

E

Effective date
  address revisions, 3-6
Effective dates
  activating, 5-4
  entering, 2-15
  updating, 9-7
Electronic mail
  accessing mailboxes, 10-4
  assigning user defined codes, 10-33
  bulletin boards, 10-29
  changing message sequence, 10-26
  distribution list security, 10-14
  distribution lists, 10-12, 10-14
  entering remarks, 10-5
  features, 1-8
  forwarding messages, 10-17
  mail box caegory, 10-21
  menu overview, 1-11
  printing messages, 10-16
  returning messages, 10-19
  revising calendars, 10-6
  revising sent messages, 10-11

  routing future mail, 10-20
  security, 5-5
  sending messages, 10-10
  signing in and out, 10-4
  system integration, 1-7
  tables and descriptions, 1-9
  user defined codes, 10-21
  viewing messages, 10-15
  viewing messages with same status, 10-25
  viewing time logs, 10-6
Electronic mail message type codes, 5-24
Email / URL
  revisions, 3-1, 3-21
Email / URL selection
  using, 3-21
Entering
  additional address book information, 2-17
  address book records, 2-9
  address revisions, 3-4
  basic address book information, 2-10
  notes for address book records, 2-25
  phone numbers, 2-20
  remarks for electronic mail, 10-5
  who's who information, 2-22
Entering and copying supplemental data, 7-15
Entering detailed supplemental information, 7-16
Entering narrative text, 7-18

F

Features
  address book, 1-3
  electronic mail, 1-8
Flash message codes, 5-23
Flash messages, 9-3
Format
  address book number, 5-4
Forms
  A / B Supplemental Data Security, 7-14
  Additional Address Book Notes, 2-25
  Address Book Additional Information, 2-17
  Address Book Constants, 5-4
  Address Book Revisions, 2-9
  Batch Address Review, 8-4
  Batch Address Revisions, 8-8
  Bulletin Board Subscription, 10-29
  Calendar Inquiry, 10-5
  Category Codes, 2-26
  CIF Sequence Revisions, 7-12
  Country Constants Revisions, 5-11
  Credit Message Reference, 9-4
  Data Entry, 7-16
  Define Your Own Data Types, 7-6, 7-22
  Inquiry by Address, 7-25
  Inquiry by Data Type, 7-26
  Mail Box Selection, 10-4
  Message Center, 10-10
  Message Summary, 10-16
  Message View / Entry, 10-33
  Name Search, 2-6
  Next Numbers, 5-34
  Phone Numbers, 2-20
  Postal Code Revisions, 5-16
  Structure Inquiry, 6-7
  Structure Revisions, 6-3
  Supplemental Data - Narrative, 7-18
  Translate User Defined Codes, 5-28
  Who's Who, 2-22
  Work With User Defined Codes, 5-27
Forwarding messages, 10-17

I

Inquiry by Address form, 7-25
Inquiry by Data Type form, 7-26

L

Labels
  by address, 4-18
  by who's who, 4-18
  Cheshire, 4-18
  Dun & Bradstreet, 4-19
  printing, 4-17
Language preference codes, 5-24
Locating
  address book records, 2-5

M

Mail Box Selection form, 10-4
Mail filter
  electronic mail, 10-20
Mailboxes
  accessing, 10-4
Mailing formats, 5-8
Mailing labels, *See* Labels
Menu overview, 1-11
Message Center form, 10-10
Message log
  purging, 9-16
Message Summary form, 10-16
Message View / Entry form, 10-33
Messages
  credit, 9-3
  forwarding electronic mail, 10-17
  printing electronic mail, 10-16
  returning electronic mail, 10-19
  revising electronic mail, 10-11
  routing future electronic mail, 10-20
  sending messages, 10-10
  viewing electronic mail, 10-15
Multiple addresses, 3-3
  entering, 3-4

N

Name Search form, 2-6
Names
  searching for, 2-6
Next numbers, 5-33
  activating check digits, 5-34
  changing, 5-34
  changing the sequence, 5-34
  setting up, 5-33
Next Numbers form, 5-34
Notes
  entering for address book, 2-25

O

Organizational structures
  parent/child, 6-1
Overview
  address book, 1-1

P

Page breaks, 4-12
Parent/child
  creating relationships, 6-3
  overview, 6-1
  printing relationships, 6-8
  viewing relationships, 6-6
Phone numbers
  entering, 2-20
  multiple, 2-22
Phone Numbers form, 2-20
Postal Code Revisions form, 5-16
Postal codes
  setup, 5-15
Printing address and who's who labels, 4-18
Printing Cheshire labels, 4-2, 4-18
Printing Dun & Bradstreet labels, 4-2, 4-19
Printing parent/child relationships, 6-8
Printing reports by address and who's who, 4-3
Printing supplemental data reports, 7-30
Printing the check for duplicates report, 4-11
Processing address batches, 8-13
Program ID
  P0001Z (batch address review), 8-4
  P0002, 5-34
  P00051, 5-27
  P0005D, 5-28
  P0016 (additional address book notes), 2-25
  P0070 (country constants revisions), 5-11
  P0081 (A/B supplemental data security), 7-14
  P00PURGE (processed batch address purge), 8-15
  P01018 (email/URL revisions), 3-1, 3-21
  P01018S (email/URL selection), 3-21
  P0101Z1 (batch address revisions), 8-8
  P010512 (category codes), 2-26
  P010513 (address book additional information), 2-17
  P01075 (phone numbers), 2-20
  P01090 (define your own data types), 7-6, 7-22
  P01091 (data entry), 7-16
  P01093 (supplemental data - narrative), 7-18
  P01094 (CIF sequence revisions), 7-12
  P011011 (message view/entry), 10-33
  P0111OZ (batch address processing), 8-13
  P01134 (bulletin board subscription), 10-29
  P0116 (address revisions), 3-3
  P0117 (postal code revisions), 5-16
  P01200 (name search), 2-6
  P01201 (credit message reference), 9-4
  P01210 (inquiry by data type), 7-26
  P01220 (inquiry by address), 7-25
  P01240 (message summary), 10-16
  P01250W (mail box selection), 10-4
  P01252 (calendar inquiry), 10-5
  P01270 (structure inquiry), 6-7
  P01425 (parent/child structure), 6-8
  P01440 (data by data type), 7-30
  P01450 (data by address book), 7-32
  P01490 (global update category codes), 9-5
  P0150 (structure revisions), 6-3
  P0155 (address book usr reserved fields), 3-1, 3-17
  P01801 (purge audit log), 9-16
  P01812 (purge time log), 9-16
  P01813 (purge message log), 9-16
  P01820 (refresh search word table), 9-10
  P01840 (effective address update), 9-7
  P01BDWRD (build search word table), 9-10
Program IDs
  (P01017) related addresses, 3-13
Purging, 9-13
  address book information, 9-14
  audit logs, 9-16
  message log, 9-16
  processed batch addresses, 8-15
  time log, 9-16
Purging address batches, 8-15
Purging address book information, 9-14
Purging records, 9-13

Q

Query search, 2-7
  creating, 9-10
  updating, 9-9, 9-10

R

Related addresses
  errors, 3-14
  program P01017, 3-13

- retrieving, 3-13
- user defined codes, 3-13

Reports
- Address - One Line per Address, 4-4
- Address - with Codes and Notes, 4-4
- Address - without Codes and Notes, 4-6
- Address Book Batch Update, 8-13
- Batch File Entry Exceptions, 8-13
- Category Codes Updates, 4-16
- Check for Duplicates, 4-11
- custom, 4-21
- Data by Address Book, 7-32
- Data by Data Type, 7-30
- overview, 4-1
- page breaks, 4-12
- supplemental data, 7-29
- Who's Who - One Line per Address, 4-7
- Who's Who - with Codes and Notes, 4-9
- Who's Who - without Codes and Notes, 4-9

Retrieving related addresses, 3-13
Returning messages, 10-19
Reviewing address batches, 8-3
Reviewing addresses, 8-4
Reviewing transaction detail, 8-5
Revising sent messages, 10-11
Routing future mail, 10-20

S

Salutation codes, 5-23
Search types
- category codes, 5-22

Search word table
- creating, 9-9, 9-10
- updating, 9-9, 9-10

Searches
- by alpha name, 2-6
- by query, 2-7

Searching for addresses by alpha name, 2-6
Searching for addresses by query search, 2-7
Security
- electronic mail distribution lists, 10-14
- supplemental data, 7-13

Sequence
- electronic mail messages, 10-26

Setting up
- address book constants, 5-3
- category codes, 5-31
- electronic mail security, 5-5
- next numbers, 5-33
- user defined codes, 5-27

Setting up country constants, 5-7
Setting up postal codes, 5-15
Setting up user defined codes, 5-27
Setup
- country constants, 5-7, 5-37
- postal codes, 5-15

Signing in and out, 10-4
Socio-economic factors
- address book, 3-9
- federal categories, 3-9

Socio-economic information
- diversity codes, 3-9

Standard industry classification (SIC) codes, 5-22
Structure Inquiry form, 6-7
Structure Revisions form, 6-3
Supplemental data
- changing data types, 7-21
- copying detailed information, 7-17
- copying narrative text, 7-19
- creating a report worktable, 7-29
- defining, 7-5
- defining data types, 7-5
- defining security, 7-13
- entering and copying, 7-15
- entering detailed information, 7-16
- entering narrative text, 7-18
- overview, 7-1
- printing reports, 7-30
- reports, 7-29
- viewing, 7-25
- viewing by address, 7-25
- viewing by data type, 7-26

Supplemental Data - Narrative form, 7-18
System integration
- address book, 1-1
- electronic mail, 1-7

System setup, *See* Setup

T

Tax ID code, 2-20
Tax processing, 2-27
Time log
- purging, 9-16

Time logs
- electronic mail, 10-6

Translate User Defined Codes form, 5-28
TRW rating codes, 5-25

U

Updating category codes, 9-5
Updating credit messages, 9-3
Updating effective dates, 9-7
Updating the search word table, 9-9
Upload
- addresses from outside source, 8-1

User defined code lists
- code type functions, 2-8, 3-7, 3-19, 8-14

user defined codes
- electronic mail, 10-21

User defined codes
- assigning for electronic mail, 10-33

  for address book, 3-20, 5-21
  overview, 5-19
  setting up, 5-27
  setting up blank codes, 5-28
User reserved fields
  address book, 3-1, 3-17
  category codes, 3-17
  setup, 3-17
  type code, 3-17

V

Verifying 1099 and W2 tax form information, 2-27
Viewing
  messages with the same status, 10-25
  time logs, 10-6
Viewing and revising a calendar, 10-6
Viewing data by address, 7-25
Viewing data by data type, 7-26
Viewing parent/child relationships, 6-6
Viewing supplemental data, 7-25

W

W2 processing, 2-27
Who's who
  category codes, 5-22
Who's Who form, 2-22
Who's who information
  entering, 2-22
Word search stop word codes, 5-24
Work With User Defined Codes form, 5-27
Working with address batches, 8-7
Working with bulletin boards, 10-29
Working with employee mail boxes, 10-3
Working with mail distribution lists, 10-12, 10-14
Working with message features, 10-25
Working with parent/child relationships, 6-3
Working with supplemental data reports, 7-29

Z

Zip code revisions, 5-15