October 2015
Describes the JD Edwards EnterpriseOne In-Memory Sales Advisor module, and discusses how to set up and use the module to work with dynamic product suggestions, order profit display, and supply monitor.
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Welcome to the JD Edwards EnterpriseOne Applications In-Memory Sales Advisor Implementation Guide.

Audience
This guide is intended for implementers and end users of the JD Edwards EnterpriseOne In-Memory Sales Advisor solution.

JD Edwards EnterpriseOne Products
This implementation guide refers to these JD Edwards EnterpriseOne products from Oracle:
- JD Edwards EnterpriseOne Address Book.
- JD Edwards EnterpriseOne Advanced Pricing.
- JD Edwards EnterpriseOne Fulfillment Management.
- JD Edwards EnterpriseOne Inventory Management.
- JD Edwards EnterpriseOne Sales Order Management.

JD Edwards EnterpriseOne Application Fundamentals
Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide.

Customers must conform to the supported platforms for the release as detailed in the JD Edwards EnterpriseOne minimum technical requirements. See document 745831.1 (JD Edwards EnterpriseOne Minimum Technical Requirements Reference) on My Oracle Support:

https://support.oracle.com/epmos/faces/DocumentDisplay?id=745831.1

In addition, JD Edwards EnterpriseOne may integrate, interface, or work with other Oracle products. Refer to the cross-reference material in the Program Documentation at http://oracle.com/contracts/index.html for Program prerequisites and version cross-reference documents to assure compatibility of various Oracle products.
Documentation Accessibility

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

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Related Information

For additional information about JD Edwards EnterpriseOne applications, features, content, and training, visit the JD Edwards EnterpriseOne pages on the JD Edwards Resource Library located at:

http://learnjde.com

Conventions

The following text conventions are used in this document:

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Boldface</td>
<td>Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.</td>
</tr>
<tr>
<td>Italic</td>
<td>Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.</td>
</tr>
<tr>
<td>Monospace</td>
<td>Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.</td>
</tr>
</tbody>
</table>
Introduction to JD Edwards EnterpriseOne In-Memory Sales Advisor

This chapter contains the following topics:

- Section 1.1, "JD Edwards EnterpriseOne In-Memory Sales Advisor Overview"
- Section 1.2, "JD Edwards EnterpriseOne In-Memory Sales Advisor Business Processes"
- Section 1.3, "JD Edwards EnterpriseOne In-Memory Sales Advisor Integrations"
- Section 1.4, "JD Edwards EnterpriseOne In-Memory Sales Advisor Implementation"

1.1 JD Edwards EnterpriseOne In-Memory Sales Advisor Overview

Oracle's JD Edwards EnterpriseOne In-Memory Sales Advisor solution in the JD Edwards EnterpriseOne Supply Chain Management (SCM) suite from Oracle leverages functionality from Oracle's JD Edwards EnterpriseOne Order Management, Oracle's JD Edwards EnterpriseOne Advanced Pricing, Oracle’s JD Edwards EnterpriseOne Inventory Management, and Oracle’s JD Edwards EnterpriseOne Fulfillment Management systems with real-time functionality that is optimized for the Oracle Technology stack.

JD Edwards EnterpriseOne In-Memory Sales Advisor provides unprecedented speed to gather, aggregate, and summarize real-time customer, product, and sales information. JD Edwards EnterpriseOne In-Memory Sales Advisor brings visibility to revenue opportunities during order capture to drive sales, and insight into future revenue and profitability to enable proactive decision making for changing sales conditions.

The ability to access customer history, product bundles, and volume discounts in real time enables customer service representatives (CSRs) to be more efficient and speed up the order capture process. CSRs can recommend quantities and related products, ensure profitability of orders, and communicate product availability during order entry, which drives the perfect order and provides a great customer experience.

With the JD Edwards EnterpriseOne In-Memory Sales Advisor solution, you can:

- Increase top-line revenue with dynamic real-time up-sell recommendations, which focus on a higher quantity level to provide the customer with better pricing.
- Provide up-sell opportunities using quantity increases to receive line level quantity discounts.
- Provide up-sell opportunities using quantity, weight, and amount increases to receive discounts based on a group of items.
- Build cross sell and frequently purchased product opportunities based on the real-time processing of millions of previous and current sales order records.
- Monitor item, order, and customer profit margins to ensure margins are met during order capture.
- Improve revenue and profit insight to drive executive decision making for product pricing and reducing risk of incorrect pricing.
- Generate higher customer satisfaction levels by ensuring fulfillment of priority orders and improving responsiveness to customer inquiries.

1.2 JD Edwards EnterpriseOne In-Memory Sales Advisor Business Processes

The following process flow illustrates the JD Edwards EnterpriseOne In-Memory Sales Advisor business processes:

Figure 1–1 Sales Advisor Process Flow

The standard sales order management process includes five basic steps:
1. Enter sales orders.
2. Print pick slips.
3. Confirm shipments.
4. Print invoices.
5. Update and post sales.

During sales order entry, you can use the JD Edwards EnterpriseOne In-Memory Sales Advisor functionality to locate and display line up-sell opportunities, preferred items, cross sell items, frequency items, and order up-sell opportunities, to generate order profit displays, display fulfillment potential; and display supply and demand potential.

After you save the sales order, the system enters the order into the JD Edwards EnterpriseOne Fulfillment Management system if you have set up this functionality.

We discuss the In-Memory Sales Advisor business processes in the associated business process chapters in this implementation guide.

1.3 JD Edwards EnterpriseOne In-Memory Sales Advisor Integrations

JD Edwards EnterpriseOne In-Memory Sales Advisor is an integrated solution that supports JD Edwards EnterpriseOne base functionality. The solution is integrated to support any company that has a call center and needs visibility to sales opportunities, such as distribution, manufacturing, wholesale, and consumer goods.

JD Edwards EnterpriseOne In-Memory Sales Advisor integrates with these JD Edwards EnterpriseOne products from Oracle:
The system leverages information from these modules to compile, summarize, and display data to enable faster decision-making.

We discuss integration considerations in the implementation chapters in this implementation guide.

1.3.1 JD Edwards EnterpriseOne Address Book

The JD Edwards EnterpriseOne Address Book system from Oracle stores current information about customers, such as address, contact information, phone and fax numbers, billing instructions, and default shipping and invoicing information.

The JD Edwards EnterpriseOne Address Book system integrates with JD Edwards EnterpriseOne In-Memory Sales Advisor to provide current information about customers.

1.3.2 JD Edwards EnterpriseOne Advanced Pricing

The JD Edwards EnterpriseOne Advanced Pricing system from Oracle enables you to group customers and items so you can accommodate different market sectors and product lines; you do not have to define adjustments for each item or customer. You can define price groups by customers, items, customer groups, or item groups. You also can identify customers by Sold To, Ship To, or Parent addresses.

The JD Edwards EnterpriseOne Advanced Pricing system integrates with JD Edwards EnterpriseOne In-Memory Sales Advisor to provide line up-sell opportunity breaks with their respective prices and to evaluate quantity, weight, and amount adjustments for order and basket up-sell opportunities.

1.3.3 JD Edwards EnterpriseOne Fulfillment Management

The JD Edwards EnterpriseOne Fulfillment Management system from Oracle addresses situations in which enterprises have demand greater than supply. The purpose of the JD Edwards EnterpriseOne Fulfillment Management system is to fulfill orders in accordance with criteria from the sales order, customer, and service level rules agreed upon between you and your customers. The JD Edwards EnterpriseOne Fulfillment Management system significantly reduces or eliminates backorders that occur because of inventory availability issues.

The JD Edwards EnterpriseOne Fulfillment Management system integrates with JD Edwards EnterpriseOne In-Memory Sales Advisor to support inventory allocation of product to the customer.

1.3.4 JD Edwards EnterpriseOne Inventory Management

The JD Edwards EnterpriseOne Inventory Management system from Oracle stores item information for the JD Edwards EnterpriseOne Sales Order Management system, JD Edwards EnterpriseOne Procurement system, and JD Edwards EnterpriseOne Manufacturing and Supply Chain Management systems from Oracle. JD Edwards EnterpriseOne Inventory Management also stores sales and purchasing costs and quantities available by location and tracks holds for locations from which items should not be sold. Any change in inventory valuation, count variances, or movement updates the general ledger.

The JD Edwards EnterpriseOne Inventory Management system integrates with JD Edwards EnterpriseOne In-Memory Sales Advisor to define and manage items for sales order entry.
1.3.5 JD Edwards EnterpriseOne Sales Order Management

The JD Edwards EnterpriseOne Sales Order Management system from Oracle controls all aspects of processing sales orders. The system enables sales order entry, shipment confirmation, and sales update.

The JD Edwards EnterpriseOne Sales Order Management system integrates with JD Edwards EnterpriseOne In-Memory Sales Advisor to support dynamic product suggestions and order profit display in relation to specific orders at sales order entry.

The JD Edwards EnterpriseOne Sales Order Management system integrates with JD Edwards EnterpriseOne In-Memory Sales Advisor to monitor supply and demand in real time and dynamically analyze and evaluate historical sales information to forecast demand, increase revenue, monitor profit margins, and enhance overall customer satisfaction.

1.4 JD Edwards EnterpriseOne In-Memory Sales Advisor Implementation

This section provides an overview of the steps that are required to implement the JD Edwards EnterpriseOne In-Memory Sales Advisor solution.

In the planning phase of your implementation, take advantage of all Oracle sources of information, including the installation guides and troubleshooting information.

When determining which electronic software updates (ESUs) to install for the JD Edwards EnterpriseOne In-Memory Sales Advisor solution, use the EnterpriseOne and World Change Assistant. EnterpriseOne and World Change Assistant, a Java-based tool, reduces the time required to search and download ESUs by 75 percent or more and enables you to install multiple ESUs simultaneously.

See *JD Edwards EnterpriseOne Tools Software Updates Guide*.

1.4.1 Global Implementation Steps

This list outlines the suggested global implementation steps for the JD Edwards EnterpriseOne In-Memory Sales Advisor solution:

- Set up global user-defined code (UDC) tables.
  
  See "Working with User Defined Codes in the *JD Edwards EnterpriseOne Tools Runtime Administration Guide*.
- Set up fiscal date patterns.
  
  See "Setting Up Fiscal Date Patterns" in the *JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide*.
- Set up companies.
  
- Set up business units.
  
- Set up next numbers.
  
- Set up accounts and the chart of accounts.

- Set up General Accounting constants.

- Set up multicurrency processing, including currency codes and exchange rates.
  See "Preface" in the *JD Edwards EnterpriseOne Applications Multicurrency Processing Implementation Guide*.

- Set up ledger type rules.
  See "Setting Up Ledger Type Rules for General Accounting" in the *JD Edwards EnterpriseOne Applications General Accounting Implementation Guide*.

- Set up address book records.
  See "Entering Address Book Records" in the *JD Edwards EnterpriseOne Applications Address Book Implementation Guide*.

- Set up default location and printers.

- Set up branch/plant constants.
  See "Defining Branch/Plant Constants" in the *JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide*.

- Set up Manufacturing/Distribution automatic accounting instructions (AAIs).
  See "Setting Up AAIs in Distribution Systems" in the *JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide*.

- Set up document types.
  See "Setting Up Document Type Information" in the *JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide*.

- Set up item records.
  See "Entering Item Information" in the *JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide*.

### 1.4.2 In-Memory Sales Advisor Implementation Steps

This list outlines the suggested application-specific implementation steps for the JD Edwards EnterpriseOne In-Memory Sales Advisor solution:

- Set up constants for the JD Edwards EnterpriseOne In-Memory Sales Advisor solution.
  See *Setting Up Sales Advisor Constants*.

- Set up sales advisor included document types.
  See *Setting Up Sales Advisor Included Document Types*.
2

Understanding JD Edwards EnterpriseOne In-Memory Sales Advisor

This chapter contains the following topics:

■ Section 2.1, "The JD Edwards EnterpriseOne In-Memory Sales Advisor Solution Overview"
■ Section 2.2, "Limitations of JD Edwards EnterpriseOne In-Memory Sales Advisor"

2.1 The JD Edwards EnterpriseOne In-Memory Sales Advisor Solution Overview

The JD Edwards EnterpriseOne In-Memory Sales Advisor solution supports items in any industry that needs visibility to sales opportunities. The JD Edwards EnterpriseOne In-Memory Sales Advisor solution integrates with other JD Edwards EnterpriseOne systems from Oracle to create a complete supply chain solution.

The JD Edwards EnterpriseOne In-Memory Sales Advisor solution for Oracle Engineered Systems combines the hardware of Oracle with the application layers of JD Edwards EnterpriseOne, providing unprecedented speed to gather, aggregate, and summarize real-time customer, product, and sales information.

Oracle Engineered Systems are the building blocks of integrated compute, storage, and network components designed to provide an out-of-the-box platform for a broad range of enterprise application workloads such as JD Edwards EnterpriseOne. When you run the JD Edwards EnterpriseOne In-Memory Sales Advisor solution on Oracle Engineered Systems, you acquire quick access to information when entering sales orders. Running the JD Edwards EnterpriseOne In-Memory Sales Advisor solution on Oracle Engineered Systems enables extremely fast in-memory processing of your data.

In-memory processing means that your system can store huge amounts of data in the random access memory (RAM) of the Oracle Engineered Systems instead of in a standard database. The in-memory storage of data as you run your processes enables fast processing and fast return of process results so that you can immediately view the impact to sales orders. Because you store data in memory, access to the data is much faster than table fetches to a standard table each time that you work with sales orders.

The JD Edwards EnterpriseOne In-Memory Sales Advisor solution enables faster decision making based on summarized large volumes of data within JD Edwards EnterpriseOne.
### 2.1.1 Benefits

The JD Edwards EnterpriseOne In-Memory Sales Advisor solution drives operational improvements that help you manage sales opportunities, improve customer service, and increase profits.

The following table categorizes the benefits of using the JD Edwards EnterpriseOne In-Memory Sales Advisor solution by feature:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Benefit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dynamic Product Suggestions</td>
<td>■ Reduce setup and maintenance by taking advantage of existing functionality and dynamically evaluating large volumes of current and historical sales order records.</td>
</tr>
<tr>
<td></td>
<td>■ Generate higher customer satisfaction by making recommendations based on the context of the current order, quickly reference previous orders, and address needs while on the phone with the customer.</td>
</tr>
<tr>
<td></td>
<td>■ Increase top line revenue by recommending cross sell item, up-sell item, and order level opportunities, which enables you to sell larger quantities, sell additional items, and provide the best available prices and discounts to your customer.</td>
</tr>
<tr>
<td></td>
<td>■ Drive revenue by offering additional incentives for the customer to increase their order quantity through visibility of free goods associated with the higher purchase quantity.</td>
</tr>
<tr>
<td>Order Profit Display</td>
<td>■ Drive revenue by monitoring order and customer profit margins.</td>
</tr>
<tr>
<td></td>
<td>■ Ensure profit margins by leveraging the existing profit margin information for each product on the sales order and visually displaying the data in the current order chart during order capture.</td>
</tr>
<tr>
<td></td>
<td>■ Ensure profitability by retrieving and displaying data in the profit history chart, which shows how the current order compares to the customer’s previous orders.</td>
</tr>
<tr>
<td>Supply Monitor</td>
<td>■ Provide real-time monitoring for supply and demand.</td>
</tr>
<tr>
<td></td>
<td>■ Provide visibility to priority ranking while capturing the order, which enables proactive communication with the customer.</td>
</tr>
<tr>
<td>Profitability Simulation</td>
<td>■ Provide insight into revenue and profit drivers to improve executive decision making for product pricing and reduce the risk of incorrect pricing.</td>
</tr>
<tr>
<td></td>
<td>■ Increase visibility into the factors that drive revenue and profit and make more informed decisions on future pricing and sales.</td>
</tr>
<tr>
<td></td>
<td>■ Improve decision making by simulating changing cost and price conditions, along with forecasted demand and sales history, to immediately view the impacts.</td>
</tr>
<tr>
<td></td>
<td>■ Enable you to save the “what if” simulations to inquire upon at a later date and use as a reference for decisions that were made. You could rerun saved simulations to compare planned to actual results.</td>
</tr>
<tr>
<td></td>
<td>■ Enable you to run and analyze simulations for a variety of changing conditions quickly without the need to create batch applications or custom reports.</td>
</tr>
</tbody>
</table>
2.2 Limitations of JD Edwards EnterpriseOne In-Memory Sales Advisor

When working with the JD Edwards EnterpriseOne In-Memory Sales Advisor solution, you must use the Sales Order Entry program (P42101).
3

Setting Up JD Edwards EnterpriseOne In-Memory Sales Advisor

This chapter contains the following topics:

- Section 3.1, "Understanding the Setup Requirements for JD Edwards EnterpriseOne In-Memory Sales Advisor"
- Section 3.2, "Prerequisites"
- Section 3.3, "Activating JD Edwards EnterpriseOne In-Memory Sales Advisor"
- Section 3.4, "Setting Up Sales Advisor Constants"
- Section 3.5, "Setting Up Sales Advisor Included Document Types"

3.1 Understanding the Setup Requirements for JD Edwards EnterpriseOne In-Memory Sales Advisor

You must complete the setup tasks to define the information that the JD Edwards EnterpriseOne system uses before you use JD Edwards EnterpriseOne In-Memory Sales Advisor. You set up information in the JD Edwards EnterpriseOne Address Book, JD Edwards EnterpriseOne Advanced Pricing, JD Edwards EnterpriseOne Fulfillment Management, JD Edwards EnterpriseOne Inventory Management, and JD Edwards EnterpriseOne Sales Order Management systems.

You can use the In-Memory Sales Advisor features only if you activate the JD Edwards EnterpriseOne In-Memory Sales Advisor system in the EnterpriseOne System Control program (P99410). Additionally, before you use the Cross Sell, Frequency, Order Profit, Profit Simulator, and Supply Monitor features in JD Edwards EnterpriseOne In-Memory Sales Advisor, you must set up sales advisor constants and sales order feature document types.

3.2 Prerequisites

Before you complete the tasks in this section:

- Set up address book records in the JD Edwards EnterpriseOne Address Book system.

  See "Entering Address Book Records" in the JD Edwards EnterpriseOne Applications Address Book Implementation Guide.

- Set up item records in the JD Edwards EnterpriseOne Inventory Management system.
See "Entering Item Information" in the *JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide*.

- Set up pricing features, such as price adjustments, customer groups, item groups, price groups, and free goods, in the JD Edwards EnterpriseOne Advanced Pricing system.

  See the *JD Edwards EnterpriseOne Applications Advanced Pricing Implementation Guide*.

- Set up sales functionality to enter, process, and ship sales orders in the JD Edwards EnterpriseOne Sales Order Management system.

  See the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.

- Set the processing options for the Sales Order Entry programs (P4210 and P42101).

  You must set up a version of the P4210 program that specifies how the system processes sales orders. You then enter this version of the P4210 program in the processing options of the P42101 program. When you create and modify a sales order using the P42101 program, the system processes the sales order by using the information in the processing options of P42101, along with the information in the specified version of P4210.


  See "Setting Processing Options for the Sales Order Entry Program (P42101)" in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.

- (Optional) Set up supply and demand inclusion rules in the JD Edwards EnterpriseOne Requirements Planning system.


- (Optional) Set up the JD Edwards EnterpriseOne Fulfillment Management system.

  See *JD Edwards EnterpriseOne Applications Fulfillment Management Implementation Guide*.

**3.3 Activating JD Edwards EnterpriseOne In-Memory Sales Advisor**

This section provides an overview and discusses how to activate the JD Edwards EnterpriseOne In-Memory Sales Advisor system.

**3.3.1 Understanding the JD Edwards EnterpriseOne In-Memory Sales Advisor System Activation**

To use the In-Memory Sales Advisor features, you must activate the JD Edwards EnterpriseOne In-Memory Sales Advisor system in the EnterpriseOne System Control program (P99410). The In-Memory Sales Advisor system code is SY42XSA. To activate system SY42XSA, a record containing this data must exist in the OneWorld System Control File table (F99410):

- The Data Item field must have a value of SY42XSA.
- The Use Module field must have a value of Yes.
3.3.2 Activating JD Edwards EnterpriseOne In-Memory Sales Advisor

To activate JD Edwards EnterpriseOne In-Memory Sales Advisor:

1. Access the EnterpriseOne System Control - Revisions form.

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Form ID</th>
<th>Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>EnterpriseOne System Control – Revisions</td>
<td>W99410B</td>
<td>Enter <strong>P99410</strong> in the Fast Path field.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>On the Work With EnterpriseOne System Control form, select data item SY42XSA and click Select.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If the data item SY42XSA does not exist, click Add on the Work With EnterpriseOne System Control form.</td>
</tr>
</tbody>
</table>

2. Select the Yes option.

3. Click OK.

3.4 Setting Up Sales Advisor Constants

This section provides an overview of sales advisor constants and discusses how to set up sales advisor constants.

3.4.1 Understanding Sales Advisor Constants

Use the Sales Advisor Constants program (P42X00) to activate functionality and set up criteria for the Cross Sell, Frequency, Order Up-Sell, Order Profit, and Supply Monitor features. The constants enable you to:

- Activate Sales Advisor features.
- Specify the search criteria that the system uses to search for records.
- Specify the period over which the system searches sales orders.
- Identify order types to include in the sales order searches.
- Define a tolerance percentage to indicate order up-sell opportunities that the system can recommend.
- Specify the program version that the system uses.

The system stores sales advisor constants in the Sales Advisor Constants table (F42X00).

3.4.2 Setting Up Sales Advisor Constants

To set up sales advisor constants:

1. Access the Sales Advisor Constants form.

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Form ID</th>
<th>Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Advisor</td>
<td>W42X00A</td>
<td>Sales Advisor Setup (G42X41).</td>
</tr>
<tr>
<td>Constants</td>
<td></td>
<td>Select Sales Advisor Constants (P42X00).</td>
</tr>
</tbody>
</table>

2. On the Sales Advisor Constants form, complete these Order Advisor options in the Activate group box to activate functionality:
Cross Sell
Select the Cross Sell option to perform cross sell functionality.

Frequency
Select the Frequency option to perform the frequency functionality.

Included Document Types
Click the Included Document Types button to update the document types the system uses for the cross sell and frequency functionality.

If you do not set up included document types, then the system issues a warning message at order entry and when the Buying Frequency Load program (R42X010) is run.

See Setting Up Sales Advisor Included Document Types.

3. Select one of the following options in the Search Criteria group box if you select Cross Sell or Frequency in the Activate group box:
   - Customer Only
   - Customer Group
   - All Customers

Cross Sell/Frequency Search Type
Specifies how the system searches for cross sell and frequency items. Values are:

Customer Only: The system only suggests items ordered by the Sold To customer on the current sales order.

Customer Group: The system suggests only items ordered by customers in the same customer group on the current sales order.

The system supports both simple and complex customer groups.

If the customer group on the current sales order is blank, then the system uses the customer group from the customer billing instructions of the Sold To on the current sales order. If the customer billing instructions are also blank, then the system suggests items ordered by any customer. This search type is similar to the All Customers search type.

All Customers: The system suggests items ordered by any customer.

4. Enter a numeric value in the Months Back field in the Cross Sell Time Frame group box if you select Cross Sell in the Activate group box.

Months Back
Specifies the number of months, greater than zero in whole numbers only, used to calculate the period over which to search sales orders to suggest cross sell items.

The system uses this number to count back the specified number of months from the Order Date on the sales order.

This is a required field if you select Cross Sell in the Activate group box.

For example: The current date is August 17 of the current year and the number of months entered is 3. The system searches sales orders entered from May 17 through August 17 of the current year to find items to suggest for cross sell.

5. Complete these fields in the Frequency Time Frame group box if you select Frequency in the Activate group box:
**Months Back**
Specifies the number of months used to calculate the start of the date range used for suggesting frequency items. If you enter zero as the value, then the system uses the current month in the calculation to determine the start of the date range.

For example: The current date is August 17 of the current year. If the value in the Months Back and Months Forward fields are set to 0, then the system retrieves all counts for the month of August.

If the value in the Months Back and Months Forward fields are set to 1, then the system retrieves all counts for the months of July, August, and September.

**Months Forward**
Specifies the number of months used to calculate the end of the date range used for suggesting frequency items. If you enter zero as the value, then the system uses the current month in the calculation to determine the end of the date range.

For example: The current date is August 17 of the current year. If the values in the Months Back and Months Forward fields are set to 0, then the system retrieves all counts for the month of August.

If the values in the Months Back and Months Forward fields are set to 1, then the system retrieves all counts for the months of July, August, and September.

If you leave the Months Back and Months Forward fields set to blank, then the system determines the frequency item opportunities based on the current month only.

**Years Back**
Specifies the number of prior years to search for suggesting frequency items. If you enter zero as the value, then the system uses the current year in the calculation to determine the date range.

If you leave the Years Back field set to blank, then the system determines the frequency item opportunities based on the current year only.

The specific start and end dates (month) are determined by the values in the Frequency Months Back and Frequency Months Forward fields.

---

**Note:** You must rerun the Buying Frequency Load program (R42X010) if you change the frequency time frame values or search criteria.

The system issues a warning message if you change any value and do not rerun the R42X010 program.

---

For example, you set up frequency functionality in the system with the following values:

- Today’s date: August 17, 2013.
  The search includes the current month of August and the current year of 2013.
- Months Back: 3
  The search includes three months back from August - May, June, and July.
- Months Forward: 1
  The search includes one month forward from August - September.
- Years Back: 3
The search includes three years back from 2013 - 2010, 2011, and 2012.

The following table illustrates the search for frequency items based on the month and year criteria:

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>May</td>
<td>May</td>
<td>May</td>
<td>May</td>
<td></td>
</tr>
<tr>
<td>June</td>
<td>June</td>
<td>June</td>
<td>June</td>
<td></td>
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<tr>
<td>July</td>
<td>July</td>
<td>July</td>
<td>July</td>
<td></td>
</tr>
<tr>
<td>August</td>
<td>August</td>
<td>August</td>
<td>August</td>
<td></td>
</tr>
<tr>
<td>September</td>
<td>September</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

6. Enter a numeric value in the Tolerance (%) field in the Order Up-Sell group box if you use the Order Up-Sell feature.

_Tolerance (%) (tolerance percent)_

Specifies the opportunities and order level discounts within a range that the system recommends as potential discounts.

The system calculates and recommends discounts within and outside of the defined tolerance.

The system uses the following icons:

- Yellow inverted triangle: Level break within tolerance.
- Red square: Level break outside tolerance. The charts and grid display only one outside tolerance opportunity.

If you leave the Tolerance (%) field blank, the system uses zero as the default value. If you do not set up the Sales Advisor Constants program (P42X00), then the system uses zero as the tolerance percent value.

7. Complete these options in the Order Profit group box to use the Order Profit Display feature:

_No. of Orders to Display (number of orders to display)_

Specifies the number of sales orders to display in the Profit History chart.

If you leave this field blank or enter a value of 1, then the system uses a default value of 150 as the number of records to display in the chart.

_Days for Historical Range_

Specifies the default number of days to display in the Profit History chart. The number of days indicates the beginning of a date range for which the system displays previous sales orders.

If no value is entered in the Days for Historical Range field, then the system enters a default date in the From Date field in the Profit History group box. The default value is 90 days.

_Included Document Types_

Click the Included Document Types button to update the document types the system uses for the order profit functionality.

If you do not set up included document types, then the system issues a warning message at order entry when you select the Order Profit tab.
See Setting Up Sales Advisor Included Document Types.

8. Complete these Supply Monitor options in the Activate group box to activate functionality:

**Fulfillment Management**
Select the Fulfillment Management option to indicate that the system evaluates the fulfillment potential for sales order detail lines in Fulfillment Management.

**Supply/Demand**
Select the Supply/Demand option to indicate that the system evaluates the supply and demand for sales order detail lines.

When you activate the Supply/Demand option, the system evaluates the order lines that have an order type and line type set up in the Supply/Demand Inclusion Rules program (P34004).

Note: If you do not select the Fulfillment Management option and select the Supply/Demand option, the system uses Supply/Demand for all items (including the items that go into Fulfillment).

9. Complete these fields in the Fulfillment Management group box if you select Fulfillment Management in the Activate group box:

**Auto Fulfillment (R4277701)**
Specify the version of the Auto Fulfillment program (R4277701) that the system uses as the basis for displaying the Supply Monitor icon on sales order lines for items that the system enters into the fulfillment process. If you leave this option blank, the system uses version XJDE0001.

**Availability Tolerance**
Represents the tolerance percentage used during the fulfillment potential process. The tolerance percentage determines how much of the available inventory the system considers possibly available. The system presents the tolerance percentage as a yellow color for the icon and chart amounts in sales order entry. For example, if item availability is 100 and you set the tolerance percent to 20, the system identifies the fulfillment potential for the available last 20 as moderate (yellow).

**Sort Sequence (A/D)**
Indicates whether the system evaluates scores in descending or ascending order. If you use fulfillment potential processing during sales order entry, then this option enables you to specify the sequence in which to evaluate scores for display on the Supply Monitor - Fulfillment Potential form.

If you leave this option blank, then the system evaluates scores in descending order where a value of 2 is more important than a value of 1. If you select this option, then the system evaluates scores in ascending order where a value of 1 is more important than a value of 2.

The value of this option should correspond with the sort sequence in the data sequencing for the version of the Auto Fulfillment for Fulfillment Management program (R4277701) specified in the Auto Fulfillment (R4277701) option in the Supply Monitor group box of the Sales Advisor Constants (P42X00).

10. Complete this field in the Supply/Demand group box if you select Supply/Demand in the Activate group box:
Days for Supply Demand
Represents the number of days to display on either side of the pick date in the supply monitor graph. If you leave this option blank, the system uses 30 as the default value.

11. Click OK.

3.5 Setting Up Sales Advisor Included Document Types
This section provides an overview of sales advisor included document types and discusses how to:
- Set up sales advisor included document types.
- Revise sales advisor included document types.
- Copy sales advisor included document types.

3.5.1 Understanding Sales Advisor Included Document Types
You use the Sales Advisor Included Document Types program (P42X001) to specify the order document types to include for a Sales Advisor feature when you enter a sales order. You enter multiple values from user-defined code (UDC) 00/DT to include in a Sales Advisor feature. You can exclude document types for specific sales order transactions that you do not want evaluated by the Sales Advisor. For example, you do not want to include internal transfer orders and credit orders in the display of profit information.

The system stores included order types for a Sales Advisor feature in the Sales Advisor Included Document Types table (F42X001).

3.5.2 Setting Up Sales Advisor Included Document Types
To set up document types for sales advisor features:
1. Access the Add Sales Advisor Included Document Types form.

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Form ID</th>
<th>Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Sales Advisor Included Document Types</td>
<td>W42X001A</td>
<td>Sales Advisor Setup (G42X41).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Select Sales Advisor Included Document Types (P42X001).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click Add on the Work With Sales Advisor Included Document Types form.</td>
</tr>
</tbody>
</table>

2. On the Add Sales Advisor Included Document Types form, complete these fields:

Sales Advisor Feature
Enter a value from UDC (42X/DT) that identifies the type of Sales Advisor feature.

The following Sales Advisor features are defined by the system and should not be changed:

01: Cross Sell and Frequency
02: Profit Simulation
03: Order Profit
Document Type
Enter a value from UDC (00/DT) that identifies the origin and purpose of the transaction. Oracle reserves several prefixes for document types, such as vouchers, invoices, receipts, and timesheets. The reserved document type prefixes for codes are:

S: Sales order documents.
P: Accounts payable documents.
R: Accounts receivable documents.
T: Time and Pay documents.
I: Inventory documents.
O: Purchase order documents.

Document Type Description
Displays the description of the document type.

**Note:** Enter all required order types for the Sales Advisor feature.

3. Click OK.
4. Click Close.

### 3.5.3 Revising Sales Advisor Included Document Types

To revise sales advisor included document types:

1. Access the Edit Sales Advisor Included Document Types form.

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Form ID</th>
<th>Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work With Sales Advisor Included Document Types</td>
<td>W42X001C</td>
<td>Sales Advisor Setup (G42X41). Select Sales Advisor Included Document Types (P42X001).</td>
</tr>
<tr>
<td>Edit Sales Advisor Included Document Types</td>
<td>W42X001A</td>
<td>Select a row for a specific Sales Advisor feature on the Work With Sales Advisor Included Document Types form. Click Select.</td>
</tr>
</tbody>
</table>

2. On the Edit Sales Advisor Included Document Types form, enter values from UDC 00/DT in the Document Type field.

Enter all required order types for the Sales Advisor feature.

**Note:** The system issues a message to rerun the Buying Frequency Load program (R42X010) when you change the included document types for the 01 (cross sell and frequency) sales advisor feature.

3. To remove an included document type:
   a. Select a row.
   b. Click the Delete button.
c. If you receive the confirmation message box, click OK.

---

**Note:** You can also remove an included document type from a Sales Advisor feature by selecting the Delete button on the Work With Sales Advisor Included Document Types form.

---

4. Click OK.

5. Review the included document types for the Sales Advisor feature on the Work With Sales Advisor Included Document Types form.

6. Click Close.

### 3.5.4 Copying Sales Advisor Included Document Types

To copy sales advisor included document types:

1. Access the Copy Sales Advisor Included Document Types form.

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Form ID</th>
<th>Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work With Sales Advisor Included Document Types</td>
<td>W42X001C</td>
<td>Sales Advisor Setup (G42X41). Select Sales Advisor Included Document Types (P42X001).</td>
</tr>
<tr>
<td>Copy Sales Advisor Included Document Types</td>
<td>W42X001A</td>
<td>Select a row for a specific Sales Advisor feature on the Work With Sales Advisor Included Document Types form. Click Copy.</td>
</tr>
</tbody>
</table>

2. On the Copy Sales Advisor Included Document Types form, enter values from UDC 00/DT in the Document Type field.

Enter all required order types for the Sales Advisor feature.

3. Click OK.

---

**Note:** When you click OK, the system issues the error message "Duplicate key not allowed." Thus, the system skips the duplicate document type values that existed for the Sales Advisor feature and saves the new (non-duplicate) document type values entered on the form.

---

4. Click Cancel.

5. Click Find.

Verify the included document types for the Sales Advisor feature on the Work With Sales Advisor Included Document Types form.

6. Click Close.
4

Working With Dynamic Product Suggestions

This chapter contains the following topics:

- Section 4.1, "Understanding Dynamic Product Suggestions"
- Section 4.2, "Working with Line Advisor"
- Section 4.3, "Working with Line Up-Sell"
- Section 4.4, "Working with Preferred Items"
- Section 4.5, "Working with Order Advisor"
- Section 4.6, "Working with Frequency Items"
- Section 4.7, "Working with Cross Sell Items"
- Section 4.8, "Working with Order Up-Sell"

4.1 Understanding Dynamic Product Suggestions

Dynamic product suggestions provide real-time recommendations to the customer service representative (CSR) for additional sales opportunities. The system builds product suggestions using real-time processing of large volumes of current and previous sales order records. The CSR can view product suggestions during order capture and select items to add to the sales order.

You use the Line Advisor tab at the sales order header level of the Sales Order Entry program (P42101) to offer two types of up-sell opportunities:

- Up-sell items: Quantity increases to receive discounts based on all line level quantity discounts.
- Preferred items: Up-sell to another item based on a relationship to an item ordered on a sales order.

You use the Order Advisor tab at the sales order header level of the Sales Order Entry program to offer two types of cross sell opportunities:

- Cross sell items: Top items ordered with an item historically based on count.
- Frequency items: Items ordered most frequently in a specific time period.

You can also link to the Order Up-Sell form from the Order Advisor tab. Order up-sell suggests basket and order level adjustments for which the order may qualify.

You review the additional quantity and item suggestions during sales order entry. Although the information is available for selection, you are not required to act upon it.
4.2 Working with Line Advisor

This section provides an overview of line advisor and discusses how to:

- (Optional) Run the Line Advisor Workfile Purge program.
- Work with line advisor.

4.2.1 Understanding Line Advisor

Dynamic product suggestions display on the Line Advisor tab at the sales order header level of the Sales Order Entry program (P42101). The Line Advisor tab gives you information related to a specific sales order line and enables you to view the up-sell opportunities that the system found based on the item and quantity that the customer is purchasing, and preferred items.

The P42101 program uses the Reusable Subform for Line Advisor Reusable Subform program (P421009) to display the Line Advisor subform (S421009A) as a tab on the sales order header.

From the Line Advisor tab, you have access to the opportunities on the Up-Sell Opportunities (S421009C) and Preferred Items (S421009B) subforms.

The system processes Line Advisor functionality only for new lines entered in Add, Update, and Copy mode.

You access the Line Advisor tab by selecting the tab or selecting the Line Advisor grid cell icon in the Line Advisor column in the Sales Order Detail grid.

The Line Advisor tab contains the following features:

- Refresh button.
- Line Number field.
- Item Number field.
- Branch/Plant field.
- Up-Sell Opportunities grid.
  Displays up to four quantity level up-sell opportunities for the selected sales order line in the Up-Sell Opportunities subform (S421009C).
- Preferred Items grid.
  Displays all items set up as preferred items in the Item Cross Reference program (P4104) using cross-reference type P for the selected sales order line in the Preferred Items subform (S421009B).
  Preferred items must exist in the branch/plant of the original item entered on the sales order. If the preferred item does not have that valid branch/plant, then the system does not display the preferred item.

4.2.2 (Optional) Running the Line Advisor Workfile Purge Program

From the Sales Advisor Workfile Purges menu (G42X312), select Line Advisor Workfile Purge (F42X010W).

The system may not clean up work files properly if sales order processing ends abnormally or a browser is closed with an active order session open. To clean up any records that are no longer used, you must run the Line Advisor Work File Purge program (R42X010WP) to delete all work file records that are more than one day old.
The Line Advisor Workfile Purge program purges records from the Line Advisor Work File table (F42X010W).

4.2.3 Working with Line Advisor

To work with line advisor:

1. Access the Enter New Order form or Manage Existing Order form.

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Form ID</th>
<th>Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter New Order</td>
<td>W42101D</td>
<td>Sales Order Processing (G4211).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Select Create Sales Order - Header First.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click Save and Close on the Order Header</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Revisions form.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Select Create Sales Order - Detail First.</td>
</tr>
<tr>
<td>Manage Existing</td>
<td>W42101C</td>
<td>Sales Order Processing (G4211).</td>
</tr>
<tr>
<td>Order</td>
<td></td>
<td>• Select Update Sales Order - Header First.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Select Update Sales Order - Detail First.</td>
</tr>
</tbody>
</table>

2. On the Enter New Order form or Manage Existing Order form, enter order header and detail information, as applicable.

   See “Entering Sales Order Header and Detail Information” in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.

3. Select the Line Advisor tab.

   Alternatively, select the Line Advisor grid cell icon in the Line Advisor column in the Sales Order Detail grid.

4. On the Line Advisor tab, use these fields to work with quantity level and preferred item up-sell opportunities:

   **Select line number to view**
   
   Displays the line number related to the selected detail line in the selected Sales Order Detail grid.

   Select a line number to view in the Up-Sell Opportunities, Preferred Items, and Sales Order Detail grids by clicking the Previous Line and Next Line buttons.

   **Item Number**
   
   Displays a number that identifies the item. This is the item number related to the selected detail line in the Sales Order Detail grid.

   **Branch/Plant**
   
   Displays an alphanumeric code that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.

   The value represents the detail branch/plant for the selected sales order detail line.

   See Working with Line Up-Sell.

   See Working with Preferred Items.

5. Click the Refresh button, if applicable.

   When you click the Refresh button, the system updates the Line Advisor tab with the most current information in the Line Advisor Work File table (F42X010W).
For example, if you change or add a new sales order detail line while on the Line Advisor tab, you click the Refresh button to update the up-sell opportunities for the changed or new line.

If you enter a sales order detail line or change a detail line and tab out of the line before saving the order, you click the Refresh button to update the up-sell opportunities or preferred items for the updated sales order line.

6. Complete the sales order, as applicable.

4.3 Working with Line Up-Sell

This section provides an overview of line up-sell, lists prerequisites, and discusses how to work with line up-sell.

4.3.1 Understanding Line Up-Sell

The system provides real-time visibility to line up-sell opportunities, which enables you to sell larger quantities and provide the best available price to your customer.

The system supports line up-selling when:

- Advanced Pricing is ON.
- The line on the sales order is a new line in any mode.

The system determines the quantity increases to suggest by evaluating the schedule on the sales order. The system checks quantity breaks for all line level adjustments on the pricing schedule.

When up-sell opportunities exist for an item, the system displays the Line Advisor grid cell icon in the Line Advisor field in the Sales Order Detail grid.

To access the Up-Sell Opportunities subform (S421009C) when up-sell opportunities exist, you perform one of these actions:

- Click the Line Advisor grid cell icon in the Line Advisor field of the detail line in the Sales Order Detail grid.
  
  The system opens the Line Advisor tab and highlights the corresponding row in the Sales Order Detail grid.

- Click the Line Advisor tab.

You can view the suggested order quantity, transaction unit of measure, unit price, extended price, and pricing unit of measure in the grid on the Up-Sell Opportunities form. The system displays the foreign prices if the order is a foreign order and the taxed prices if the sales order uses tax inclusive pricing.

The Up-Sell Opportunities form displays a maximum of four up-sell opportunities for each item on the sales order. The number of up-sell opportunities displayed is a hard-coded value.

---

**Note:** The system only displays the up-sell opportunity if the price is lower than the current line's price or it has free goods.

The system does not have a threshold for how much additional quantity to recommend. You cannot change the quantity in the Up-Sell Opportunities form.

The system uses the JD Edwards EnterpriseOne Advanced Pricing system to determine the price for each quantity break.
You can hide all the price columns on the Up-Sell Opportunities grid by setting the Display or Hide Price Fields processing option on the Display tab of the Sales Order Entry program (P42101) to a value of 2.

The system also provides an icon when a free good is attached to the quantity increase. The green price tag icon appears in the F/G (free goods) field of the related quantity level break in the Up-Sell Opportunities grid. The free goods icon contains hover text stating Free goods exist for this quantity.

When you access the Line Advisor, the system selects the row for the first suggested quantity by default. To update the sales order with the quantity, you click the Select Quantity button. If a free good is associated with the quantity selected, then the free good also gets added to the sales order.

Line up-selling uses the following tables:

- Preference Hierarchy File (F40073).
- Price Adjustment Schedule (F4070).
- Price Adjustment Type (F4071).
- Price Adjustment Detail (F4072).
- Group Code Key Definition Table (F4092).
- Item Key ID Master File (F40941).
- Customer Key ID Master File (F40942).

The system stores the up-sell opportunities in the Line Advisor Work File table (F42X010W).

The system does not present the Line Advisor grid cell icon under the following conditions:

- Standard pricing is used.
- The line is in change mode while editing an existing sales order.
- The sales order line entered contains an order line quantity that is greater than any adjustment quantity level break.
- The sales order does not have an advanced pricing schedule associated with it or the advanced pricing schedule for the sales order does not have any line level quantity break adjustment.
- The item is a configured item or kit with a pricing method different than method 2.

### 4.3.2 Prerequisites

Before you complete the task in this section:

- Verify that Advanced Pricing is ON.
  

- Verify that quantity level breaks are defined.

### 4.3.3 Working with Line Up-Sell

To work with line up-sell:

1. Access the Enter New Order form or Manage Existing Order form.
Working with Line Up-Sell

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Form ID</th>
<th>Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter New Order</td>
<td>W42101D</td>
<td>Sales Order Processing (G4211).</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>■ Select Create Sales Order - Header First (P42101).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>■ Select Create Sales Order - Detail First (P42101).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>■ Click Save and Close on the Order Header Revisions form.</td>
</tr>
<tr>
<td>Manage Existing Order</td>
<td>W42101C</td>
<td>Sales Order Processing (G4211).</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>■ Select Update Sales Order - Header First (P42101).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>■ Select Update Sales Order - Detail First (P42101).</td>
</tr>
</tbody>
</table>

2. On the Enter New Order form or Manage Existing Order form, enter order header and detail information, as applicable.

See "Entering Sales Order Header and Detail Information" in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.

3. Select the Line Advisor grid cell icon in the Line Advisor column in the Sales Order Detail grid.

**Line Advisor**

Displays an icon if information exists in Line Advisor. If no information exists, the system does not display the icon.

4. On the Up-Sell Opportunities subform, review these fields for each opportunity:

**F/G (free goods)**

Displays an icon if a free good is associated with the up-sell opportunity quantity. The price adjustment that the system uses to generate the opportunity is set up with a free good based on the order quantity.

**Quantity**

Displays the quantity of units suggested to receive the price break adjustment. The quantity is expressed in the transaction unit of measure.

**UOM (unit of measure)**

Displays a value from UDC (00/UM) that indicates the quantity in which to express an inventory item, for example, CS (case) or BX (box).

On the Up-Sell Opportunities grid, the UOM relates to the Quantity field.

**Unit Price**

Displays the price to be charged for one unit of this item. The unit price is expressed in the pricing unit of measure and includes adjustments.

**Extended Price**

Displays the number of units in the Quantity field multiplied by the unit price.

**Pricing UOM (pricing unit of measure)**

Displays a value from UDC (00/UM) that indicates the unit of measure in which you price the item.

5. Select a row in the Up-Sell Opportunities subform based on quantity and price.
6. Click the Select Quantity button.  
   The system updates the Sales Order Detail grid with the selected quantity and corresponding price.

7. On the Line Advisor tab, click the Next Line button to move to the next line of the order with line advisor information.
   The system updates the item number in the Item Number field and the branch/plant in the Branch/Plant field on the Line Advisor tab and highlights the related order line in the Sales Order Detail grid.

8. Review and select up-sell opportunities, as applicable.

9. Complete the sales order, as applicable.

### 4.4 Working with Preferred Items

This section provides an overview of preferred items, lists prerequisites, and discusses how to:
- Set up cross-references for preferred items.
- Work with preferred items.

#### 4.4.1 Understanding Preferred Items

Preferred items are an up-sell to another item based on a relationship to an item ordered on a sales order.

The system provides real-time visibility to preferred item up-sell opportunities, which enables you to sell higher profit margin items, higher quality items, or promotional items. A preferred item also enables you to substitute the item on the order, not add an additional item.

The system enables you to show the adjusted price for the preferred item to the customer. Preferred items also provide visibility to profit margin and availability information.

The system supports preferred item up-selling when:
- Preferred items are set up in the Item Cross Reference program (P4104) using cross-reference type P (preferred items).
  See "Setting Up Item Cross-References" in the *JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide*.
- The line on the sales order is a new line.
- The quantity on the line is greater than 0 (zero).
  The system does not support negative lines (credit) for preferred items.
- The item on the line is not a kit parent, kit component, configured parent, configured component, or bulk item.
- The line on the sales order is not a canceled line.

When preferred item up-sell opportunities exist for an item, the system displays the Line Advisor grid cell icon in the Line Advisor field in the Sales Order Detail grid.

To access the Preferred Items subform (S421009B) when preferred item opportunities exist, you perform one of these actions:
• Click the Line Advisor grid cell icon in the Line Advisor field of the detail line in the Sales Order Detail grid.

The system opens the Line Advisor tab and highlights the corresponding row in the Sales Order Detail grid.

• Click the Line Advisor tab.

The Preferred Items subform displays up-sell opportunities for each item on the sales order. The system displays all preferred items even if the item is already on the sales order. The system can suggest kits, configured items, and bulk items as preferred items.

You can view the quantity, UOM, item number, item description, pricing unit of measure, unit price, unit cost, percent profit margin, and quantity available in the Preferred Items subform. The Quantity field in the Preferred Items grid is the same as the Quantity Ordered field in the related sales order line.

The system uses the transaction UOM of the related sales order line unless there is no conversion to that UOM for the preferred item. If the system cannot convert the preferred item to the UOM in the grid, then the system uses the preferred item’s primary UOM and the quantity of the related sales order item in its primary UOM.

The system calculates the price for the quantity and UOM based on the related sales order line’s quantity and UOM.

The system displays the foreign prices if the order is a foreign order and the taxed prices if the sales order uses tax inclusive pricing. Thus, the price fields displayed in the Preferred Items subform are the same fields as shown in the Sales Order Detail grid.

You must set the Display or Hide Cost Fields and Display or Hide Price Fields processing options on the Display tab of the Sales Order Entry program (P42101) to blank or 1 for the unit price, unit cost, and profit margin fields to appear in the Preferred Items subform. If you set the Display or Hide Cost Fields or Display or Hide Price Fields processing options to 2, then the system does not display the unit price or unit cost fields in the Preferred Items subform.

If either the Display or Hide Cost Fields or the Display or Hide Price Fields processing option is set to 2, then the system does not display the profit margin field.

You can select only one preferred item per sales order detail line in the Preferred Items subform. You can select more than one preferred item in a sales order.

The system performs the preferred item logic and displays preferred items for the newly added sales order line.

Also, the system determines if there are any preferred items for the new items added to the sales order from the Order Advisor tab.

If you add a sales order line that has a preferred item; change the order quantity, transaction UOM, or branch/plant field in the Sales Order Detail grid before saving the order; and click the Refresh button on the Line Advisor tab, then the system reprocesses the preferred items for that line.

The system stores items to suggest in the Preferred Items subform in the Line Advisor Work File table (F42X010W). After you select preferred items and click the Select Line button, the system stores data in the Sales Order Workfile. After you add preferred items to the sales order and save it, the system stores the data in the Sales Order Detail File table (F4211).

The system does not present the Line Advisor grid cell icon for preferred items under the following conditions:
■ The line is in change mode while editing an existing sales order.
■ The line is an existing sales order line while the order is in copy mode.

4.4.2 Prerequisites

Before you complete the tasks in this section:

■ Set the Revise by Item or Address processing option in the Item Cross Reference program (P4104) to a value of 1 to display the Item Cross Reference Revisions By Item form.

See "Setting Processing Options for Item Cross Reference (P4104)" in the JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide.

■ Set the Display or Hide Cost Fields and Display or Hide Price Fields processing options on the Display tab of the Sales Order Entry program (P42101) to blank or 1 for the unit cost, unit price, and profit margin fields to appear in the Preferred Items subform. If you set the Display or Hide Cost Fields or Display or Hide Price Fields processing options to 2, then the system does not display the unit cost or unit price fields in the Preferred Items subform.

If either the Display or Hide Cost Fields or the Display or Hide Price Fields processing option is set to 2, then the system does not display the profit margin field.

See "Setting Processing Options for the Sales Order Entry Program (P42101)" in the JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide.

4.4.3 Setting Up Cross-References for Preferred Items

To set up cross-references for preferred items:

1. Access the Item Cross Reference Revisions By Item form.

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Form ID</th>
<th>Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Cross Reference Revisions By Item</td>
<td>W4104C</td>
<td>Inventory Inquiries (G41112).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Select Item Cross-Reference (P4104).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click Add on the Work with Item Cross Reference form.</td>
</tr>
</tbody>
</table>

2. Enter P in the Cross Reference Type Code field.

Note: The Base Price Indicator, Adjustment Indicator, Customer Supplier Item Revision Level, and Card Number fields do not apply to cross reference type P so the system hides these fields.

Cross Reference Type Code

Enter a value from user-defined code (UDC) (41/DT) that identifies the type of cross-reference set up for this customer. Examples of cross-reference types include:

■ Substitutes
■ Replacements
■ Bar codes
■ Customer item numbers
■ Supplier item numbers

3. Enter an item number in the Item Number field.

   **Item Number**
   Enter a number that the system assigns to an item. It can be in short, long, or third item number format.

4. Enter values in these fields, as applicable:

   **Address Number**
   Enter the address number of the customer or supplier.

   **Cross Reference Item Number**
   Enter the cross-reference item number that the system assigns to an item number. A cross-reference number enables you to use a supplier’s item number if it is different from your own item number when you are processing an order or printing.

   **Effect From (effective from)**
   Enter the date when a transaction, contract, obligation, preference, or policy rule becomes effective.

   **Effect Thru (effective through)**
   Enter the date on which a transaction, text message, agreement, obligation, or preference has expired or been completed.

   **Cross Reference Description**
   Enter brief information about an item; a remark or an explanation.

   **Cross Reference Description line 2**
   Enter a second, 30-character description, remark, or explanation.

5. Click OK.

6. On the Work With Item Cross Reference form, enter values in the following fields and click Find:

   ■ Item Number
   ■ X-Ref Type (cross reference type code)

7. Verify the preferred item cross-reference setup.

8. Click Close.

### 4.4.4 Working with Preferred Items

To work with preferred items:

1. Access the Enter New Order form or Manage Existing Order form.
Form Name | Form ID | Navigation
---|---|---
Enter New Order | W42101D | Sales Order Processing (G4211).
- Select Create Sales Order - Header First (P42101).
  Click Save and Close on the Order Header Revisions form.
- Select Create Sales Order - Detail First (P42101).
Manage Existing Order | W42101C | Sales Order Processing (G4211).
- Select Update Sales Order - Header First (P42101).
- Select Update Sales Order - Detail First (P42101).

2. On the Enter New Order form or Manage Existing Order form, enter order header and detail information, as applicable.

See "Entering Sales Order Header and Detail Information" in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.

3. Select the Line Advisor grid cell icon in the Line Advisor column in the Sales Order Detail grid.

**Line Advisor**
Displays an icon if information exists in Line Advisor. If no information exists, the system does not display the icon.

4. On the Preferred Items subform, review these fields for each opportunity:

**Item Number**
Displays a number that the system assigns to an item. It can be in short, long, or third item number format.

The item number for the preferred item to be suggested and will replace the current sales order line.

**Description**
Displays the description of the item.

**Unit Price**
Displays the price to be charged for one unit of this item. The unit price is expressed in the pricing unit of measure and includes adjustments.

The system displays the same unit price field as in the Sales Order Entry program (P42101).

**Pricing UOM (pricing unit of measure)**
Displays a UDC (00/UM) that indicates the unit of measure in which you usually price the item.

**Qty Available (quantity available)**
Displays a number that indicates the quantity that is available.

For example, the available quantity might consist of the on-hand quantity minus commitments, reservations, and backorders.
Availability is user defined. You can set up availability in the Branch/Plant Constants program (P41001).

5. Select a row in the Preferred Items subform based on the customer’s request.

6. Click the Select Line button.

   The system cancels the original order line in the Sales Order Detail grid and adds a new line under the canceled line that contains the selected preferred item.

   The line number increment is .001.

7. On the Line Advisor tab, click the Next Line button to move to the next line of the order with line advisor information.

   The system updates the item number in the Item Number field on the Line Advisor tab and highlights the related order line in the Sales Order Detail grid.

8. In the Sales Order Detail grid, change the quantity for an item.

   You can change the quantity of the selected preferred item in the Sales Order Detail grid and the system updates the quantity in the subforms in the Line Advisor tab.

9. Review and select preferred item opportunities, as applicable.

10. Complete the sales order, as applicable.

### 4.5 Working with Order Advisor

This section provides an overview of order advisor, lists prerequisites, and discusses how to:

- (Optional) Run the Order Advisor Workfile Purge program.
- Work with order advisor.

#### 4.5.1 Understanding Order Advisor

Dynamic product suggestions display on the Order Advisor tab at the sales order header level of the Sales Order Entry program (P42101). The Order Advisor tab gives you historical information related to items ordered based on count and items ordered frequently in a specific time period. Thus, enabling you to view the cross sell and up-sell opportunities that the system found based on search criteria such as item, customer, customer group, and time frame.

The P42101 program uses the Reusable Subform for Order Advisor Reusable Subform program (P421010) to display the Order Advisor subform (S421010A) as a tab on the sales order header. The Order Advisor tab is available if either the Cross Sell or Frequency option is activated in the Sales Advisor Constants program (P42X00).

The system hides the Order Advisor tab if both the Cross Sell and Frequency options are not activated in the Sales Advisor Constants program.

The Order Advisor tab enables access to three types of cross sell opportunities:

- Cross sell items: Top items ordered historically based on count.
- Frequency items: Items ordered most frequently in a specific time period.
- Order up-sell: Order additions that qualify for basket and order level adjustments.

The Order Advisor tab provides a link to the Order Up-Sell form.

The system supports cross selling opportunities when:
The line on the sales order is a new line entered in add, update, or copy mode.

The quantity on the line is greater than zero.

The system displays the Order Advisor tab when the sales order is in update or copy mode. The cross sell and preferred item opportunities are blank and the system populates the forms only when new lines are entered and items are found.

You access the Order Advisor tab by clicking on the tab.

The Order Advisor tab contains the following features:

- Add to Order button.
  Click to update the sales order with the items selected in the Order Advisor subform.

- Refresh button.
  Click to update the Order Advisor subform on the Order Advisor tab with the most current information in the Order Advisor Work File table (F42X020W).
  The system reloads the Order Advisor subform with current cross sell and frequency item information when new lines are added to the sales order. The system may remove items from the subform. The system displays cross sell and frequency items accumulated for all items on the sales order, not on a line by line basis.
  For example, if you enter a new line on the sales order, you click the Refresh button to refresh the subform with new items related to the new sales order line.

- Order Up-Sell link.
  Click the link to access the Order Up-Sell form.

- Available Items Only check box.
  Select to display only items with available quantity.

- Order Advisor subform.
  Displays the cross sell and frequency item opportunities for all sales order line in the Sales Order Detail grid.
  The Order Advisor subform displays a maximum of six frequency items before a sales order detail line is entered in the Sales Order Detail grid. The number of frequency item opportunities displayed is a hard-coded value.
  If you select both cross sell and frequency options in the Sales Advisor Constants program, then cross sell items display before frequency items in the Order Advisor subform when sales order detail lines are entered.
  After you enter sales order lines, the Order Advisor subform displays three frequency and three cross sell items. The number of frequency and cross sell item opportunities displayed is a hard-coded value of six. If not enough cross sell or frequency items exist, then the system displays more of one type and less of another. For example, the system displays two frequency items and four cross sell items.
  If the same item is found by both the frequency and cross sell searches, then the system displays the item as a cross sell opportunity.

---

**Note:** If no cross sell or frequency item opportunities exist for the sales order, then the system displays the Order Advisor tab if the constants are activated but the subform is blank.
The cross sell and frequency opportunities do not include items that already exist in the sales order.

You can select multiple lines by entering a quantity for multiple lines in the Order Advisor subform. After you enter quantities for the desired items and click the Add to Order button, the system adds new lines to the bottom of the Sales Order Detail grid. The system does not recalculate prices when you change the quantity on the Order Advisor tab.

### 4.5.2 Prerequisites

Before you complete the task in this section, you must:

- Set up frequency item functionality.  
  See Working with Frequency Items.
- Set up cross sell item functionality.  
  See Working with Cross Sell Items.

### 4.5.3 (Optional) Running the Order Advisor Workfile Purge Program

From the Sales Advisor Workfile Purges menu (G42X312), select Order Advisor Workfile Purge (F42X020W).

The system may not clean up work files properly if sales order processing ends abnormally or a browser is closed with an active order session open. To clean up any records that are no longer used, you must run the Order Advisor Work File Purge program (R42X020WP) to delete all work file records that are more than one day old. The Order Advisor Workfile Purge program purges records from the Order Advisor Work File table (F42X020W).

### 4.5.4 Working with Order Advisor

To work with order advisor:

1. Access the Enter New Order form or Manage Existing Order form.

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Form ID</th>
<th>Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter New Order</td>
<td>W42101D</td>
<td>Sales Order Processing (G4211).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>■ Select Create Sales Order - Header First.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>■ Select Create Sales Order - Detail First.</td>
</tr>
<tr>
<td>Manage Existing Order</td>
<td>W42101C</td>
<td>Sales Order Processing (G4211).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>■ Select Update Sales Order - Header First.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>■ Select Update Sales Order - Detail First.</td>
</tr>
</tbody>
</table>

2. On the Enter New Order form or Manage Existing Order form, enter order header and detail information, as applicable.

  See "Entering Sales Order Header and Detail Information" in the JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide.

3. Select the Order Advisor tab.
4. On the Order Advisor tab, select the Available Items Only option to display only items with available quantity, if applicable.

5. On the Order Advisor tab, use these fields to work with frequency and cross sell item opportunities, as applicable:

**Quantity**
Enter the quantity of units to add to the sales order.

**UOM (unit of measure)**
Enter a UDC (00/UM) that indicates the quantity in which to express an inventory item, for example, CS (case) or BX (box).

**Item Number**
Displays a number that the system assigns to an item. It can be in short, long, or third item number format.

**Item Description**
Displays the description of the item.

**Unit Price**
Displays the price to be charged for one unit of this item. The unit price is expressed in the pricing unit of measure and includes adjustments.

**Pricing UOM (pricing unit of measure)**
Displays a UDC (00/UM) that indicates the unit of measure in which you usually price the item.

**Unit Cost**
Displays the amount per unit, derived by dividing the total cost by the unit quantity.

**% Profit Margin (percent profit margin)**
Displays the profit margin for the suggested item.

The system hides the % Profit Margin field if you set the Display or Hide Cost Fields or Display or Hide Price Fields processing options to 2.

The formula for calculating the percent profit margin is \((\text{Price} - \text{Cost}) / \text{Price}) \times 100.\)

**Qty Available (quantity available)**
Displays a number that indicates the quantity that is available.

For example, the available quantity might consist of the on-hand quantity minus commitments, reservations, and backorders.

Availability is user defined. You can set up availability in the Branch/Plant Constants program (P41001).

**Branch/Plant**
Displays an alphanumeric code that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.

The value represents the detail branch/plant associated with the frequency and cross sell item opportunities.
4.6 Working with Frequency Items

This section provides an overview of frequency items, lists prerequisites, and discusses how to:

- Run the Buying Frequency Load program.
- Work with frequency items.

4.6.1 Understanding Frequency Items

Frequency items are additional sales opportunities based on items ordered frequently in a specific time period. Frequency items may follow trending or seasonal buying patterns.

The system bases frequency items on header information. Frequency items do not exist on the current sales order and are not related to items on the order.

For the system to determine frequency item opportunities, you must:

- Activate the Frequency feature.
- Define the included document types.
- Define parameters for the frequency item search.
- Run the Buying Frequency Load program (R42X010).

See "Setting Up Sales Advisor Constants".

The system stores frequency item information in the Buying Frequency by Customer table (F42X010).

After you install the JD Edwards EnterpriseOne In-Memory Sales Advisor system, activate the Frequency feature, and set the search criteria in the Sales Advisor...
Constants and Sales Order Feature Doc Types programs, you must run the Buying Frequency Load program. You run the Buying Frequency Load program only once for the initial load of the Buying Frequency by Customer table (F42X010).

As the Buying Frequency Load program runs, the system searches sales records in the Sales Order Detail File (F4211) and Sales Order History File (F42119) tables to determine which items were sold the most based on the customer search criteria. The program counts and records the number of items ordered by customer in the Buying Frequency by Customer table (F42X010). The program does not count the quantity of the items.

Note: If you do not have information in the F4211 and F42119 tables, then you do not run the Buying Frequency Load program.

When you enter sales orders, the system updates the count to the F42X010 table to keep it up to date. If you change the values in the frequency fields in the Sales Advisor Constants program, then you must rerun the Buying Frequency Load program.

The system does not include kit parent and components, configured parent and components, sales lines with a negative quantity such as credit order lines, and canceled lines in the included selection for frequency items.

The system uses the Order Date in the F4211 and F42119 tables when searching for frequency items.

You must use the Sales Order Entry program (P42101) to work with frequency items on sales orders. The system displays frequency item opportunities in the Order Advisor subform (S421010A) on the Order Advisor tab.

When you enter a sales order header, the system displays only frequency items in the Order Advisor subform. Frequency items are ranked based on the count and are marked with a label of Frequent in the Type field.

Additional frequency item information on the Order Advisor subform includes the item number, item description, branch/plant, unit price, pricing unit of measure, unit cost, and percent profit margin.

The system displays the foreign prices if the order is set to foreign currency or the taxed unit prices if the order is in taxed unit pricing mode. Thus, the price fields displayed in the Order Advisor subform are the same fields as shown in the Sales Order Detail grid.

Set the Display or Hide Cost Fields and Display or Hide Price Fields processing options on the Display tab of the Sales Order Entry program (P42101) to blank or 1 for the unit cost, unit price, and profit margin fields to appear in the Order Advisor subform. If you set the Display or Hide Cost Fields or Display or Hide Price Fields processing options to 2, then the system does not display the unit cost or unit price fields in the Order Advisor subform.

If either the Display or Hide Cost Fields or the Display or Hide Price Fields processing option is set to 2, then the system does not display the profit margin field.

The Order Advisor subform displays a maximum of six frequency items before a sales order detail line is entered in the Sales Order Detail grid. The number of frequency item opportunities displayed is a hard-coded value.

If you select both cross sell and frequency in the Sales Advisor Constants program, then cross sell items display before frequency items in the Order Advisor subform when sales order detail lines are entered.
After you enter sales order lines, the Order Advisor subform displays three frequency and three cross sell items. The number of frequency and cross sell item opportunities displayed is a hard-coded value of six. If not enough cross sell or frequency items exist, then the system displays more of one type and less of another. For example, the system displays two frequency items and four cross sell items.

If the same item is found by both the frequency and cross sell searches, then the system displays the item as a cross sell opportunity.

---

**Note:** If you do not activate both the Cross Sell and Frequency options in the Sales Advisor Constants program, then the system does not display the Order Advisor tab.

---

You use the Refresh button to update the Order Advisor subform. You use the Available Items Only option to display only items with available quantity.

Oracle recommends that you run the Buying Frequency Load program whenever you make changes to the Sales Advisor Constants that impact the Frequency feature. If you change the search criteria, time period, or document types, then the system issues a warning message that indicates you should run the Buying Frequency Load program.

### 4.6.2 Prerequisites

Before you complete the tasks in this section:

- Select the Frequency option in the Activate group box in the Sales Advisor Constants program.
- Set the document types to include.
  
  See Setting Up Sales Advisor Included Document Types.
- Select an option in the Search Criteria group box in the Sales Advisor Constants program.
- Set up the fields in the Frequency Time Frame group box in the Sales Advisor Constants program.
  
  See Setting Up Sales Advisor Constants.
- (Optional) Run the Order Advisor Workfile Purge program to clean up the workfile.
  
  See (Optional) Running the Order Advisor Workfile Purge Program.

### 4.6.3 Running the Buying Frequency Load Program

From the Sales Advisor Setup menu (G42X41), select Buying Frequency Load.

### 4.6.4 Working with Frequency Items

To work with frequency items:

1. Access the Enter New Order form or Manage Existing Order form.
<table>
<thead>
<tr>
<th>Form Name</th>
<th>Form ID</th>
<th>Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter New Order</td>
<td>W42101D</td>
<td>Sales Order Processing (G4211).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Select Create Sales Order - Header First (P42101).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Click Save and Close on the Order Header Revisions form.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Select Create Sales Order - Detail First (P42101).</td>
</tr>
<tr>
<td>Manage Existing</td>
<td>W42101C</td>
<td>Sales Order Processing (G4211).</td>
</tr>
<tr>
<td>Order</td>
<td></td>
<td>- Select Update Sales Order - Header First (P42101).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Select Update Sales Order - Detail First (P42101).</td>
</tr>
</tbody>
</table>

2. On the Enter New Order form or Manage Existing Order form, enter order header and detail information, as applicable.

See "Entering Sales Order Header and Detail Information" in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.

3. Select the Order Advisor tab.

4. On the Order Advisor subform, review these fields for each opportunity:

   **Quantity**
   Enter the quantity of units to add to the sales order.

   **UOM (unit of measure)**
   Enter a UDC (00/UM) that indicates the quantity in which to express an inventory item, for example, CS (case) or BX (box).

   **Item Number**
   Displays a number that the system assigns to an item. It can be in short, long, or third item number format.

   **Item Description**
   Displays the description of the item.

   **Unit Price**
   Displays the price to be charged for one unit of this item. The unit price is expressed in the pricing unit of measure and includes adjustments.

   **Pricing UOM (pricing unit of measure)**
   Displays a UDC (00/UM) that indicates the unit of measure in which you usually price the item.

   **Unit Cost**
   Displays the amount per unit, derived by dividing the total cost by the unit quantity.

   **% Profit Margin (percent profit margin)**
   Displays the profit margin for the suggested item.

   The system hides the % Profit Margin field if you set the Display or Hide Cost Fields or Display or Hide Price Fields processing options to 2.
The formula for calculating the percent profit margin is \((\text{Price} - \text{Cost}) / \text{Price}\) * 100.

**Qty Available (quantity available)**
Displays a number that indicates the quantity that is available.

For example, the available quantity might consist of the on-hand quantity minus commitments, reservations, and backorders.

Availability is user defined. You can set up availability in the Branch/Plant Constants program (P41001).

**Branch/Plant**
Displays an alphanumeric code that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.

The value represents the detail branch/plant associated with the frequency and cross sell item opportunities.

**Type**
Displays the type of order level opportunity. This is how the system generated the opportunity. Values are:

- **Frequent**: The opportunity is a frequency item.
- **Cross Sell**: The opportunity is a cross sell item.

5. Enter a quantity and UOM for a frequency item in the Order Advisor subform.

You can select more than one item to add to the sales order.

6. Click the Add to Order button.

The system adds each frequency item as a new line on the sales order.

7. Review and select frequency item opportunities, as applicable.

8. Complete the sales order, as applicable.

---

**Note:** The system issues a warning message when you submit the sales order if frequency items exist and you have not accessed the Order Advisor tab.

---

### 4.7 Working with Cross Sell Items

This section provides an overview of cross sell items, lists prerequisites, and discusses how to work with cross sell items.

#### 4.7.1 Understanding Cross Sell Items

Cross sell items are additional sales opportunities of the top items ordered with an item historically based on count. Cross sell items do not exist on the current sales order and are related to items on the order.

The system supports cross sell items when:

- The line on the sales order is a new line.
- The quantity on the line is greater than zero.

For the system to determine cross sell item opportunities, you must:
Activate the cross sell feature.

Define the included document types.

Define parameters for the cross sell item search.

Define the cross sell time frame.

See "Setting Up Sales Advisor Constants".

The system searches sales records in the Sales Order Detail File (F4211) and Sales Order History File (F42119) tables to determine the top items based on count.

You must use the Sales Order Entry program (P42101) to work with cross sell items on sales orders. The system displays cross sell item opportunities in the Order Advisor subform (S421010A) on the Order Advisor tab.

The system ranks cross sell items by most popular based on how many times an item appears on other orders with the items on the current order. The system marks cross sell items with a label of Cross Sell in the Type field.

Additional cross sell item information on the Order Advisor subform includes the item number, item description, branch/plant, quantity available, unit price, pricing unit of measure, unit cost, and percent profit margin. The system uses the header branch/plant from the sales order and calculates availability for that branch/plant.

The system displays the foreign prices if the order is set to foreign currency or the taxed unit prices if the order is in taxed unit pricing mode. Thus, the price fields displayed in the Order Advisor subform are the same fields as shown in the Sales Order Detail grid.

Set the Display or Hide Cost Fields and Display or Hide Price Fields processing options on the Display tab of the Sales Order Entry program (P42101) to blank or 1 for the unit cost, unit price, and profit margin fields to appear in the Order Advisor subform. If you set the Display or Hide Cost Fields or Display or Hide Price Fields processing options to 2, then the system does not display the unit cost or unit price fields in the Order Advisor subform.

If either the Display or Hide Cost Fields or the Display or Hide Price Fields processing option is set to 2, then the system does not display the profit margin field.

If you select both cross sell and frequency in the Sales Advisor Constants program, then cross sell items display before frequency items in the Order Advisor subform when sales order detail lines are entered.

After you enter sales order lines, the Order Advisor subform displays three frequency and three cross sell items. The number of frequency and cross sell item opportunities displayed is a hard-coded value of six. If not enough cross sell or frequency items exist, then the system displays more of one type and less of another. For example, the system displays one frequency items and five cross sell items.

If the same item is found by both the frequency and cross sell searches, then the system displays the item as a cross sell opportunity.

---

**Note:** If you do not activate both the Cross Sell and Frequency options in the Sales Advisor Constants program, then the system does not display the Order Advisor tab.

---

The system calculates cross sell items as new lines are added to the order.
You use the Refresh button to update the Order Advisor subform. You use the Available Items Only option to display only items with available quantity.

The system stores cross sell items to suggest in the Order Advisor subform in the Order Advisor Work File table (F42X020W). After you select cross sell items and click the Add to Order button, the system stores data in the Sales Order Workfile. Once the cross sell items are added to the sales order and the order is saved, data is stored in the Sales Order Detail File table (F4211).

The system does not present cross sell opportunities for:

- Kit parents.
- Kit components.
- Configured parents.
- Canceled lines.
- Lines with a negative quantity ordered.
- Canceled lines with a last status less than status 980.

### 4.7.2 Prerequisites

Before you complete the task in this section:

1. Select the Cross Sell option in the Activate group box in the Sales Advisor Constants program.
2. Set up the document types to include.
   
   See [Setting Up Sales Advisor Included Document Types](#).
3. Select an option in the Search Criteria group box in the Sales Advisor Constants program.
4. Set the value in the Months Back field in the Cross Sell Time Frame group box in the Sales Advisor Constants program.
   
   See [Setting Up Sales Advisor Constants](#).
5. (Optional) Run the Order Advisor Workfile Purge program to clean up the workfile.
   
   See [Optional) Running the Order Advisor Workfile Purge Program](#).

### 4.7.3 Working with Cross Sell Items

To work with cross sell items:

1. Access the Enter New Order form or Manage Existing Order form.

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Form ID</th>
<th>Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter New Order</td>
<td>W42101D</td>
<td>Sales Order Processing (G4211).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Select Create Sales Order - Header First (P42101).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Click Save and Close on the Order Header Revisions form.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Select Create Sales Order - Detail First (P42101).</td>
</tr>
</tbody>
</table>
2. On the Enter New Order form or Manage Existing Order form, enter order header and detail information, as applicable.

   See “Entering Sales Order Header and Detail Information” in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.

3. Select the Order Advisor tab.

4. On the Order Advisor subform, review these fields for each opportunity:

   **Quantity**
   Enter the quantity of units to add to the sales order.

   **UOM (unit of measure)**
   Enter a UDC (00/UM) that indicates the quantity in which to express an inventory item, for example, CS (case) or BX (box).

   **Item Number**
   Displays a number that the system assigns to an item. It can be in short, long, or third item number format.

   **Item Description**
   Displays the description of the item.

   **Unit Price**
   Displays the price to be charged for one unit of this item. The unit price is expressed in the pricing unit of measure and includes adjustments.

   **Pricing UOM (pricing unit of measure)**
   Displays a UDC (00/UM) that indicates the unit of measure in which you usually price the item.

   **Unit Cost**
   Displays the amount per unit, derived by dividing the total cost by the unit quantity.

   **% Profit Margin (percent profit margin)**
   Displays the profit margin for the suggested item.

   The system hides the % Profit Margin field if you set the Display or Hide Cost Fields or Display or Hide Price Fields processing options to 2.

   The formula for calculating the percent profit margin is \(((\text{Price} - \text{Cost}) / \text{Price}) \times 100\).

   **Qty Available (quantity available)**
   Displays a number that indicates the quantity that is available.

   For example, the available quantity might consist of the on-hand quantity minus commitments, reservations, and backorders.
Availability is user defined. You can set up availability in the Branch/Plant Constants program (P41001).

**Branch/Plant**
Displays an alphanumeric code that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.

The value represents the detail branch/plant associated with the frequency and cross sell item opportunities.

**Type**
Displays the type of order level opportunity. This is how the system generated the opportunity. Values are:

- **Frequent**: The opportunity is a frequency item.
- **Cross Sell**: The opportunity is a cross sell item.

5. Enter a quantity and UOM for a cross sell item in the Order Advisor subform.
You can select more than one item to add to the sales order.

6. Click the Add to Order button.
The system adds each cross sell item as a new line on the sales order.

7. Review and select cross sell item opportunities, as applicable.

8. Complete the sales order, as applicable.

### 4.8 Working with Order Up-Sell

This section provides an overview of order up-sell, lists prerequisites, and discusses how to:

- (Optional) Run the Order Up-Sell Work Files Purge program.
- Work with order reprice for all items.
- Work with order reprice groups.

### 4.8.1 Understanding Order Up-Sell

You use the Order Up-Sell program (P42X30) to review both order level and simple basket adjustments that the current sales order qualifies for and additional sales opportunities. You review order information and requirements to receive additional order level or simple basket adjustments. Examples include free shipping based on weight or order total, and promotional packaged deals.

The system supports order up-sell when Advanced Pricing is ON.

The system supports the following for order up-sell:

- Kits with pricing methods 1, 2, and 3.
- Configured items with pricing methods 1, 2, and 3.
- Adjustment detail basis codes 1, 2, 5, and 6.
- Type 1 free goods only.

The system does not support order level up-sell for kits and configured items with pricing method 4, credit orders created from credit memo, or enhanced baskets. The system does not support credit orders created from a credit memo as the existing order
and basket repricing process does not include those order lines. If the credit order is keyed in as a line in the Sales Order Detail grid, then the system includes the line in order and basket repricing, and the order up-sell functionality.

### 4.8.1.1 Order Reprice Adjustment for All Items
An adjustment is a set of information that describes a pricing plan or promotion. You specify the level at which the system calculates price adjustments.

For an order level adjustment, the system calculates the adjustment based on information accumulated from items on the sales order detail lines you identified as an order pricing group.

You can set up an order level adjustment for all items on a sales order to have the system accumulate totals for all items on the sales order regardless of the reprice group, and compares the totals to the appropriate level breaks for the order reprice adjustment.

See “Order Reprice Adjustment for All Items” in the *JD Edwards EnterpriseOne Applications Advanced Pricing Implementation Guide*.

### 4.8.1.2 Tolerance for Up-Sell Opportunities
For the system to determine how to display order up-sell item opportunities, you enter a value in the Tolerance (%) field in the Order Up-Sell group box in the Sales Advisor Constants program (P42X00). The system uses the tolerance percentage to define whether up-sell item opportunities such as adjustment level breaks are inside or outside the tolerance range in the Order Up-Sell program. Opportunities within tolerance are realistic for a CSR to recommend to the customer in relation to what the customer is already ordering.

You set up the tolerance in the Sales Advisor Constants program.

See “Setting Up Sales Advisor Constants”.

The all items amount and weight charts on the Order Up-Sell form display all opportunities inside the tolerance range and only one opportunity outside the tolerance limit.

The system calculates the tolerance range for each adjustment name in the reprice group and each all items order reprice adjustment based on the reprice group total and adjustment level break value.

Tolerance range = Group Total + (Group Total * Tolerance).

Level breaks less than or equal to the tolerance range and greater than the group total are considered within tolerance. Level breaks greater than the tolerance range are considered outside the tolerance.

For example, the value in the Tolerance (%) field is set to 50 percent. A sales order has a total of 100 EA items in a basket group. Simple basket adjustments set up for this basket group have level breaks at 90 EA, 110 EA, 130 EA, 150 EA, 170 EA, 190 EA, and 250 EA.

The sales order qualifies for the 90 EA level break. The tolerance range is 100 + (100 * .5) = 150 EA. Level breaks 110 EA, 130 EA and 150 EA are within the tolerance range. Level breaks 170 EA, 190 EA, and 250 EA are outside the tolerance range.

### 4.8.1.3 How the System Determines the Opportunities
The system determines the additions to suggest for an order by evaluating all order level and simple basket level adjustments in the pricing schedule on the sales order.
The system checks the order and basket adjustment level breaks for higher breaks than currently ordered with better discounts.

The system considers an adjustment level break as an opportunity only if it is a discount adjustment which has a negative adjustment value that decreases the order price. If the level break is not a discount adjustment, for example, it adds a positive markup value to the price, then the system does not consider it as an opportunity even if it will apply free goods to the order.

The system considers level breaks with better discounts than what currently applies as opportunities if the level break and adjustment that currently apply are the same type of adjustments and the system can determine which adjustment is better. For example, both adjustments apply discounts of a percentage of the current net price to the order, one is 15 percent and the other is 10 percent. The system determines that the first adjustment has better discounts by comparing the percentage values without using a complex and costly process.

If the level break and adjustment that currently apply are different types of adjustments, for example, one applies a discount of a percentage of current net price and the other one applies a fixed value of discount, then the system cannot determine which one has the better discount without using a complex and costly process. The system considers the level break as an opportunity if the level break is a discount adjustment that has a negative adjustment value.

4.8.1.4 Order Up-Sell
You must use the Sales Order Entry program (P42101) to access the order up-sell item opportunities on sales orders. You click the Order Up-Sell link on the Order Advisor tab or select the Order Up-Sell option in the Go To drop down list to access the Order Up-Sell form (W42X30A).

The system displays order up-sell item opportunities in the Order Up-Sell form which includes the following subforms:

- Order Up-Sell All Items Amount Chart (S42X301A)
- Order Up-Sell All Items Weight Chart (S42X302A)
- Discounts by Reprice Group (S42X30B)
- Items in Reprice Group - reprice group name (S42X30D)

The charts in the Totals by Order and fields in the Totals by Reprice Group group boxes contain icons for adjustment information. The system uses the following icons:

- Blue diamond: Current order total.
- Green circle: Qualifying break. Displays the adjustment the order currently qualifies for and will be applied to the order, based on the current order total.
- Yellow inverted triangle: Break within tolerance. Displays the level break within tolerance.
- Red square: Displays the level break outside tolerance.

The Order Up-Sell feature uses the accumulation unit of measure for quantity and weight adjustments. The system converts the quantity and weight of each reprice group to the group’s accumulation unit of measure. For amount adjustments, the Order Up-Sell feature uses the amount in the order’s customer currency in currency mode.

Order up-sell uses the following tables:

- Preference Hierarchy File (F40073).
■ Price Adjustment Type (F4071).
■ Price Adjustment Detail (F4072).
■ Free Goods Master File (F4073).
■ Group Code Key Definition Table (F4092).
■ Item Key ID Master File (F40941).
■ Customer Key ID Master File (F40942).
■ Item Branch File (F4102).
■ Sales Order Detail File (F4211).

The system stores the order up-sell item opportunities in the following tables:
■ Order Upsell Item Group Totals Work File (F42X040W).
■ Order Upsell Item Group Opportunities WF (F42X041W).
■ Order Level Upsell Candidate Items (F42X050W).

4.8.1.5 Totals by Order
The Totals by Order group box contains order level adjustment information for the all items order reprice adjustment. An all items order reprice adjustment is not associated with any order reprice group and applies to all items on a sales order. This is a true order level discount.

The Totals by Order group box contains the Order Up-Sell All Items Amount Chart (S42X301A) and Order Up-Sell All Items Weight Chart (S42X302A) subforms which display charts and related fields for amount and weight breaks.

The system displays only one amount and one weight adjustment type on the Order Up-Sell form. The system displays the first adjustment in the schedule sequence for each adjustment type. The system applies all adjustments set up in the schedule.

Order up-sell supports the following basis codes from UDC 40/BC:
■ 1: Percent of Base Price
■ 2: Percent of Current Net Price
■ 5: Add on Amount
■ 6: Add on Variable Amount

The Order Upsell All Items Amount Chart program (P42X301) displays what currently qualifies and what might qualify for an all items order reprice adjustment for the amount level break type.

The Order Up-Sell All Items Amount Chart subform displays the Order Amount, Current Discount, Next Break, and Next Discount fields; and the Amount Break chart. The Currency Code fields display for discounts if the basis code is 5 or 6. The Amount Break chart plots the level breaks with the corresponding currency code label on the y-axis versus the discount factor for the corresponding basis code label on the x-axis.

For basis codes 1 and 2, the label for the x-axis is the string Discount - concatenated to the basis code description. For basis codes 5 and 6, the label for the x-axis is the string Discount - concatenated to the term Amount.

The Order Upsell All Items Weight Chart program (P42X302) displays what currently qualifies and what might qualify for an all items order reprice adjustment for the weight level break type.
The Order Up-Sell All Items Weight Chart subform displays the Order Weight, Current Discount, Next Break, Next Discount, and Weight Unit of Measure fields; and the Weight Break chart. The Currency Code fields display for discounts if the basis code is 5 or 6. The Weight Break chart plots the level breaks with the corresponding weight unit of measure label on the y-axis versus discount factor values on the x-axis. The label for the x-axis is the string Discount - concatenated to the basis code description.

The system uses the adjustment name description from UDC 40/TY as the chart title.

Each adjustment also gives an indication that free goods exist and indicates at which level break the free good qualifies. For example, Free Goods exist for 50.00, 100.00, 150.00 USD.

You hover over the icon on the chart to review specific data for each available adjustment.

If no all items order reprice adjustment exists, then the system collapses the Totals by Order group box.

4.8.1.6 Totals by Reprice Group

The Totals by Reprice Group group box displays the value of the order reprice group and simple basket group information. Order up-sell supports simple baskets and order level adjustments.

Reprice groups identify reprice categories for items with common repricing characteristics. You can assign items to order reprice groups and basket reprice groups in the Item Branch/Plant Revisions program.

The Totals by Reprice Group group box displays the following information for the group selected in the Discounts by Reprice Group subform:

- Reprice group code as defined in UDC 40/PI (Item Reprice Groups).
- Item reprice group description.
- Accumulated sales amount.
- Currency code associated with the total sales amount (in customer currency).
- Accumulated weight.
- Accumulation weight unit of measure.
- Accumulated total quantity of goods sold.
- Accumulation unit of measure for the quantity of goods sold.

If no order reprice adjustments exist in the Totals by Reprice Group group box, then the system collapses the Discounts by Reprice Group and Items in Reprice Group subforms.

4.8.1.7 Discounts by Reprice Group

The Discounts by Reprice Group subform displays the adjustment level breaks for all reprice groups in the order. The subform displays the level break that the current order qualifies for, all level breaks within tolerance, and one level break outside the tolerance.

The Qualifies field indicates whether the current sales order qualifies for an order reprice group discount and whether the opportunity is within or outside the tolerance. The system uses the following icons to identify opportunities:

- Green circle: Qualifying break. Displays the adjustment the order currently qualifies for and will be applied to the order, based on the current order total.
- Yellow inverted triangle: Break within tolerance. Displays the level break within tolerance.
- Red square: Displays the level break outside tolerance.

A green price tag icon in the F/G (free goods) field indicates that a free good is associated with the level break. When you click the green price tag, the system displays the Free Goods Revisions form (W4073A). You can review the free goods for the order, but you cannot make any changes on this form.

When you select a different group in the Discounts by Reprice Group subform, the system refreshes the fields in the Totals by Reprice Group group box with corresponding group information.

If you have not entered any quantities or units of measure in the Items in Reprice Group - reprice group name subform, then you can switch groups as much as you want in the Discounts by Reprice Group subform and the Items in Reprice Group - reprice group name subform refreshes.

If you enter a value in the Quantity Ordered field or UOM field in the Items in Reprice Group - reprice group name subform and you want to switch to another group in the Discounts by Reprice Group subform, then you will receive a confirmation message: *The item group selection has changed and quantities were entered for items. The system will refresh the Items in Reprice Group - reprice group name grid. Do you want to continue? You must select an action to continue.*

### 4.8.1.8 Items in Reprice Group - reprice group name

The Items in Reprice Group - reprice group name subform displays information for items that belong to the reprice group selected in the Discounts by Reprice Group subform.

The Items in Reprice Group - reprice group name subform displays all items that are setup in the group. If the system finds the item in the sales order branch/plant, then a line displays for that item and sales order branch/plant. If the item is not setup in the sales order branch/plant, then the system lists all branch/plants where the item exists.

For example, an order contains one line with item B and sales order branch/plant 30. The F4102 table contains the following records for a specific reprice group:

<table>
<thead>
<tr>
<th>Item</th>
<th>Branch/Plant</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>10</td>
</tr>
<tr>
<td>A</td>
<td>30</td>
</tr>
<tr>
<td>B</td>
<td>20</td>
</tr>
<tr>
<td>B</td>
<td>30</td>
</tr>
<tr>
<td>C</td>
<td>10</td>
</tr>
<tr>
<td>C</td>
<td>20</td>
</tr>
<tr>
<td>D</td>
<td>30</td>
</tr>
<tr>
<td>E</td>
<td>10</td>
</tr>
<tr>
<td>E</td>
<td>30</td>
</tr>
</tbody>
</table>

The Items in Reprice Group - reprice group name subform displays the following data:
<table>
<thead>
<tr>
<th>Item</th>
<th>Branch/Plant</th>
</tr>
</thead>
<tbody>
<tr>
<td>B</td>
<td>30</td>
</tr>
<tr>
<td>A</td>
<td>30</td>
</tr>
<tr>
<td>C</td>
<td>10</td>
</tr>
<tr>
<td>C</td>
<td>20</td>
</tr>
<tr>
<td>D</td>
<td>30</td>
</tr>
<tr>
<td>E</td>
<td>30</td>
</tr>
</tbody>
</table>

The Items in Reprice Group - reprice group name subform displays item B in branch/plant 30 first as the system always lists the items in the sales order first.

Although item A is not on the sales order, the system found item A in the sales order branch/plant 30. The system does not include item A in branch/plant 10.

Item C is not found in sales order branch/plant 30, so the system lists all branch/plants that contain item C - branch/plants 10 and 20.

The system populates availability and re-calculates extended price and extended weight when you change the quantity ordered or UOM for items on the sales order.

The system populates prices, unit weight, and availability for items that are not on the current order that represent sales opportunities when you click the row. The system populates extended price and weight when you enter a quantity or UOM. The system displays the price for a quantity of one item if you do not enter a value for order quantity.

When the Re-Price From Scratch processing option on the Process tab of the Order and Basket Level Pricing program (R42750) is set to a value of 1 (ON), the system does not populate the taxed prices in the initial load of the Items in Reprice Group - reprice group name subform.

If the system cannot convert the transaction or weight unit of measure for a line to the accumulation unit of measure, then the system changes the line to a quantity of one and the UOM field displays a warning in the initial load. If you enter a UOM and the conversion to the accumulation unit of measure is not set up in the standard UOM conversion table, then the system displays an error.

You enter the quantity and unit of measure for items that you want to add to the sales order.

**Caution:** The system adds all lines with a nonzero quantity to the sales order.

The system updates the Extended Price, Quantity Available, and Extended Weight fields. The Quantity Available field remains blank if the item has no availability; otherwise, the system displays the available quantity in the transaction unit of measure for the branch/plant in the grid line.

You click the Update Order button to add the items with updated quantity or unit of measure to the sales order. The system remains on the Order Up-Sell form and refreshes the charts and subforms with data related to the recent sales order updates. You can continue to make changes to the sales order from the Order Up-Sell form.
When you click Close on the Order Up-Sell form, the system updates the sales order with the changes you specified. The system updates the Sales Order Detail grid with a new detail line for the item if the item is not already on the current sales order.

If the item is on the current sales order, then the system updates the corresponding detail line in the sales order with the order quantity input value.

You can cancel a line on the sales order by entering a value of 0 (zero) in the Quantity Ordered field, tabbing out of the field, and clicking the Update Order button.

The system displays the quantity and unit of measure for kit and configured items in the Items in Reprice Group - reprice group name subform. However, the fields are display only. You must use the Sales Order Detail grid to make changes to kit and configured items on the sales order.

You click the Reset button in the Items in Reprice Group - reprice group name subform to refresh the grid with the original data. The system retains the original lines from the Sales Order Detail grid. If you changed lines for items that are not in the Sales Order Detail grid, then the system clears the quantity and UOM fields if a value is in the fields and retains the original unit of measure, pricing unit of measure, unit prices, and unit weight.

If you have not entered any quantities or units of measure in the Items in Reprice Group - reprice group name subform, then you can switch groups in the Discounts by Reprice Group subform and the Items in Reprice Group - reprice group name subform refreshes.

If you enter a value in the Quantity Ordered or UOM fields in the Items in Reprice Group - reprice group name subform and you want to switch to another group in the Discounts by Reprice Group subform, then you will receive a confirmation message: The item group selection has changed and quantities were entered for items. The system will refresh the Items in Reprice Group - reprice group name grid. Do you want to continue? You must select an action to continue.

### 4.8.2 Prerequisites

Before you complete the tasks in this section, you must:

1. Verify that Advanced Pricing is ON.
   

2. (Optional) Set the value in the Tolerance (%) field in the Order Up-Sell group box in the Sales Advisor Constants program.
   
   See *Setting Up Sales Advisor Constants*.

3. Verify adjustment and level break setup.
   
   See "Working with Schedules and Adjustments" in the *JD Edwards EnterpriseOne Applications Advanced Pricing Implementation Guide*.

### 4.8.3 (Optional) Running the Order Up-Sell Work Files Purge Program

From the Sales Advisor Workfile Purges menu (G42X312), select Order Up-Sell Workfiles Purge (F42X040W, F42X041W & F42X050W).

The system may not clean up work files properly if sales order processing ends abnormally or a browser is closed with an active order session open. To clean up any records that are no longer used, you must run the Order Up-Sell Work Files Purge program (R42X040WP) to delete all work file records that are more than one day old.
The Order Up-Sell Work Files Purge program purges records from the F42X040W, F42X041W, and F42X050W tables.

4.8.4 Working with Order Reprice Adjustment for All Items

To work with order reprice adjustment for all items:

1. Access the Enter New Order form or Manage Existing Order form.

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Form ID</th>
<th>Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter New Order</td>
<td>W42101D</td>
<td>Sales Order Processing (G4211).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Select Create Sales Order - Header First</td>
</tr>
<tr>
<td></td>
<td></td>
<td>🔄 Select Create Sales Order - Detail First</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Click Save and Close on the Order Header</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Revisions form.</td>
</tr>
<tr>
<td>Manage Existing</td>
<td>W42101C</td>
<td>Sales Order Processing (G4211).</td>
</tr>
<tr>
<td>Order</td>
<td></td>
<td>▪ Select Update Sales Order - Header First</td>
</tr>
<tr>
<td></td>
<td></td>
<td>🔄 Select Update Sales Order - Detail First</td>
</tr>
</tbody>
</table>

2. On the Enter New Order form or Manage Existing Order form, enter order header and detail information, as applicable.

See "Entering Sales Order Header and Detail Information" in the JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide.

3. Select Order Up-Sell in the Go To drop-down list and click the Go button.
   Alternatively, select the Order Advisor tab and click the Order Up-Sell link.

4. On the Order Up-Sell form, review the Totals by Order group box to identify the order level adjustments for the all items order reprice adjustment.
   The adjustment applies to all items on the sales order because no reprice group is defined in the adjustment detail setup.

5. Review the following fields in the Order Up-Sell All Items Amount Chart subform:

**Order Amount**
Displays the current total sales order amount.

**Current Discount**
Displays the current discount amount for which the current sales order qualifies and the system will apply to the sales order.

**Next Break**
Displays the sales amount that the order must reach to qualify for the next available sales discount.

**Next Discount**
Displays the discount amount that the sales order qualifies for if the next level break is met.
Currency Code
Displays a code that identifies the currency of the order amount and next break.

6. Review the chart on the Order Up-Sell All Items Amount Chart subform for the amount breaks.

The Order Upsell All Items Amount Chart chart displays what currently qualifies and what might qualify for an all items order reprice adjustment for the amount level break type.

The system uses the adjustment name description from UDC 40/TY as the chart title. The Amount Break chart plots the level breaks with the corresponding currency code label on the y-axis versus the discount factor for the corresponding basis code label on the x-axis.

The chart displays the current order total with a blue diamond icon, qualifying break with a green circle icon, breaks within tolerance with yellow inverted triangles, and one break outside of tolerance with a red square.

Each adjustment also gives an indication that free goods exist and indicates at which level break the free good qualifies.

Review the current order amount, current break that the order qualifies for, and opportunities within and outside the tolerance.

7. Review the following fields in the Order Up-Sell All Items Weight Chart subform:

Order Weight
Displays the total order weight in accumulation unit of measure.

Current Discount
Displays the current discount amount for which the current sales order qualifies and the system will apply to the sales order.

Next Break
Displays the sales weight that the order must reach to qualify for the next available sales discount.

Next Discount
Displays the discount amount that the sales order qualifies for if the next level break is met.

Weight Unit of Measure
Displays the accumulation weight unit of measure related to the total weight in the sales order for the specific order reprice group.

8. Review the chart on the Order Up-Sell All Items Weight Chart subform for the weight breaks.

The Order Up-Sell All Items Weight Chart chart displays what currently qualifies and what might qualify for an all items order reprice adjustment for the weight level break type.

The system uses the adjustment name description from UDC 40/TY as the chart title. The Weight Break chart plots the level breaks with the corresponding weight unit of measure label on the y-axis versus discount factor values on the x-axis. The label for the x-axis is the string Discount - concatenated to the basis code description.

The chart displays the current order total with a blue diamond icon, qualifying break with a green circle icon, breaks within tolerance with yellow inverted triangles, and one break outside of tolerance with a red square.
Each adjustment also gives an indication that free goods exist and indicates at which level break the free good qualifies.

Review the current order weight, current break that the order qualifies for, and opportunities within and outside the tolerance.

9. Review chart information in the Order Up-Sell All Items Amount Chart and Order Up-Sell All Items Weight Chart subforms.

You can work with items on the sales order in the Sales Order Entry program (P42101) to increase the amount or weight to reach the additional level break discounts.

**Note:** The Discounts by Reprice Group and Items in Reprice Group - *reprice group name* subforms may not appear on the Order Up-Sell form depending upon system setup. If the system displays these subforms, then changes made in the Items in Reprice Group - *reprice group name* subform directly impact the Discounts by Reprice Group subform and the charts.

10. Review and select item opportunities in the Discounts by Reprice Group and Items in Reprice Group - *reprice group name* subforms, as applicable.

11. Complete the sales order, as applicable.

### 4.8.5 Working with Order Reprice Groups

To work with order reprice groups:

1. Access the Enter New Order form or Manage Existing Order form.

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Form ID</th>
<th>Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter New Order</td>
<td>W42101D</td>
<td>Sales Order Processing (G4211).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>■ Select Create Sales Order - Header First (P42101).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>■ Select Create Sales Order - Detail First (P42101).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>■ Click Save and Close on the Order Header Revisions form.</td>
</tr>
<tr>
<td>Manage Existing</td>
<td>W42101C</td>
<td>Sales Order Processing (G4211).</td>
</tr>
<tr>
<td>Order</td>
<td></td>
<td>■ Select Update Sales Order - Header First (P42101).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>■ Select Update Sales Order - Detail First (P42101).</td>
</tr>
</tbody>
</table>

2. On the Enter New Order form or Manage Existing Order form, enter order header and detail information, as applicable.

See "Entering Sales Order Header and Detail Information" in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.

3. Select Order Up-Sell in the Go To drop-down list and click the Go button.

Alternatively, select the Order Advisor tab and click the Order Up-Sell link.
4. On the Order Up-Sell form, review these fields in the Totals by Reprice Group group box:

**Reprice Group**
Displays a value from the Item Price Groups UDC (40/PI) that identifies an inventory price group for an item.

**Amount**
Displays the total amount of goods that belong to the order reprice group in the sales order that contributes to the group discount.

**Currency Code**
Displays the currency code for the total amount of goods that belong to the order reprice group.

**Weight**
Displays the total weight of goods that belong to the order reprice group in the sales order that contribute to the group discount.

**Weight Unit of Measure**
Displays the accumulation unit of measure for the total weight of the reprice group.

**Quantity**
Displays the total quantity of goods that belong to the order reprice group in the sales order that contributes to the group discount.

**Unit of Measure**
Displays the accumulation unit of measure related to the total quantity in the sales order for the specific order reprice group.

5. Review these fields on the Discounts by Reprice Group subform:

**Qualifies**
Displays an icon that indicates whether a level break is qualified by this sales order, or if a potential opportunity for this order is within or outside the tolerance range. Values are:

- **Green Circle**: The level break is qualified by this sales order.
- **Inverted Yellow Triangle**: The level break is within the tolerance.
- **Red Square**: The level break is outside the tolerance.

**F/G (free goods)**
Displays a green price tag icon if a price adjustment is associated with any free goods. Selecting the icon takes you to the Free Goods Revisions program (P4073).

**Reprice Group**
Displays a value from the Item Price Groups UDC (40/PI) that identifies an inventory price group for an item.

**From Level**
Displays a number that specifies the value at which the system applies an adjustment. The value can be a quantity, weight, or amount, depending on how you defined the adjustment.

**UOM/Currency**
Displays a value that indicates:
- The unit of measure if the From Level is a quantity break.
- The weight unit of measure if the From Level is a weight break.
- The currency code if the From Level is an amount break.

**Reprice Group Discounts**
Displays a string that represents the qualifying or potential discount for an order or basket reprice group. The string contains the discount value, basis code description if basis code is 1 or 2 or currency code if the basis code is 5 or 6, and the adjustment name.

**Adjustment Level**
Displays the description from the Description 01 field in UDC 40/AL that specifies the level at which the system calculates price adjustments. Values are:

- Basket level: The system calculates the adjustment based on information accumulated from all sales order detail lines that you have identified as a basket pricing group. You define the basket reprice group on the Additional Information tab on the Item Branch Information form in the Item branch program (P41026).
- Order level: The system calculates the adjustment based on information accumulated from all the sales order detail lines you have identified as an order pricing group. You define the order reprice group on the Additional Information tab on the Item Branch Information form in the Item branch program.

**All Items Discounts**
Displays a string that represents the potential order up-sell discount for the whole sales order if the corresponding order reprice group break in the same grid line is reached.

The All Items Discounts field displays the discount value, basis code description if basis code is 1 or 2 or currency code if the basis code is 5 or 6, and the adjustment name for the all items reprice group opportunities if the order reprice group break is reached. The order reprice group break is in the Reprice Group Discounts column in the same grid line.

6. Select a reprice group on the Discounts by Reprice Group subform.
7. On the Items in Reprice Group - reprice group name subform, review these fields for items in the reprice group:

**Quantity Ordered**
Enter the quantity of units to add or update on the order.

For sales order lines, the system displays the quantity ordered on the order. The Quantity Ordered and UOM fields are the only fields that you can change or enter a value.

**UOM (unit of measure)**
Enter the unit of measure (UDC 00/UM) to add or update on the order.

For items in a sales order, the system displays the transaction unit of measure. For items that are not in the sales order, the system displays the primary unit of measure when you enter or click the row.

**Accumulation Quantity**
Displays the quantity ordered converted to the accumulation UOM for all items on the order.
**Accumulation UOM (accumulation unit of measure)**
Displays the unit of measure that the system uses to accumulate the quantity of items that belong to the reprice group in the sales order.

**Item Number**
Displays the unformatted item number (UITM).

**Description**
Displays the item description.

**Branch/Plant**
Displays the sales order branch/plant if the line is currently on the sales order or displays the branch/plant found in the Item Branch table if the item is not currently on the sales order.

**Unit Price**
Displays the price to be charged for one unit of this item. The unit price is expressed in the pricing unit of measure and includes adjustments.

**Extended Price**
Displays the quantity ordered multiplied by the unit price.

**Pricing UOM (pricing unit of measure)**
Displays a value from UDC 00/UM that indicates the unit of measure that the unit price is in.

**Quantity Available**
Displays a number that indicates the quantity that is available.

For example, the available quantity might consist of the on-hand quantity minus commitments, reservations, and backorders.

Availability is user defined. You can set up availability in the Branch/Plant Constants program (P41001).

**Unit Weight**
Displays the weight of one unit of the item in the reprice group.

**Extended Weight**
Displays the total weight of goods sold on which an adjustment is based.

**Weight UOM (weight unit of measure)**
Displays the unit of measure that the system uses to accumulate the quantity of items that belong to the reprice group in the sales order.

8. Enter quantity and unit of measure information for items in the Items in Reprice Group - reprice group name subform that belong to the reprice group selected in the Discounts by Reprice Group subform.

9. Click the Update Order button.

10. Review information in the Totals by Reprice Group group box and the Discounts by Reprice Group and Items in Reprice Group - reprice group name subforms.

11. Review and select item opportunities in the Discounts by Reprice Group and Items in Reprice Group - reprice group name subforms, as applicable.

12. Complete the sales order, as applicable.
Working With Order Profit Display

This chapter contains the following topic:
- Section 5.1, "Working with Order Profit Display"

5.1 Working with Order Profit Display

This section provides an overview of order profit display, lists prerequisites, and discusses how to:
- Work with the order profit display.
- Work with the Profit History chart.
- Work with the Current Order chart.

5.1.1 Understanding Order Profit Display

You use the Order Profit Display Sales Advisor feature to:
- Leverage existing profit margin information from the customer’s previous sales orders and display the data in charts during order capture.
- View the total order amount, total order cost, and the order profit margin in real-time while capturing the sales order.
- Retrieve data and display the Profit History chart, which shows how the current order compares to the customer’s previous orders.
- Evaluate the existing profit margin for each product on the sales order and dynamically create the Current Order chart.

The Order Profit Display Sales Advisor feature appears on the Order Profit tab at the sales order header level of the Sales Order Entry program (P42101). The P42101 program uses the Sales Order Profit Display Reusable Subform program (P421008) to display the Order Profit tab (S421008A).

You must define the document types to include in the order profit display before the system can process your data selection. If no document types are defined for the Order Profit Sales Advisor feature, the system issues a warning message when you access the Order Profit tab in Sales Order Entry (P42101). You use the Sales Advisor Included Document Types program (P42X001) to define the document types to include.

See Setting Up Sales Advisor Constants.

See Setting Up Sales Advisor Included Document Types.
Note: You must set the Display or Hide Cost Fields and Display or Hide Price Fields processing options on the Display tab of the Sales Order Entry program (P42101) to blank or 1 for the Order Profit tab to appear in sales order entry. If you set the Display or Hide Cost Fields or Display or Hide Price Fields processing options to 2, then the system does not display the Order Profit tab.

When you select the Order Profit tab, the system loads data in the tab by reading the header and detail cache for the order. The system searches the previous sales data stored in the Sales Order Header File (F4201) and Sales Order Header History File (F42019) tables. The Profit History chart uses the Total Order and Total Cost information, even if the result is a negative profit.

The Current Order chart uses only lines with a positive quantity. Orders with a negative quantity are considered a credit order and are not considered as profit.

The Current Order group box contains the Order Total, Total Cost, and Profit Margin fields on the Order Profit tab. The system calculates the value in the Profit Margin field using the following calculations:

\[
\text{Profit} = (\text{Total Order Price} - \text{Total Order Cost})
\]

\[
\text{Profit Margin} = \frac{\text{Profit}}{\text{Total Order Price}}
\]

\[
\text{Percent Profit} = \left(\frac{\text{Profit}}{\text{Total Order Price}}\right) \times 100 \quad \text{OR} \quad \left(\frac{\text{Total Order Price} - \text{Total Order Cost}}{\text{Total Order Price}}\right) \times 100
\]

If the currency is set to foreign in the header of the order, then the Order Profit tab displays the Foreign Order Total, Foreign Total Cost, and Profit Margin fields. The Foreign Order Total and Foreign Total Cost fields are display only. The Foreign Order Total and Foreign Total Cost fields are not used in the calculation of the profit.

The Profit History group box contains the From Date, Orders Displayed, and Profit Margin Average fields on the Order Profit tab.

The system displays the Profit History and Current Order charts on the Order Profit tab. The system updates the charts when you click the Refresh button.

You can use the Refresh button to update the information on the Order Profit tab so that data reflects what you add or change in the Sales Order Detail grid.

5.1.1.1 Profit History Chart

The Profit History chart displays the profit margin for the customer’s previous orders in a line chart. The line chart plots profit margin on the y-axis versus sales orders on the x-axis.

The system creates a chart of customer sales orders based on the following criteria:

- Sold To customer on the current sales order.
- Order type selection defined in the Sales Advisor Included Document Types program (P42X001).
- Number of sales orders to display defined in the Sales Advisor Constants program (P42X00).
- Number of days in the date range defined in the Sales Advisor Constants program.

See Setting Up Sales Advisor Constants.
The system uses the From Date field to specify the start date for previous data in the Profit History chart. When you first access the Order Profit tab, the system uses the value from the Days for Historical Range field in the Sales Advisor Constants program in the From Date field. If no value is entered in the Days for Historical Range field, then the system enters a default date in the From Date field in the Profit History group box. The default value is 90 days.

The system indicates the number of orders displayed in the chart in the Orders Displayed field in the Profit History group box. You can define the number of orders to display in the No. of Orders to Display field in the Sales Advisor Constants program. The system can display a maximum of 150 orders on the chart.

The system calculates and displays the average profit margin of all previous sales orders in the Profit Margin Average field.

The solid blue line on the chart represents the profit on previous sales orders, the dotted green line represents the current order profit, and the dashed red line represents the previous average.

The system does not render negative order quantities for sales order detail lines on the chart. The system considers negative order quantities as a credit order or credit line and does not include a credit order in the profit calculation.

The system requires multiple sales order records to display the Profit History chart on the Order Profit tab.

### 5.1.1.2 Current Order Chart

The Current Order chart displays the profit margin for each line on the current sales order in a bar chart format. The bar chart plots profit margin on the y-axis versus line number on the x-axis.

The Current Order chart displays both positive and negative values.

The following data is not included in the Current Order chart:

- Credit orders.
- Kit component items.
- Configured components.
- Sales order detail lines with negative order quantities (credit line).
- Canceled lines.

The system does not use foreign amounts to determine the percent profit. The foreign amounts are for display only.

You can click a bar in the Current Order chart to access the specific sales order detail lines. When you hover over a bar in the chart, the icon changes to a pointer and displays the value of the bar. When you click the bar in the chart, the system highlights the sales order line in the Sales Order Detail grid that is associated with the bar in the chart.

If no supported data exists on the sales order lines, then the system does not display the Current Order Chart.

### 5.1.2 Prerequisites

Before you complete the tasks in this section:

- Enter a number in the No. of Orders to Display field in the Sales Advisor Constants program.
■ Enter a number in the Days for Historical Range field in the Sales Advisor Constants program.

■ Define the document types to include in the order profit display using the Sales Advisor Included Document Types program (P42X001).

See Setting Up Sales Advisor Constants.

See Setting Up Sales Advisor Included Document Types.

■ Set the Display or Hide Cost Fields and Display or Hide Price Fields processing options on the Display tab of the Sales Order Entry program (P42101) to blank or 1 so that the Order Profit tab appears during sales order entry.

Note: If you set the Display or Hide Cost Fields or Display or Hide Price Fields processing options to 2, then the Order Profit tab does not appear.

See "Setting Processing Options for the Sales Order Entry Program (P42101)" in the JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide.

5.1.3 Working with the Order Profit Display

To work with order profit display:

1. Access the Enter New Order form or Manage Existing Order form.

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<thead>
<tr>
<th>Form Name</th>
<th>Form ID</th>
<th>Navigation</th>
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<tr>
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<tr>
<td></td>
<td></td>
<td>■ Select Create Sales Order - Header First (P42101).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>■ Click Save and Close on the Order Header Revisions form.</td>
</tr>
<tr>
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<td>W42101C</td>
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</tr>
<tr>
<td></td>
<td></td>
<td>■ Select Create Sales Order - Detail First (P42101).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>■ Select Update Sales Order - Header First (P42101).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>■ Select Update Sales Order - Detail First (P42101).</td>
</tr>
</tbody>
</table>

2. On the Enter New Order form or Manage Existing Order form, enter order header and detail information, as applicable.

See "Entering Sales Order Header and Detail Information" in the JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide.

3. Select the Order Profit tab.
4. Review the following fields in the Current Order group box:

**Order Total**
Displays the total value of all lines on the order that have not been shipped and billed to the customer.

**Total Cost**
Displays the total cost of all lines on the order that are not negative in quantity.

**Profit Margin**
Displays the total projected profit to be realized from fulfilling the order.
See **Understanding Order Profit Display**.

5. Review the fields and charts on the form.
See **Working with the Profit History Chart**.
See **Working with the Current Order Chart**.

6. Enter additional detail lines for the sales order, as applicable.

7. Click the Refresh button.

8. Review the fields and charts on the form.

9. Complete the sales order, as applicable.

### 5.1.4 Working with the Profit History Chart

To work with the Profit History chart:

1. Access the Enter New Order form or Manage Existing Order form.

<table>
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<tr>
<th>Form Name</th>
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</tr>
<tr>
<td></td>
<td></td>
<td>• Select Update Sales Order - Detail First (P42101).</td>
</tr>
</tbody>
</table>
2. On the Enter New Order form or Manage Existing Order form, enter order header and detail information, as applicable. See "Entering Sales Order Header and Detail Information" in the *JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide*.

3. Select the Order Profit tab.

4. Review the Profit History chart.

   The line chart plots profit margin on the y-axis versus sales orders on the x-axis.

5. Enter a date in the From Date field in the Profit History group box.

   **From Date (previous sales from date)**
   Enter a date that indicates the beginning of a date range for which the system displays previous sales orders.

6. Click the Refresh button if you change the value in the From Date field.

   The Refresh button initiates the process to retrieve new data based on the new date.

7. Review the Profit History chart.

8. Review the value in the Orders Displayed field in the Profit History group box.

   **Orders Displayed**
   Represents the number of sales orders displayed on the Profit History chart.

   This value is defined in the Sales Advisor Constants program.

9. Review the value in the Profit Margin Average field in the Profit History group box.

   **Profit Margin Average**
   Displays a value that represents the average profit margin for the selected previous sales orders.

10. Complete the sales order, as applicable.

### 5.1.5 Working with the Current Order Chart

To work with the Current Order chart:

1. Access the Enter New Order form or Manage Existing Order form.

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</tr>
</tbody>
</table>
2. On the Enter New Order form or Manage Existing Order form, enter order header and detail information, as applicable.

   See "Entering Sales Order Header and Detail Information" in the JD Edwards EnterpriseOne Applications Sales Order Management Implementation Guide.

3. Select the Order Profit tab.

4. Review the Current Order chart.

   The bar chart plots profit margin on the y-axis versus line number on the x-axis.

5. Hover over a bar in the chart to review the profit margin value for a specific line on the sales order.

6. Click a bar in the chart to highlight the associated sales order line in the Sales Order Detail grid.

7. Enter additional detail lines for the sales order, as applicable.

8. Click the Refresh button.

9. Review the Current Order chart.

10. Complete the sales order, as applicable.
This chapter contains the following topics:

- Section 6.1, "Understanding Supply Monitor"
- Section 6.2, "Working with Supply Monitor for Sales Order Lines"
- Section 6.3, "Working with Supply Monitor for Sales Order Lines in Fulfillment Management"

### 6.1 Understanding Supply Monitor

Supply Monitor provides real-time access to inventory availability information during order entry. Chart views are available for each product on the sales order, as each one has its own demand and priority rank. Showing availability information during order entry gives customer service representatives visibility into the likelihood of the order being filled. Real-time insight into product availability and the potential to allocate inventory to sales order lines in regard to other sales demand enables proactive communication with customers to discuss the probably of product being shipped on time.

Supply Monitor works with the JD Edwards EnterpriseOne Fulfillment Management system to provide insight into the potential of allocating inventory to sales order lines in Fulfillment Management. Allocating inventory based on priority rank ensures that the highest priority orders are filled first, thus improving customer satisfaction.

### 6.2 Working with Supply Monitor for Sales Order Lines

This section provides an overview of supply monitor for sales order lines and discusses how to work with supply monitor for sales order lines.

#### 6.2.1 Understanding Supply Monitor for Sales Order Lines

The Supply/Demand Chart program (P42X050) enables you to constantly monitor sales orders and view real-time information concerning the allocation of inventory to sales order lines. You must use the Sales Order Entry program (P42101) for sales order entry to access the Supply Monitor - Supply/Demand form (W42X050A). From the Sales Order Entry program, you can access the Supply Monitor - Supply/Demand form by clicking the icon that appears in the Supply Monitor field of the sales order detail line that is not marked as in fulfillment.

The system displays graphical information such as quantity available, quantity ordered, and scheduled pick date. A snapshot view of this information enables
customer service representatives to communicate real-time information concerning the inventory available to allocate to the sales order line.

The information that you are viewing at the time of sales order entry or in update mode is a snapshot view of real-time item availability for the scheduled pick date.

The information is real time and changes based on new and revised transactions. For example, today you might have enough inventory to completely fill the order line, but the scheduled pick date is two weeks away. Because of additional transactions and new demands, five days before the scheduled pick date you may have only enough inventory to partially fill the order line.

In the case of a process failure, such as sales order processing ending abnormally or closing a browser with an active session open, the system may not clean up work files properly. You can run the Supply Monitor Chart Work File program (R42X060WP) to delete all work file records that are more than one day old. The Supply Monitor Chart Work File program purges records from the Supply Monitor Chart Work File table (F42X060W).

---

**Note:** The supply/demand information that the system displays is based on how you set up the processing options for the Supply and Demand Inquiry program (P4021) version that the Sales Order program executes.

---

### 6.2.2 Working With Supply Monitor for Sales Order Lines

To work with supply monitor for sales order lines:

1. Access the Enter New Order form.

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<tr>
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</tr>
<tr>
<td></td>
<td></td>
<td>On the Manage Existing Order form, click the Add button.</td>
</tr>
</tbody>
</table>

**Figure 6–1 Enter New Order form**

2. On the Enter New Order form, enter order header and detail information.
When you tab off the order line, the system displays a green, yellow, or red icon in the Supply Monitor field to indicate inventory availability:

- The green icon (circle) indicates that there is enough availability to allocate inventory for the entire order line.
- The yellow icon (inverted triangle) indicates that there is not enough inventory available to fill the entire order line. However, there is enough inventory to partially fill the order line.
- The red icon (square) indicates there is no inventory available to allocate to the order line.

The system does not display an icon in the Supply Monitor field under the following circumstances:

- The order line’s order type, line type, and next status are not in the Supply/Demand inclusion rules.
- The order line is a credit order.
- The order line is for a non-stock item.
- The order line is for an ETO parent item.
- The order line is for a configured parent item.
- The order line is for a kit parent item that does not generate a work order.
- The order line is for an item that is a process.
- The order line is for an item with a bulk stocking type and the Supply/Demand (P4021) processing options exclude bulk stocking type items.
- The order line has been released from the Fulfillment Management system.
- The order line is canceled.
- The order line is for a Global Order Promising item.
- Viewing the order line in change mode without modifying the line or selecting Evaluate Supply Monitor from the Row menu.

3. To display the Supply Monitor - Supply/Demand form, click the icon on a sales order line for which you want to see supply monitor information.

![Figure 6–2 Supply Monitor - Supply/Demand form](image-url)
The chart displays the range of scheduled pick dates along the x-axis and the range of available Quantity along the y-axis. The blue area represents the total available quantity on the specified scheduled pick dates.

A green triangle indicates that there is enough quantity available on the scheduled pick date to allocate inventory to your order line.

A red triangle indicates that there is not enough quantity available on the scheduled pick date to allocate inventory to your order line.

A yellow triangle indicates that the system can allocate inventory to the order line to partially fill it. The top point of the icon indicates the total partial quantity that the system can allocate to your order line.

**Note:** You use the Sales Advisor Constants program (P42X00) to specify the number of calendar days the system displays on either side of the scheduled pick date for the order line.

- **Item Number**
  Displays the item number from the sales order line.

- **Branch/Plant**
  Displays the branch/plant from the sales order line.

- **Unit of Measure**
  Displays the unit of measure from the sales order line.

- **Quantity Ordered**
  Displays the quantity ordered. This is the quantity ordered for the line item.

- **Display in Grid**
  Select this option to have the system hide the graph and display the information in a grid format.

4. Select the Display in Grid option.

---

**Figure 6–3  Supply Monitor - Supply/Demand form (Grid Format)**
**Quantity Available**  
Displays the quantity that is available to be picked on the specified scheduled pick date.

**Quantity Ordered**  
Displays the quantity from the order.

**Unit of Measure**  
Displays the unit of measure from the sales order line.

**Unit of Measure Description**  
Displays the unit of measure description.

**Scheduled Pick Date**  
Displays the date that the quantity is scheduled for picking.

5. After reviewing the order information, click the Save and Submit button.

6. On the Manage Existing Order form, inquire on your sales order.

7. To display the Edit Sales Order form, select an order line and click the Select button.

When you initially access the Edit Sales Order form, the form does not display icons in the Supply Monitor field.

**Figure 6–4  Edit Sales Order form**

8. Select the order lines for which you want to evaluate supply monitor.

9. Select Evaluate Supply Monitor from the More Row Actions menu and click the Go button.

The system displays the icons in the Supply Monitor field.
6.3 Working with Supply Monitor for Sales Order Lines in Fulfillment Management

This section provides an overview of supply monitor for sales order lines in Fulfillment Management, list prerequisites, and discusses how to work with supply monitor for sales order lines in Fulfillment Management.

6.3.1 Understanding Supply Monitor for Sales Order Lines in Fulfillment Management

The Fulfillment Chart program (P42X040) enables you to constantly monitor sales orders and view real-time information concerning the potential to allocate inventory to sales order lines in Fulfillment Management.

The system displays graphical information, such as priority ranking, quantity ordered, ranges of order scores, and the fulfillment potential for sales order lines in each fulfillment potential category: high, moderate, and low. A snapshot view of this information enables customer service representatives to communicate real-time information concerning the potential to allocate inventory to sales order lines in Fulfillment Management.

You must use the Sales Order Entry program (P42101) for sales order entry to access the Supply Monitor - Fulfillment Potential form (W42X040A). From the Sales Order Entry program, you can access the Supply Monitor - Fulfillment Potential form by clicking the icon that appears in the Supply Monitor field of a sales order detail line marked as in fulfillment.

The information that you are viewing at the time of sales order entry and in update mode is a snapshot view of what would occur should you run the Auto Fulfillment Processing program (R4277701) at that time.

The information is real time and changes based on new and revised transactions. For example, order lines that currently have a high potential of being fulfilled might have a moderate potential of being fulfilled two hours later.

In the case of a process failure, such as sales order processing ending abnormally or closing a browser with an active session open, the system may not clean up work files properly. You can run the Supply Monitor Chart Work File program (R42X060WP) to delete all work file records that are more than one day old. The Supply Monitor Chart...
Work File program purges records from the Supply Monitor Chart Work File table (F42X060W).

### 6.3.2 Prerequisites

Before you complete the task in this section:

- Activate the Fulfillment Management system.
  
  See "Activating the JD Edwards EnterpriseOne Fulfillment Management System" in the *JD Edwards EnterpriseOne Applications Fulfillment Management Implementation Guide*.
  
- Set up Fulfillment constants in the Sales Advisor Constants program (P42X00).
  
  See Setting Up Sales Advisor Constants.
  
- Set up Fulfillment Management features such as scoring, service level rules, and fulfillment rules.
  
  See "Scoring Order Detail Lines" in the *JD Edwards EnterpriseOne Applications Fulfillment Management Implementation Guide*.
  
  

### 6.3.3 Working with Supply Monitor for Sales Order Lines in Fulfillment Management

To work with supply monitor for sales order lines in Fulfillment Management:

1. Access the Enter New Order form.

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Form ID</th>
<th>Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter New Order</td>
<td>W42101D</td>
<td>Sales Order Processing (G4211).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Select Create Sales Order - Detail First.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>On the Manage Existing Order form, click the</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Add button.</td>
</tr>
</tbody>
</table>
2. On the Enter New Order form, enter order header and detail information.

For order lines that enter into the fulfillment management process, the system displays a check mark in the In Fulfillment field. After the order lines are released from fulfillment, the system does not display icons in the Supply Monitor field.

When you tab off the order line, the system displays a green, yellow, or red icon in the Supply Monitor field to indicate the real-time potential to allocate inventory to the order.

- The green icon (circle) indicates that the potential to allocate inventory to the order line is high.
- The yellow icon (inverted triangle) indicates that the potential to allocate inventory to the order line is moderate.

In the Sales Advisor Constants program, you can specify the tolerance percentage used during the fulfillment potential process. The tolerance percentage determines how much of the available inventory the system considers possibly available.

- The red icon (square) indicates that the potential to allocate inventory to the order line is low.

---

**Caution:** The functional design of the Supply Monitor application does not support the Fulfillment Management custom functions. If you are using a custom function for service level rules, the system may or may not render the icons and graphics. If the system does render icons and graphics, the information may or may not be accurate.

The circumstances in which the system does not display an icon in the Supply Monitor field include:

- The order line is in Fulfillment Management but is not eligible for processing through the Auto Fulfillment (R4277701) batch program. Examples include a kit parent or component, and order lines on hold.
- Viewing the order line in change mode without modifying the line or selecting Evaluate Supply Monitor from the Row menu.

**Note:** If you enter an invalid version of the Auto Fulfillment Processing program (R4277701) in the Sales Advisor Constants program and the Fulfillment Management system is activated, the system does not process Supply Monitor and does not display the Supply Monitor icon. Also, the system does not display an error message.

3. To display the Supply Monitor - Fulfillment Potential form, click the icon on a sales order line that you want to see supply monitor information.

![Figure 6–7 Supply Monitor - Fulfillment Potential form](image)

The chart displays the available quantity on the y-axis and score ranges on the x-axis. Additionally, the chart displays a maximum of 10 score ranges in a bar graph. Each bar in the graph represents the amount of quantity ordered that falls within the score range. The quantity represented by each bar combines to equal the total quantity for all order lines for the specified item. The colors on the bars represent the potential to fill your order quantity and the quantity for other orders lines. The ranges are based on scoring setup and the number of sales orders that the system is considering at the moment. If you do not set up the system to score order lines, the system displays icons and graphics based on a zero score.

The chart also displays a legend to describe the potential to fill your order line quantity in relation to the potential to fill other quantities for the same item. For example, in Figure 6-7, the bar with the score range 7.2 - 0 indicates the following information:

- The total quantity ordered for order lines with item ADV003 in this scoring range is approximately 200.
- The red shaded area of the bar represents your order quantity (50) and indicates that the potential to allocate inventory to your order line is low.
- The light red shaded area of the bar represents the quantity (50) of a portion of the other order lines and indicates that the potential to allocate inventory to
this portion of other order lines is low.

- The yellow shaded area of the bar represents the quantity (100) of a portion of the other order lines and indicates that the potential to allocate inventory to this portion of other order lines is moderate.

As other transactions occur, such as an increase in inventory, canceled order lines, new order lines and so on, the potential to fill your order might change from low to moderate (yellow) or high (green).

---

**Note:** The lighter shades of red, yellow, and green represent quantities related to other order lines. Dark shades of red, yellow, and green represent quantities related to your order line.

---

**Item Number**
Displays the item number from the selected sales order line.

**Branch/Plant**
Displays the branch/plant from the selected sales order line.

**Unit of Measure**
Displays the unit of measure for the selected sales order line.

**Your Line Score**
Displays the line score for your selected sales order line. The system calculates a line score based on how you set up the JD Edwards EnterpriseOne Fulfillment Management system to score order lines.

See "Scoring Order Detail Lines" in the *JD Edwards EnterpriseOne Applications Fulfillment Management Implementation Guide*.

**Quantity Ordered**
Displays the quantity ordered. This is the quantity ordered for the line item.

**Total Availability**
Displays the amount of quantity available for the line item in the displayed branch/plant. The available quantity might consist of the on-hand quantity minus commitments, reservations, and backorders.

**Total Quantity Ordered**
Displays the total quantity ordered for the item across all sales orders.

**Display in Grid**
Select this option to have the system hide the graph and display the information in a grid format.


In grid format, the system displays 10 scoring ranges regardless of the number of bars in the bar graph. The ranges are based on scoring setup and the number of sales orders that the system is considering at the moment.

The system displays the total quantity of your sales order line across three columns - Your Quantity Fill High, Your Quantity Fill Moderate, and Your Quantity Fill Low. The system displays your quantities in the row that represents the scoring range for your line score.
Begin Score
Displays the beginning score range (ascending or descending) to define data on a point in the fulfillment graph represented as a number.

End Score
Displays the ending score range (ascending or descending) to define data on a point in the fulfillment graph represented as a number.

Your Quantity Fill High
Based on your line score, the system displays the current quantity of your sales order line that has a high potential to be filled.

Your Quantity Fill Moderate
Based on your line score, the system displays the current quantity of your sales order line that has a moderate potential to be filled.

Your Quantity Fill Low
Based on your line score, the system displays the current quantity of your sales order line that has a low potential to be filled.

Other Quantity Fill High
Based on the line scores of other sales order lines, the system displays the current total quantity of other sales order lines that have a high potential to be filled.

Other Quantity Fill Moderate
Based on the line scores of other sales order lines, the system displays the current total quantity of other sales order lines that have a moderate potential to be filled.

Other Quantity Fill Low
Based on the line scores of other sales order lines, the system displays the current total quantity of other sales order lines that have a low potential to be filled.

5. After reviewing the order information, click the Save and Submit button.

6. On the Manage Existing Order form, inquire on your sales order.

7. To display the Edit Sales Order form, select an order line and click the Select button.

When you initially access the Edit Sales Order form, the form does not display icons in the Supply Monitor field.

8. Select the order lines for which you want to evaluate supply monitor.

9. Select Evaluate Supply Monitor from the More Row Actions menu and click the Go button.

The system displays the icons in the Supply Monitor field.
Simulating Profit and Revenue

This chapter contains the following topics:

- Section 7.1, "Understanding Profit and Revenue Simulation"
- Section 7.2, "Working With the Profitability Simulator Program"

7.1 Understanding Profit and Revenue Simulation

Insight into revenue and profit drivers improves executive decision making for product pricing and reduces the risk of incorrect pricing. When sales executives can analyze "what if" scenarios, they gain visibility into factors that drive revenue and profit and make informed decisions on future pricing and sales. The variability of cost, price, and forecasts impact both profit and revenue. To analyze the impact of changes to these factors, executives must run multiple scenarios or simulations.

The JD Edwards EnterpriseOne In-Memory Sales Advisor solution provides real-time "what if" profit simulations. You can simulate changing cost and price conditions along with forecasted demand and sales history to view immediately the impact on revenue and profit. Analysis of "what if" scenarios using large volumes of data enables you to make quick and informed decisions. The Profitability Simulator program (P42X20) enables you to run and analyze simulations for a variety of changing conditions quickly without creating batch applications or custom reports. This eliminates the need to inquire on cost, price, and forecasts, export the data to a spreadsheet, and then create scenarios within the spreadsheet to determine how changes to these factors impact revenue and profit.

Profit and revenue simulation also enhances price management by providing you with the ability to simulate profit and revenue scenarios based on price and cost changes. You use the Profitability Simulator feature to:

- Analyze sales history and forecast demand to facilitate product pricing.
- Execute future price changes based on analysis.
- Enhance price negotiations.
- Improve customer relationships.
- Improve price management.

You can enter item and customer information along with price and cost information to simulate price, cost, profit margin, revenue, and profit.
7.2 Working With the Profitability Simulator Program

This section provides an overview of the Profitability Simulator program (P42X20) and discusses how to:

- Set processing options for the Profitability Simulator program (P42X20).
- Work with profit and revenue simulations.

7.2.1 Understanding the Profitability Simulator Program (P42X20)

The Profitability Simulator program (P42X20) enables you to view and compare profit and revenue scenarios for a specified period with graphic chart display. You can set processing options to specify:

- Whether the system displays or hides the charts.
- The order in which the system displays the charts.
- Whether the Profitability Simulator program opens in comparison mode or single mode.

Comparison mode is a vertical side-by-side format that enables you to compare two profit scenarios on the same form.

You can define the document types to display for past sales order information. Past sales information includes data stored in the Sales Order Detail File (F4211) and Sales Order History (F42119) tables.

The Profitability Simulator program displays charts that depict information related to price and cost comparison, profit margin, revenue, and profit. The system uses historical data stored in the Sales Order Detail (F4211) and Sales Order History Files (F42119) tables. For future quantities and price information, the system uses information stored in the Forecast File (F3460), Item Base Price File (F4106), and Item Cost File (F4105) tables. If you select the Use Advance Price option, the system uses the item price information stored in the Price Adjustment Details table (F4072).

Each chart displays its respective information based on the period type (weekly, monthly, quarterly, yearly) and the number of periods that you specify in the processing options on the Process tab. However, you can change the number of periods while using the Profitability Simulator form. You can set the Profitability Simulator program to display these charts:

- Cost vs. Price (line chart).

This line chart displays two lines that compare the item price to the item cost for the specified number of periods.

The x-axis is the date with increments based upon the number of periods. The y-axis is the currency amount. The currency is built into the chart title when you activate multicurrency processing.
Profit Margin (bar chart).
This bar chart displays a vertical bar for each period based on the number of periods that you specify. It compares the profit margin for each period to show you a view of historical and forecast trends based on the start date that you specify.

The x-axis is the date with increments based upon the number of periods. The y-axis is the profit margin percent.

Revenue (bar chart).
This bar chart displays a vertical bar for each period based on the number of periods that you specify. It compares the revenue for each period to show you a view of historical and forecast trends based on the start date that you specify.

The x-axis is the date with increments based upon the number of periods. The y-axis is the currency amount. The currency is built into the chart title when you activate multicurrency processing.
Working With the Profitability Simulator Program

**Figure 7–3  Sample: Revenue bar chart**

<table>
<thead>
<tr>
<th>Revenue (USD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>3,500</td>
</tr>
<tr>
<td>3,000</td>
</tr>
<tr>
<td>2,500</td>
</tr>
<tr>
<td>2,000</td>
</tr>
<tr>
<td>1,500</td>
</tr>
<tr>
<td>1,000</td>
</tr>
<tr>
<td>500</td>
</tr>
<tr>
<td>0</td>
</tr>
</tbody>
</table>

- **Profit (bar chart).**
  - This bar chart displays a vertical bar for each period based on the number of periods that you specify. It compares the profit for each period to show you a view of historical and forecast trends based on the start date that you specify.
  - The x-axis is the date with increments based upon the number of periods. The y-axis is the currency amount. The currency is built into the chart title when you activate multicurrency processing.

**Figure 7–4  Sample: Profit bar chart**

<table>
<thead>
<tr>
<th>Profit (USD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>3,500</td>
</tr>
<tr>
<td>3,000</td>
</tr>
<tr>
<td>2,500</td>
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<tr>
<td>2,000</td>
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<tr>
<td>1,500</td>
</tr>
<tr>
<td>1,000</td>
</tr>
<tr>
<td>500</td>
</tr>
<tr>
<td>0</td>
</tr>
</tbody>
</table>

The system displays the currency of the company that you indicate in the Company processing option. This processing option is on the Process tab of the Profitability Simulator program.

You can hover over any bar in the chart to display the actual value that is being depicted by the bar.

**7.2.1.1 Item and Customer**

When you run scenarios for the future, you must enter item, customer, and branch/plant information to retrieve future adjusted price information. To fetch historical price information, enter item information only and the system uses the actual information in the past. The item and customer criteria to enter for simulations include:

- **Item Number.**
  - The item can be in short, long, or third item number format.
■ Item Group.

This is a UDC (40/PI) that identifies an inventory price group for an item. Item price groups have unique pricing structures that direct the system to incorporate discounts or markups on items on sales orders. The discounts or markups are based on the quantity, dollar amount, or weight of the item ordered. When you assign a price group to an item, the item takes on the same pricing structure defined for the inventory price group.

**Note:** If you enter an item number and an item group on the Profitability Simulator form, the system simulates pricing based on the item group.

■ Customer.

This is a user-defined name or number that identifies an address book record. If you enter a value other than the address book number, such as the long address or tax ID, you must precede it with the special character that is defined in the Address Book Constants. When the system locates the record, it returns the address book number to the field.

■ Customer Group.

This is a UDC (40/PC) that identifies a customer group. Customer groups are an optional way of organizing pricing schemes. You can set up customer price groups to enter and update price information for multiple customers simultaneously. For example, you can create a customer price group for preferred customers, named PREFER, who purchase a bike for 420.00 USD, while other customers buy the bike for 450.00 USD.

A simple price group is a group of customers that are assigned to the same group name in the Customer Billing Instructions. In JD Edwards EnterpriseOne base pricing, a customer can belong to only one customer price group.

To allow for greater pricing flexibility, you can use the JD Edwards EnterpriseOne Advanced Pricing system to set up complex customer price groups. Complex price groups are groups of customers that are assigned to a group name but might be part of a different subgroup. You can define subgroups in a complex price group with values that you assign to category codes such as customer geographic location, line of business, or sales volume.


**Note:** If you enter a customer number and a customer group on the Profitability Simulator form, the system simulates pricing based on the customer group.

■ Branch/Plant.

Enter an alphanumeric code that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.

You must specify a branch/plant as part of your criteria. If you do not enter a branch/plant, you must enter cost and price information on the Price and Cost tab.
7.2.1.2 Price and Cost
You can enter item price and item cost information instead of pricing information in the system. The price and cost criteria to enter for simulations include:

- **Unit Cost.**
  
Enter a value the system uses to project a static cost for all future periods. If you leave this field blank, the system does not retrieve the cost for future periods.

- **Cost Factor (%).**
  
Enter a factor value that the system applies to the future cost for future periods. The system uses the factor value to adjust the cost value in the Unit Cost field above or the cost retrieved from the F4105 table. You can enter a positive or negative value. If you leave this field blank, the system does not apply a cost factor.

- **Unit Price.**
  
Enter a value the system uses to project a static price for all future periods. If you do not select the Use Advanced Price option, the system applies the factor in the Price Factor field. If you select the Use Advanced Price option, the system uses this value as the base price and applies price adjustments to it.

- **Price Factor (%).**
  
Enter a factor value that the system applies to the future price for future periods. The system uses the factor value to adjust the price value in the Unit Price field above or the price retrieved from the advanced price adjustment schedule, or the base price table (F4106). You can enter a positive or negative value. If you leave this field blank, the system does not apply a factor.

- **Forecast Factor (%).**
  
Enter a factor value that the system applies to the future forecast for future periods. The system uses the factor value to adjust the forecast quantity retrieved from the forecast. You can enter a positive or negative value. If you leave this field blank, the system does not apply a factor.

---

**Note:** If you do not input item, customer, and branch/plant information, the system issues an error message instructing you to enter the required variables or to input cost and price information.

---

7.2.2 Setting Processing Options for the Profitability Simulator Program (P42X20)

Use these processing options to specify company and forecast information that the system uses to process simulation information. These options also specify which charts the system shows or hides.

7.2.2.1 Process

1. **Company (Required)**

   Enter a company code that the system uses to determine the currency to display on all amount fields. The system retrieves the currency from the Company Constants table (F0010). If you are using line of business, this value restricts results to only customers who belong to this company. You must select a specific company. The value 00000 is not valid.
2. **Period Type (Required)**
Specify the amount of time between periods. You must enter a value between 1 and 4. Values are:

1: Weekly  
2: Monthly  
3: Quarterly  
4: Yearly

3. **Default Number of Periods**
Enter a numeric value that the system uses as the default value in the Periods field. You can change the value while you are using the application.

There is a limit to the number of periods you can use. The limit varies based on two factors: the chart types that the system displays and the amount of data that the chart displays. When the system exceeds the limit for one or both factors, the system displays an error message to indicate that the system has exceeded display limits.

If you leave this option blank, the system displays zero as the number of periods when you access the Profitability Simulator program. When you enter data and click the Simulate button, the system displays an error indicating that the number of periods is invalid. Therefore, you should enter a value greater than zero.

4. **Order Template**
You use the order template to get a standard quantity for an item/customer that the system uses to find a future price using advanced pricing. If you do not specify a template or the system does not find the item/customer for the specified template, the system uses a quantity of one to get a future price.

Select a value from the Order Template (40/OT) UDC table that the system uses for simulations. For this option to function, you must:

- Activate Advanced Pricing.
- Enter a valid order template for this processing option.
- Select the Use Advanced Price option when you work with the Profitability Simulator program.

If you select the Use Advanced Price option, the system validates the item, quantity, and customer found in the order template to calculate pricing for the profit simulation. The quantity is important because you can set up pricing based on quantity breaks.

The system does not display the Order Template form to allow edits. The system uses the order template default values only.

5. **Simulation Mode**
Specify whether the system opens the Profitability Simulator form in comparison or single mode. Values are:

Blank: Comparison mode; the system displays two scenarios to simulate in a side-by-side view with the criteria in a tab view.

1: Single mode; the system displays one scenario to simulate and expands the size of the form to display all criteria without any tabs.
7.2.2.2 Forecast

1. Forecast Type
Specify the forecast type that the system uses to simulate future periods. When simulating future periods, the system searches for data corresponding to this forecast type.

Leave this option blank if you do not want the system to simulate future periods or generate profit and revenue charts for future periods.

Note: When you activate this option, the remaining options on this tab are active. If you leave this option blank, the remaining options on this tab are inactive.

2. Date Period
Specify the period type the system uses when simulating future periods. The system uses this value to determine which period type to use from the Fiscal Date Pattern that you entered in the Fiscal Date Pattern processing option. This value must be equal to the one used when the forecast type was generated. Values are:

1: Weekly
2: Monthly

Note: This option is active when the Forecast Type option is activated.

3. Fiscal Date Pattern
Enter a code from the Date Pattern (H00/DP) UDC table to determine the period start and end dates for querying the forecast table.

Note: This option is active when the Forecast Type option is activated.

7.2.2.3 Chart Selection
Use these processing options to specify the sequence in which you want the system to display the charts. The system accepts numeric values and displays the charts based on sequence value. However, if you enter duplicate numeric values greater than zero for multiple charts, the system randomly displays only one of the charts. For example, if you enter 30 as the sequence value for the Profit Margin chart and Revenue chart, the system does not display both charts.

1. Cost vs. Price
Specify the sequence in which the system displays the Price vs. Cost chart in the simulation results.

Enter zero or leave blank to indicate that you do not want the system to display this chart in the simulation results.

2. Profit Margin
Specify the sequence in which the system displays the Profit Margin chart in the simulation results.
Enter zero or leave blank to indicate that you do not want the system to display this chart in the simulation results.

3. Revenue
Specify the sequence in which the system displays the Revenue chart in the simulation results.

Enter zero or leave blank to indicate that you do not want the system to display this chart in the simulation results.

4. Profit
Specify the sequence in which the system displays the Profit chart in the simulation results.

Enter zero or leave blank to indicate that you do not want the system to display this chart in the simulation results.

7.2.3 Working with Profit and Revenue Simulations
This section discusses how to:
- Simulate profit and revenue scenarios.
- Save profit and revenue simulations.
- Load and execute saved simulations.

7.2.3.1 Simulating Profit and Revenue Scenarios
To simulate profit and revenue scenarios:
1. Access the Profitability Simulator form.

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Form ID</th>
<th>Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profitability Simulator</td>
<td>W42X20A</td>
<td>Sales Advisor (G42X31) Select Profitability Simulator - Comparison Mode or select Profitability Simulator - Single Mode (P42X20).</td>
</tr>
</tbody>
</table>

![Profitability Simulator form]

If you specify in the processing options for the system to display the form in comparison mode, the system displays two scenarios to simulate in a side-by-side view with the criteria in a tab view.
You can collapse the Variables group box to hide the scenarios variables and display more chart information on your computer screen.

2. On the Profitability Simulator form, complete these fields for each scenario:

**Start Date**
Enter a date that the system uses to begin extracting simulation data. The date can be past or future.

**Months**
Specify the number of months to chart.
Item Number
Enter the item number for which to run the simulation. This is a required field; you must enter an item number.

Item Group
Enter a UDC value (40/PI) that identifies the item price group for which to run the simulation. The item group may be simple or complex. If you enter an item group, you must enter a representative item of that item group in the Item Number field. You must also enter a value in the Branch/Plant field.

For the system to calculate discounts and markups on the item, you must assign the item price group to the item.

Customer
Enter the customer number for which to run the simulation. If you leave this field blank, the system runs the simulation for all customers. You can also leave this field blank and enter a customer group for which to run the simulation.

Customer Group
Enter a UDC value (40/PC) that identifies the customer group for which to run the simulation. The group may be simple or complex. If you enter a complex group, you must enter a representative customer of that complex group in the customer field. You enter a representative customer so that the system recognizes the category codes associated with the complex group.

Branch Plant
Enter the branch/plant for which to run the simulation. If you leave this field blank, the system runs the simulation for all branch/plants within the specified company.

Unit Cost
Enter a value that the system uses to project a static cost for all future periods. If you leave this field blank, the system does not retrieve the cost for future periods.

Cost Factor (%)
Enter a factor value that the system applies to the future cost for future periods. The system uses the factor value to adjust the cost value in the Unit Cost field or the cost retrieved from the Item Cost File table (F4105). The value that you enter can be positive or negative. If you leave this field blank, the system does not apply a cost factor.

Unit Price
Enter a value that the system uses to project a static price for all future periods. If you do not select the Use Advanced Price option, the system applies the factor in the Price Factor field. If you select the Use Advanced Price option, the system uses this value as the base price and applies price adjustments to it.

Price Factor (%)
Enter a factor value that the system applies to the future price for future periods. The system uses the factor value to adjust the price value in the Unit Price field, or
the price retrieved from the advanced price adjustment schedule, or the Item Base Price File table (F4106). The value that you enter can be positive or negative. If you leave this field blank, the system does not apply a price factor.

**Forecast Factor (%)**
Enter a factor value that the system applies to the future forecast for future periods. The system uses the factor value to adjust the forecast quantity retrieved from the forecast. The value that you enter can be positive or negative. If you leave this field blank, the system does not apply a factor and uses the forecast values in the Forecast File table (F3460).

3. Click the Simulate button.

When you click the Simulate button, the system generates the charts. The system displays only those charts that you selected for display by setting the processing options on the Chart Selection tab for the Profitability Simulator program.

While simulating profit and revenue scenarios, you can click the Base Price Revisions link to access the Base Price Revisions program (P4106). After you access the Base Price Revisions program, you can update the base price of the item in your simulation.

To view the chart data for the profitability simulator, you can click one of the data points (either a bar in a bar chart or the points in the line chart) and the system displays the data in grid format.

You can click the Clear button to refresh the form and clear all data entry. When you use the program in comparison mode, each scenario has its own clear button. Thus, it only clears the associated scenario and not the entire form.

### 7.2.3.2 Saving Simulations

You can click the Save button to save the simulation scenarios based on the criteria you have entered.

To save a simulation scenario:

1. Access the Save Simulation form.

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Form ID</th>
<th>Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save Simulation</td>
<td>W42X20D</td>
<td>Sales Advisor (G42X31)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Select Profitability Simulator - Comparison Mode or select Profitability Simulator - Single Mode (P42X20).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>On the Profitability Simulator form, enter data for the scenarios.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Save button.</td>
</tr>
</tbody>
</table>

2. On the Save Simulation form, complete these fields:

**Profitability Simulation Name**
Enter a name for the simulation.

**Scenario Revision Level**
Specify the numbered revision for the simulation.

3. Click the OK button.
When you save simulation scenarios (single mode or comparison mode), the system stores the information in three tables:

- The Profitability Simulator Saved Scenarios table (F42X201) contains the filter field criteria that you saved for a given scenario.
- The Profitability Simulator Saved Charts table (F42X201B) contains the graphic information that represents the filter criteria that you saved for a given scenario.
- The Profitability Simulator Saved Data table (F42X201C) contains the data for saved simulation scenarios.

### 7.2.3.3 Loading and Executing Saved Simulations

After you save simulation scenarios, you can minimize repeating data entry by loading and executing the saved information.

To load and execute saved simulations:

1. Access the Work With Profitability Simulations form.

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Form ID</th>
<th>Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work With Profitability Simulations</td>
<td>W42X20F</td>
<td>Sales Advisor (G42X31).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Select Profitability Simulator - Comparison Mode or select Profitability Simulator - Single Mode (P42X20).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>On the Profitability Simulator form, select Select Scenario from the Form menu.</td>
</tr>
</tbody>
</table>

2. On the Work With Profitability Simulations form, select a record.

3. Select Load Scenario or select Execute Scenario from the Row menu.

   When you select Load Scenario, the system displays the Profitability Simulator form with data for the saved scenario and does not allow you to edit the fields and save your changes when you exit the form.

   When you select Execute Scenario, the system enables you to edit the criteria and create new charts. When you save the scenario, the system defaults to a new revision number to enable you to update the revision level so you do not inadvertently override the previously saved scenario.
This appendix contains the following topics:

- Section A.1, "Tables Used by JD Edwards EnterpriseOne In-Memory Sales Advisor Solution"

### A.1 Tables Used by JD Edwards EnterpriseOne In-Memory Sales Advisor Solution

This table lists the tables used by JD Edwards EnterpriseOne In-Memory Sales Advisor in alphanumeric order:

<table>
<thead>
<tr>
<th>Table</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Advisor Constants (F42X000)</td>
<td>Stores constants that you define to control the cross sell items, frequency items, order up-sell, order profit, and supply monitor features.</td>
</tr>
<tr>
<td>Sales Advisor Included Document Types</td>
<td>Contains the document types that the system includes in the associated sales advisor feature.</td>
</tr>
<tr>
<td>(F42X001)</td>
<td></td>
</tr>
<tr>
<td>Buying Frequency by Customer (F42X010)</td>
<td>Stores frequent items bought by customers by month/year from the Sales Order Detail File (F4211) and Sales Order History File (F42119) tables.</td>
</tr>
<tr>
<td>Line Advisor Work File (F42X010W)</td>
<td>Contains the information for line advisor up-sell and preferred items, such as units of measure, prices, costs, profit margin, quantity available, line numbers, and free goods.</td>
</tr>
<tr>
<td>Order Advisor Work File (F42X020W)</td>
<td>Contains the information for cross sell and frequently bought item suggestions from the Sales Order Detail File (F4211) and Sales Order History File (F42119) tables.</td>
</tr>
<tr>
<td>Order Upsell Item Group Totals Work File</td>
<td>Contains sales order quantity, weight, and amount totals by order reprice group.</td>
</tr>
<tr>
<td>(F42X040W)</td>
<td></td>
</tr>
<tr>
<td>Order Upsell Item Group Opportunities WF</td>
<td>Contains information for the current break and discount, and opportunities (adjustment breaks and discounts that may apply) for each order reprice group contained in the sales order.</td>
</tr>
<tr>
<td>(F42X041W)</td>
<td></td>
</tr>
<tr>
<td>Table</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Order Level Upsell Candidate Items (F42X050W)</td>
<td>Contains the items that belong to the sales order classified by order reprice group and items from the Item Branch File table (F4102) that belong to the same reprice group as the items in the sales order.</td>
</tr>
<tr>
<td>Supply Monitor Chart Work File (F42X060W)</td>
<td>Contains the data for the supply monitor, such as the icon color, availability, and demand.</td>
</tr>
<tr>
<td>Profitability Simulator Saved Scenarios (F42X201)</td>
<td>Contains the filter field criteria saved for a given scenario.</td>
</tr>
<tr>
<td>Profitability Simulator Saved Charts (F42X201B)</td>
<td>Contains the filter fields and values for saved profit scenarios.</td>
</tr>
<tr>
<td>Profitability Simulator Saved Data (F42X201C)</td>
<td>Contains the data for saved simulation scenarios.</td>
</tr>
</tbody>
</table>
Glossary

Customer Number and Customer

Enter a number that identifies an entry in JD Edwards EnterpriseOne Foundation - Address Book, such as employee, applicant, participant, customer, supplier, tenant, or location.

You can use this number to locate and enter information about the address book record. If you enter a value other than the address book number (AN8), such as the long address or tax ID, you must precede it with the special character that is defined in JD Edwards EnterpriseOne Foundation - Address Book constants. When the system locates the record, it returns the address book number to the field.

For example, if address book number 4100 (Total Solutions) has a long address TOTAL and an * distinguishes it from other entries (as defined in JD Edwards EnterpriseOne Foundation - Address Book constants), you could type *TOTAL into the field, and the system would return 4100.

Cust Price Group, Customer Price Grp, and Customer Group (customer price group)

Enter a value from UDC 40/PC to identify the pricing group associated with this customer or supplier.

For sales orders, you assign a pricing group to a customer on the Customer Billing Instructions form. Groups typically contain customers with common pricing characteristics, such as retailers, wholesalers, and so forth.

For purchase orders, you assign a pricing group to a supplier on the Supplier Billing Instructions form.

Effective Date, Effective From, and Eff Date From (effective date from)

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

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

The default date is the current system date. You can enter future effective dates to plan for upcoming changes.
Expiration Date, Effective Thru, and Eff Date Thru (effective date through)

Enter a date that indicates when the address, item, transaction, or record is no longer in effect. The meaning of this field differs, depending on the program. The default date is December 31 of the default year that is defined in the data dictionary for the Century Change Year field.

Item Number

Enter a number that identifies the item. The system provides three separate item numbers plus an extensive cross-reference capability to alternative item numbers. The three types of item numbers are:

- **Item Number (short)**
  An 8-digit, computer-assigned item number.

- **2nd Item Number**
  A 25-character, user-defined, alphanumeric item number.

- **3rd Item Number**
  Another 25-character, user-defined, alphanumeric item number.

In addition to these three basic item numbers, the system provides an extensive cross-reference search capability. You can define numerous cross-references to alternative part numbers. For example, you can define substitute item numbers, replacements, promotional items, bar codes, customer numbers, or supplier numbers.

Item Price Group, Item Price Grp, and Item Group

Enter a value from UDC 40/PI to identify an inventory price group for an item.

Inventory price groups have unique pricing structures that direct the system to incorporate discounts or markups on items on sales and purchase orders. The discounts or markups are based on the quantity, dollar amount, or weight of the item ordered. When you assign a price group to an item, the item takes on the same pricing structure defined for the inventory price group.

You must assign an inventory price group to the adjustment definition or the item, for the system to interactively calculate discounts and markups on sales orders and purchase orders based on an item group.

Last Status

Review the value from UDC 40/AT to determine the last step in the processing cycle that has been successfully completed for this order line.

Line Type and Ln Ty

Enter a code to control how the system processes lines on a transaction. This value controls transaction interfaces with the JD Edwards EnterpriseOne General Ledger system from Oracle, JD Edwards EnterpriseOne Job Cost system from Oracle, JD Edwards EnterpriseOne Accounts Payable system from Oracle, JD Edwards EnterpriseOne Accounts Receivable system from Oracle, and JD Edwards EnterpriseOne Inventory Management system from Oracle.

The line type also specifies the conditions under which a line prints on reports and is included in calculations. Some common codes are:

- **S**: Stock item.
- **J**: Job cost.
- **N**: Non-stock item.
- **F**: Freight.
- **T**: Text information.
- **M**: Miscellaneous charges and credits.
- **W**: Work order.

**Order Company**

Enter a number that, along with order number and order type, uniquely identifies an order document (such as a purchase order, a contract, a sales order, and so on).

If you use the Next Numbers by Company/Fiscal Year facility, the Automatic Next Numbers program (P0010) uses the order company to retrieve the correct next number for that company. If two or more order documents have the same order number and order type, the order company lets you locate the desired document.

If you use the regular Next Numbers facility, the system does not use the order company to assign a next number. In this case, you do not use the order company to locate the document.

**Order Date**

Review the field to determine the date that the order is entered into the system. This date determines which effective level the system uses for inventory pricing.

**Quantity Ordered**

Enter the number of units that the customer ordered.

**Reprice Group**

Displays a value from the Item Price Groups UDC (40/PI) that identifies an inventory price group for an item.

You assign items with common order repricing characteristics to an order repricing category on the Item/Branch Plant Info. form. You define different categories based on location. Order repricing is a technique that the system uses to:

- Accumulate items on an order that belong to a common repricing category during a batch or interactive program.
- Compare the aggregate quantity, weight, and amount of the items on the order to the appropriate quantity, weight, and amount breaks in the repricing category.

If the items qualify for an additional discount, that discount can be reflected as a change in unit and extended price for each qualifying item in the original order line. Or it can be reflected as a flat dollar amount in a new discount line, depending on the pricing adjustment (or advanced pricing) setup.

This functionality supplements the repricing function and operates in the same batch or interactive program.

**Ship To**

Enter the address number of the location to which you want to ship this order. The address book provides default values for customer address, including street, city, state, zip code, and country.

**Sold To**

Enter a number that identifies an entry in the JD Edwards EnterpriseOne Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or...
location. The sold to customer address identifies the customer entity to whom the goods are sold.

**UoM and UM (unit of measure)**

Enter a value from UDC 00/UM to specify the measurement used to define the quantity of an inventory item. For example, CS (case) or BX (box).

**Unit Price**

Review or enter the price to be charged for one unit of an item. If you do not set up base prices in the Item Base Price File table (F4106), you must manually enter the price on the sales order.