Implementing Oracle JDE ERP ORCHESTRATOR

Real Life Business Cases

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Thank the Divine in making my dreams come true.

Thanks to my parents.

“THE WHOLE LIFE IS A SUCCESSION OF DREAMS; MY AMBITION IS TO BE A CONSCIOUS DREAMER, THATS ALL.”

— **Swami Vivekananda**

Key words: Oracle, JDE, JD Edwards, UDO, User Defined Objects, ERP Orchestrator

Disclaimers

This book is about used cases on Oracle's JD Edwards Enterprise One ERP software tools, known as UDOs.

Oracle owns JDE software & copyrights.

No customer data is exposed since the book uses demo cycle making sample data.

This is to share the business requirements and helping the user community in building these without waiting for IT resources. Any super or power user can start making these UDOs and go to IT for deployments.

Clients need to take care of the licensing and other training needs.

Role Security is super critical while granting access to UDO objects. These should not be enabled with generic roles with complete read-only access since critical data can be exported by temporary or intern employees/contractors.

“We are visitors on this planet. We are here for one hundred years at the very most. During that period we must try to do something good, something useful, with our lives. if you contribute to other people's happiness, you will find the true meaning of life.”

— **Dalai Lama XIV**

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Foreword

You want to know more about Oracle’s JDE (JD Edwards Enterprise One) ERP (Enterprise Resource Planning) software UDO (User defined objects) objects. Every new or upgrade E1 (Enterprise One) project want to implement this functionality totally. But, project delays and budget limitations place UDOs into future phases and never gets done. In the meantime, end users are still working on stale reports and out of date data analytics.

You are a super user or have interest in knowing cross functional business scenarios. If you go to IT team, they lay out some templates but that needs constant changes. Some business users show interest in learning UDOs, but there is always constant chatter of material shortages in production and/or following up on open orders, vendor performance, data issues, management reporting, etc. You don’t have time to creatively think of software solutions. This book will help you to figure out a solution to make use of the ERP investment much more and make end users happy & productive!

The primary focus is on distribution and manufacturing applications. The concept can be extended to Financial applications

Role Security is super critical while granting access to UDO objects. These should not be enabled with generic roles with complete read-only access since critical data can be exported by temporary or intern employees/contractors.

'Nothing great in the world has ever been accomplished without passion' - Georg Hegel

Summary

Overview of the contents and applications/tables involved.

JDE ORCHESTRATOR SUMMARY SHEET			
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1	Distribution	Credit Cleared Alert	F4209
2		Order Backlog Alert	P42270
3		Orders Due Next 30 days	P42270
4		On hold Inventory Alert	P41280
5		Orders Delayed Past 30 days	P42270
6		Negative inventory Alert	P41271
7		Zero Price Items Alert	P41062
8		Zero Cost items alert	P41052
9		Customer Billing Instructions Changes	P03013
10		MRP items where Item Primary Supplier is blank Alert	P41026
11		Blanket Order Usage Alert	P4311
12		Purchase Order Overdue Alert	P4338
13		Purchase Order delayed Alert	P4338
14		Purchase Order Not Closed Age Analysis Alert	P4338
15		Supplier $ performance, discounts Alert	P042002
16		Item Usage Trace Inquiry Alert	P41273
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22		Work Order Scrap Quantity Surprises Alert	P31113
23		MRP PurOrd Messages B & O count Alert	P3411
24		MRP Workorder Messages B & O count Alert	P3411
25		MRP Items Messages display days less than leadtime	P3411
26		MRP PurOrd Messages PAST DUE count Alert	P3411
27		MRP WorkOrd Messages PAST DUE count	P3411
28		WO component issues qty surprises Alert	P48270
29		Work order exception status & age analysis Alert	P48013
30	Costing	Cost Ledger Surprises 08 vs 07 Alert	P41052
31		Cost Ledger Surprises 02 vs 07 Alert	P41052
32		Cost Ledger Surprises YTD vs Last Year Alert	P41052
33		Work order Engg threshold $ Alert	P48270
34		Work order Planned threshold $ Alert	P48270
35		Work order Actual threshold $ Alert	P48270
36		Work order Variance B cost type threshold $ Alert	P48270
37		Work order Variance C cost type threshold $ Alert	P48270

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39		Copying Item Branch from one to multiple branches	F4102
40		Retrieve customer credit limit- Data Request	V03012F
41		Retrieve Customer Order Value - Data Request	F4201
42		Place credit hold and send messages	P03013
43		Watchlist on datarequest: Safety stock threshold alert	V41021L
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45		Items below safestock orchestrator	V41021L
46		Reorder Point vs onhand Comparison	V41021L
47		Purchase Order: Creation, Print and Email PO	P4311
48		Sales Orders: Create, Print Acknowlegement and Email	P42101
49	CAFE1	CAFE1 MRP Review Composite	P3411
50		CAFE1 Workorder Composite	P48270
51		CAFE1 ItemBranch Composite	P41026
52		CAFE1 Sales Orders Composite	P42270
53		CAFE1 Purchasing Composite	P4338
54		CAFE1 Item UOM Composite	P41026
55		CAFE1 Onhand vs Safetystock	P41271
56	Personal Form	Personal Form Work Order Entry	P48013
57		Personal Form Purchase Order Entry	P4310
58		Personal Form Sales Order Entry	P4210
59		Personal Form Address Book Revisions	P03013
60	Grid Extension	Grid Extension: ItemBranch	P41026
61		Grid Extension: Customer Billing Instructions	P01013

TOP 5 BUSINESS CASES

Managers and Management wants improved automation and productivity

Finance wants faster return on the investments. And re-invest on emerging technology and tools.

Every company within the same industry is different. You get the concepts. Fine tune it to your specific requirements and needs.

1. For a small or medium organization with limited number of CSR staff, JDE can create sales orders, generate order acknowledgment, and send it to the customer. If the order line type is W, then a work order can be auto generated, parts-list/routing attached and ready for production planner to schedule the order. All these done within minutes. These orders can show up in respective watch-lists. A front-end application will be required to capture branch, item#, customer#, order qty and requested date. Orchestrator API will do the back-end work.

2. Organizations does not have large personnel in the procurement department. Either small time buys are delegated to individual departments or there are blanket orders in place with delivery schedules. All orders coming from MRP can be auto-generated and processed immediately. If you are not in MRP and need a system to automate PO Generation? Orchestrator can generate Purchase orders and send PO doc to vendors directly.

3. Watchlists does not have any additional rules setups. Orchestrator can merge watchlist to notifications to build the rules. Example: Items below safetystock point, workorder beyond certain days delays. Users can click on the link provided in the notification.

4. Simple low-volume integrations with third-party systems can be achieved with the orchestrator licenses you have purchased already

5. You can enable E1Pages to invoke orchestrator tools which has simple integrations to low cost BI tools.

TOP 10 IMPORTANT POINTS

Managers and Management wants improved automation and productivity

Finance wants faster return on the investments. And re-invest on emerging technology and tools.

Every company within the same industry is different. You get the concepts. Fine tune it to your specific requirements and needs.

10. Databrowser are powerful tool. If your organization does not allow databrowser to end users, you can still create watchlist on databrowser and use “notifications” to highlight the output. F4209 is an example where users can alert the moment the credit hold is cleared by Finance.

9. Watchlists can be standalone. Or combined into orchestrator as a part of another long process like sales order or purchase order transactions.

8. Form requests within orchestrator is needed to capture the JDE application and control fields. This can be easily automated by using ‘record a process’ within JDE web browser.

7. Data requests enable retrieve data points. Search for system built Views in the system instead of custom creating multiple table joins.

6. You can retrieve JDE submitted job output and sent to your email account.

5. Logic extensions are powerful to disable selected fields within an application/version (not ZJDE*) and also build custom fields to update values within a grid column. No need for application customization involving codes.

4. Message generation in-terms of sending email outputs and also show up workcenter can be made generic and made it as re-usable component. No end user is going to check work center messages. But if you provide JDE application links ensure customer/vendor are not copied in the email.

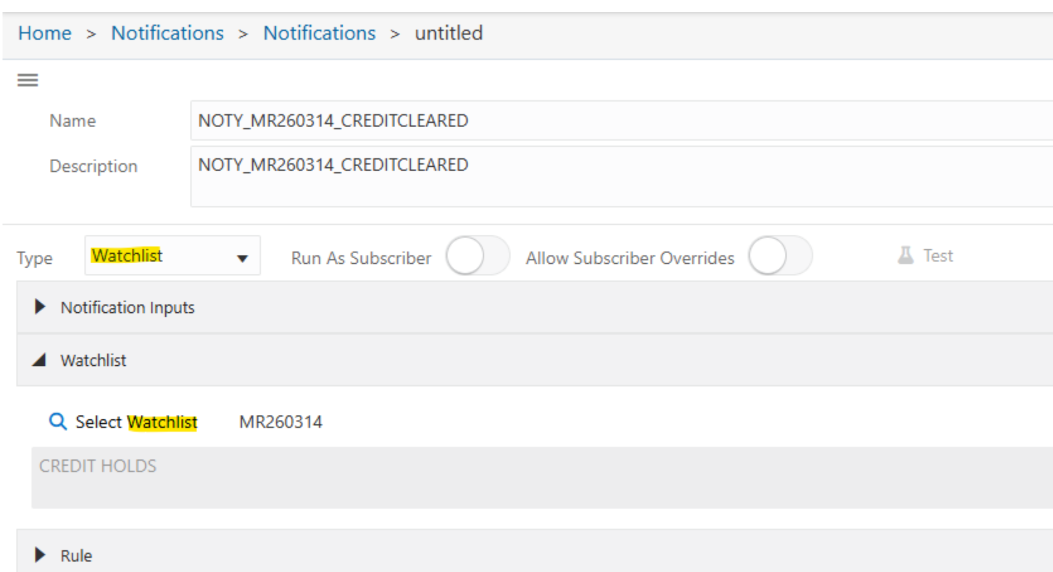
3. Rules make it easy to find a true or false condition and generate the next step in an orchestrator.

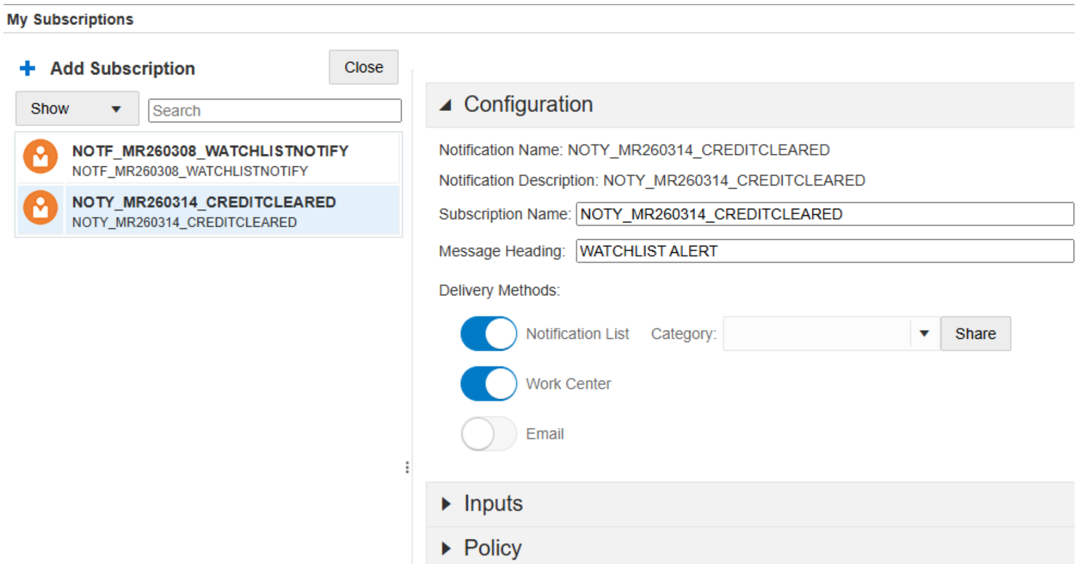
2. Attachments are very powerful. This could be used to update new terms and conditions on existing sales or purchase orders. Or could update media attachments to your finished goods at the branch level, consistently. Or media attachments to the bills or routing on certain conditions and rules. Saves users time spent and ensure compliance.

1. Small organization could be benefit immensely on using connectors on their third party system, instead of spending big budget on large scale back-end data integrations.

1. Credit Cleared Alert

Functional Area	Distribution
Number	1
Title	Credit Cleared Alert
Description	CSR needs to know the key customer's credit limits are cleared or updated. They can then release the hold and process the orders, instead of customers sending reminders
Purpose	Get alerts on important customers.
Contents	Using watch list with data browser application. In this example orchestrator notification is enabled, since many companies do not grant access to data browser to end users
	Orchestrator notification on this section. Creating watchlist is detailed on the next section

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Show
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Work Center
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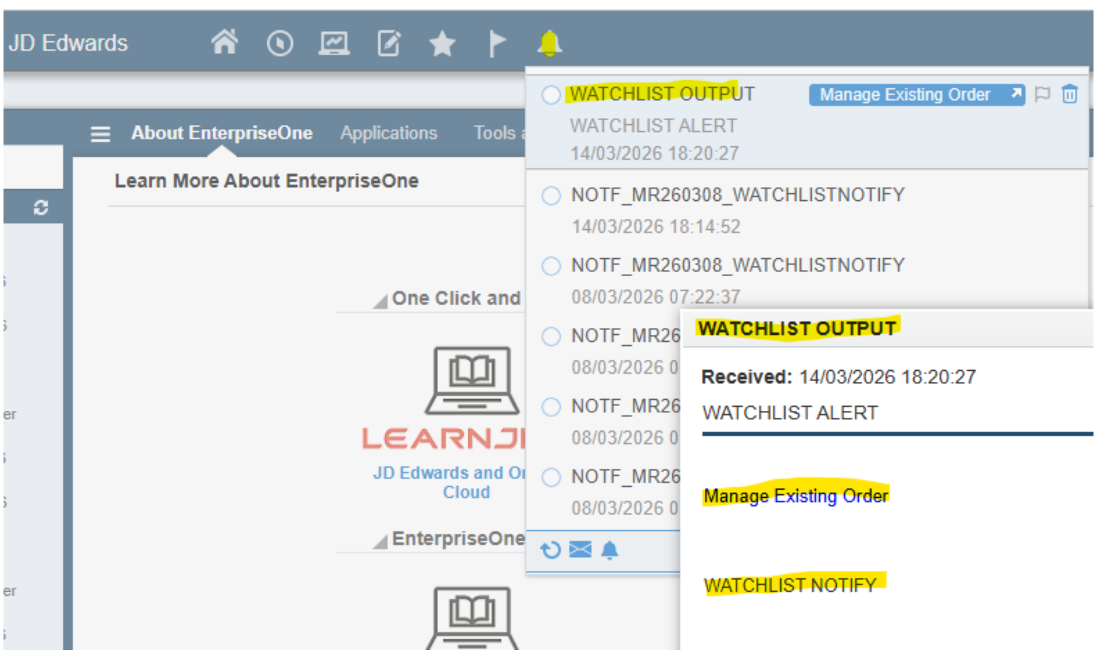
Inputs
Policy


JD Edwards
WATCHLIST OUTPUT
Manage Existing Order
WATCHLIST ALERT
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About EnterpriseOne
Applications
Learn More About EnterpriseOne
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14/03/2026 18:14:52
NOTF_MR260308_WATCHLISTNOTIFY
08/03/2026 07:22:37
One Click and
WATCHLIST OUTPUT
Received: 14/03/2026 18:20:27
WATCHLIST ALERT
Manage Existing Order
WATCHLIST NOTIFY

Credit Cleared Alert - Watchlist

Business Requirement:

Your customers go through credit checks. JDE puts credit holds automatically and/or some user defined manual codes. As Customer Service Representative, you clear orders to next steps for non-credit hold orders. You may not check periodically which orders got credit cleared. Sometimes, the customer calls back to inquire order status and then you go into scramble mode to make the products available for them. You may request Finance team to inform your team periodically, but that stops after one or two weeks.

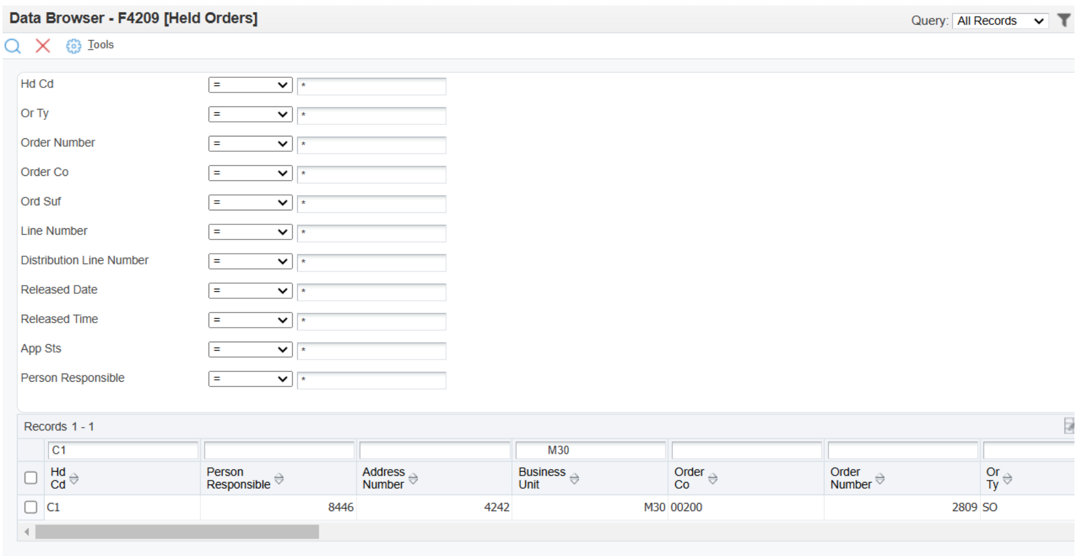
Technology used: UDO watchlist.

Limitations: The solution uses data browser table. User(s) need access to this functionality. Future JDE upgrades may allow watchlist on databrowser tables without the need to open databrowser. What we need is the data on the watchlist output, to highlight the number of orders released today (or date range) based on the databrowser query

Table/Application Used: F4209 held orders

Step 1

Open data browser and use F4209



Step 2

Create a new query. Use the choices shown on the right pane first. This opens multitude of watch lists for operations (one for sales and another for purchasing where hold codes are used)

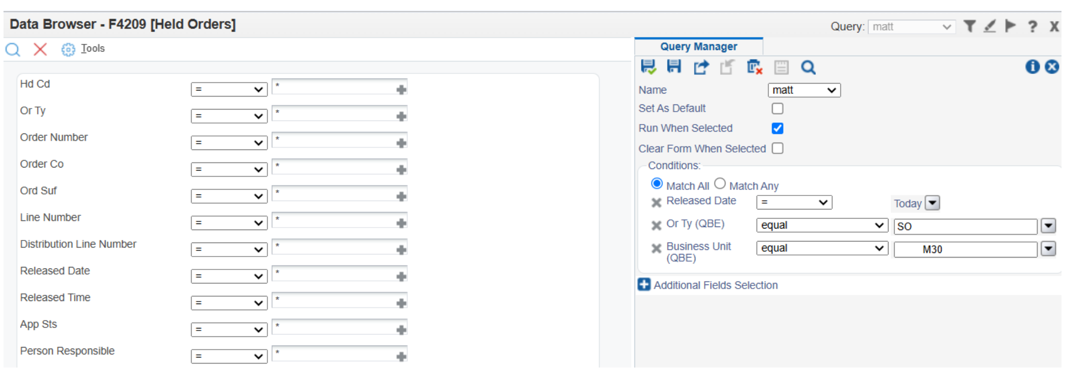
You can go creative with using =, <=, etc. on the release date value and use the option of today or <=7 days based on your business needs.

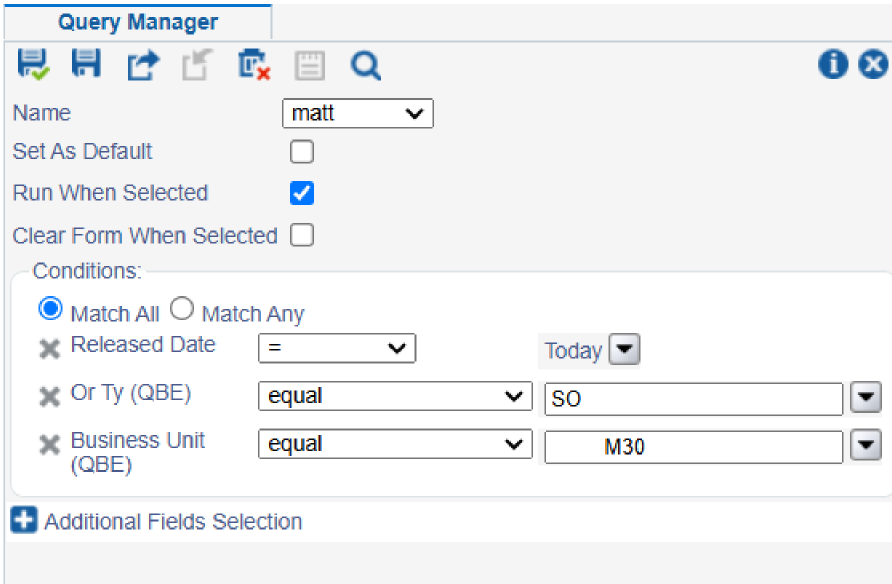
Use your popular sales order type in Or Ty field. In this example we want to know what credit hold (example C1) are released today.

Use your one or many branch plant applicable, to avoid JDE taking lot of time scanning all the table data.

Start with one easy example and then copy the query for various order types, branches, order holds (this field is not shown in the screen below)

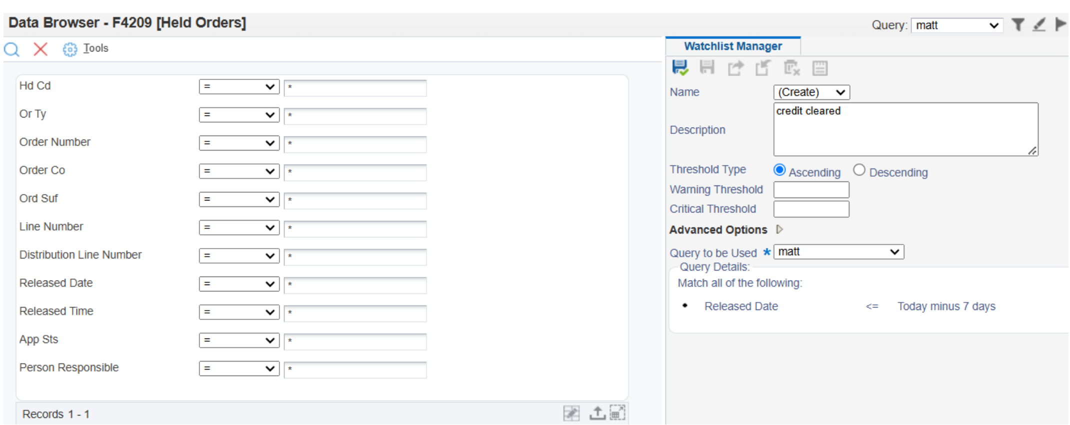
When you save the query (in this example below: matt), it will automatically show up in the personal queries option in the databrowser. No need to input table, environment details once again.

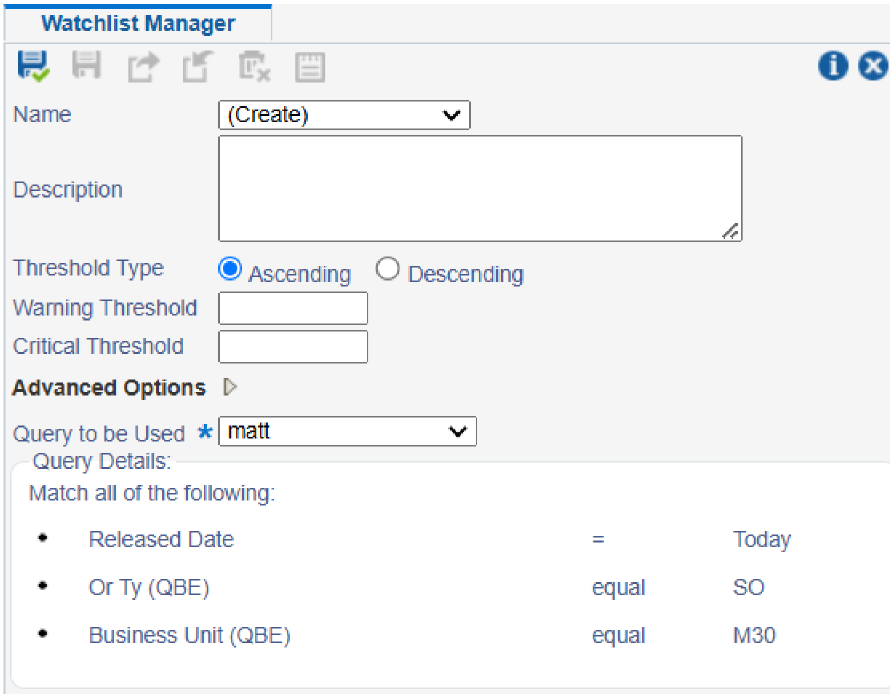




Step 3

Click on the watch list icon on the data browser. Select the query you previously created. Save the watchlist with a unique name





Step 4

If you go back to main JDE application, open watchlists, you knew one will show up. Press the refresh circle to get new data. The watchlist will show the count, but will NOT open the databrowser automatically. Open data browser and select personal queries, look for your custom query. The window will open up with the watchlist output. You can extract branch/customer#/order# data to push the sales orders into the sales execution process.

NOTE: This is a very powerful watchlist which can be used in any sales order doc types and also purchase order doc types, where hold codes are placed and released by different functional groups. CSR needs to be aware of the happenings and this watchlist helps them to be alerted and responsive.

Tips: You can also the same table if you want to know orders (sales or purchases) that went on a hold that day (or previous x days, if required). Use order date and hold code values in your query. A watch list will tell the orders that went on holds that day (or previous x days)

2. Order Backlog Alert

Functional Area	Distribution
Number	2
Title	Order Backlog Alert
Description	CSR or customer service management needs to know the key customer's backlog data to pro-actively shift customer priorities and delivery schedules. This is also an important S&OP indicator
Purpose	Get alerts on important customers.
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

Business Requirement:

As sales supervisor or manager, you want to know the backlog report real time. The days of the hard copy print out or emailed report are outdated. You want to focus on priority or VIP customers, who have your phone number or email contacts. You want to be ahead of the game before the customer calls you on the order status.

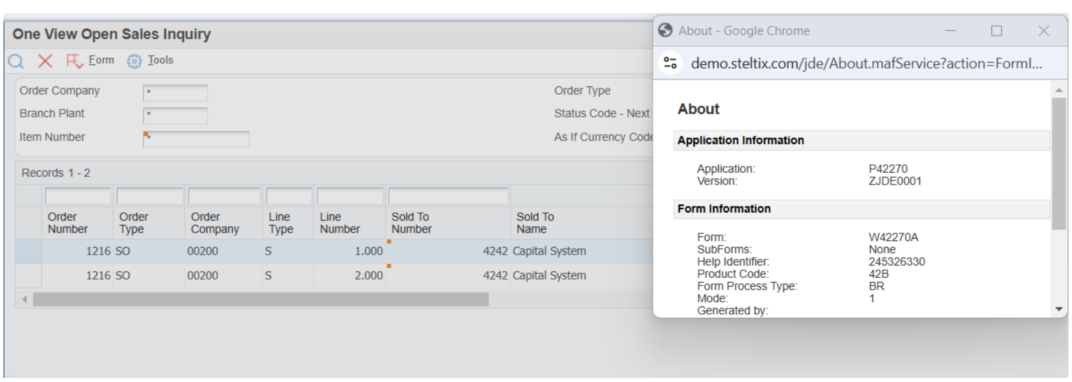
Technology used: One View Inquiry

Limitations: We are using One View standard inquiry which may not have all the hundreds of sales order header/details fields. But it serves the watchlist purposes.

Table/Application Used: P42270

Step 1

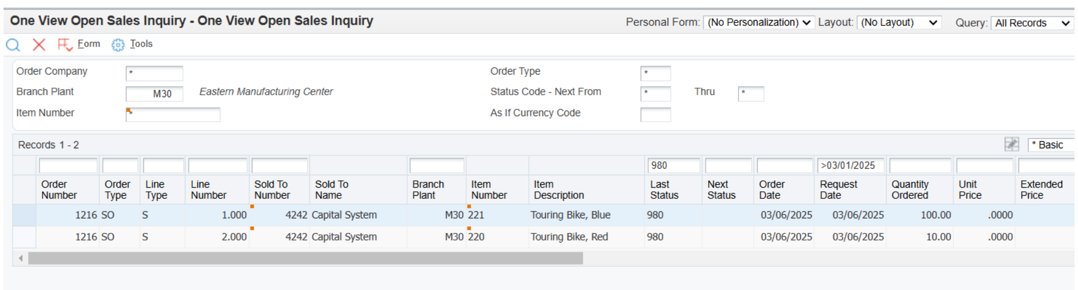
Open this application from your menu. If it does not exists, ask IT to deploy to your security role. You will be testing this in non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2

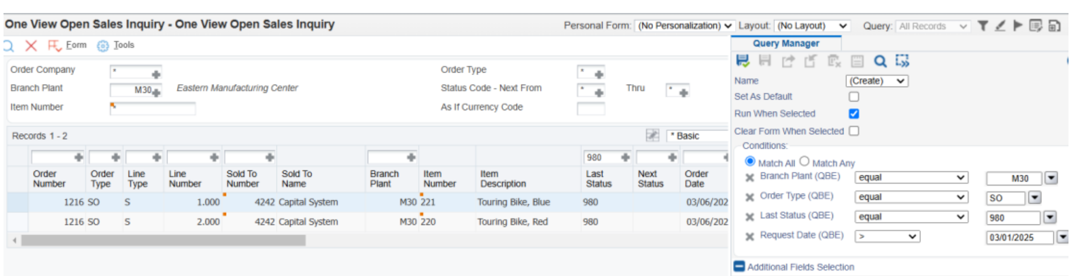
Customize the grid (example below), place some QBE values to get valid data points.

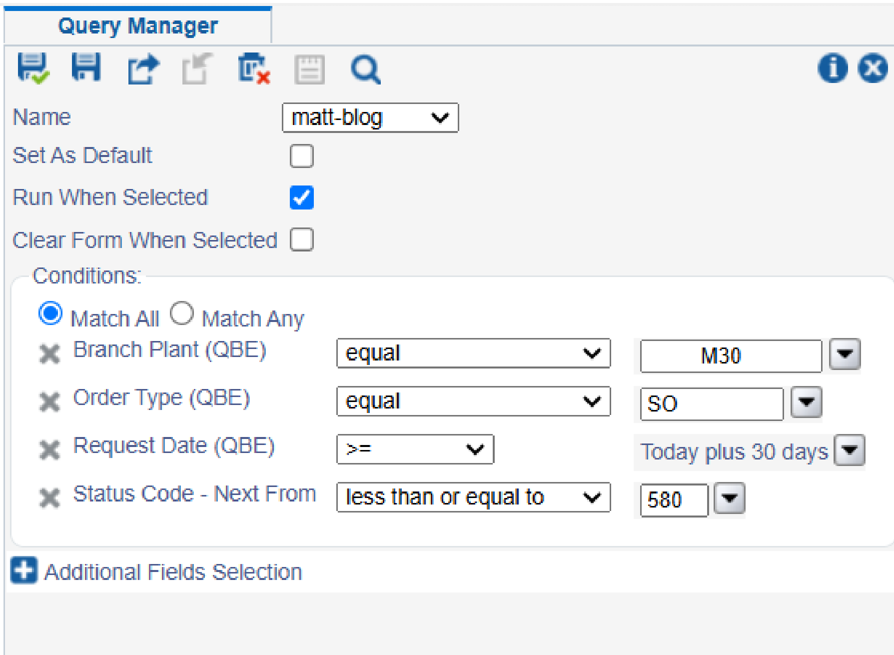
Tips: If you provide basic query values in the fields on what you intend to achieve, the query creation gets easy, since that process takes the values from this screen.



Step 3

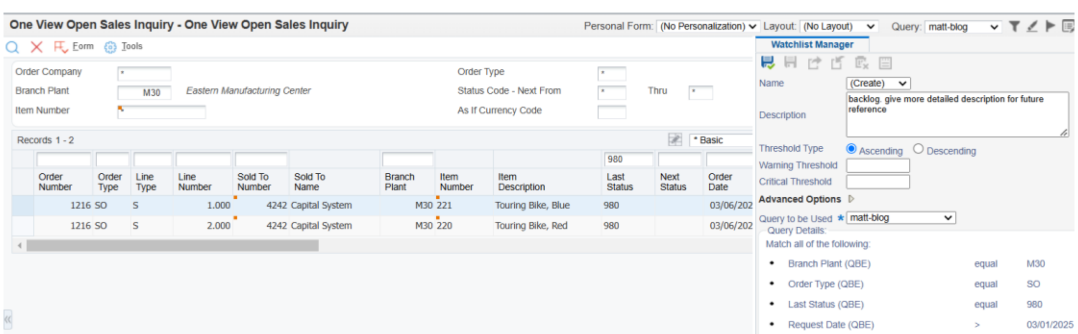
Create a new query. Use the right pane selections to start with. Branch plant, order type, last status (580 in this example), request date >today plus 30 days (as example). Save the query with a unique understandable name

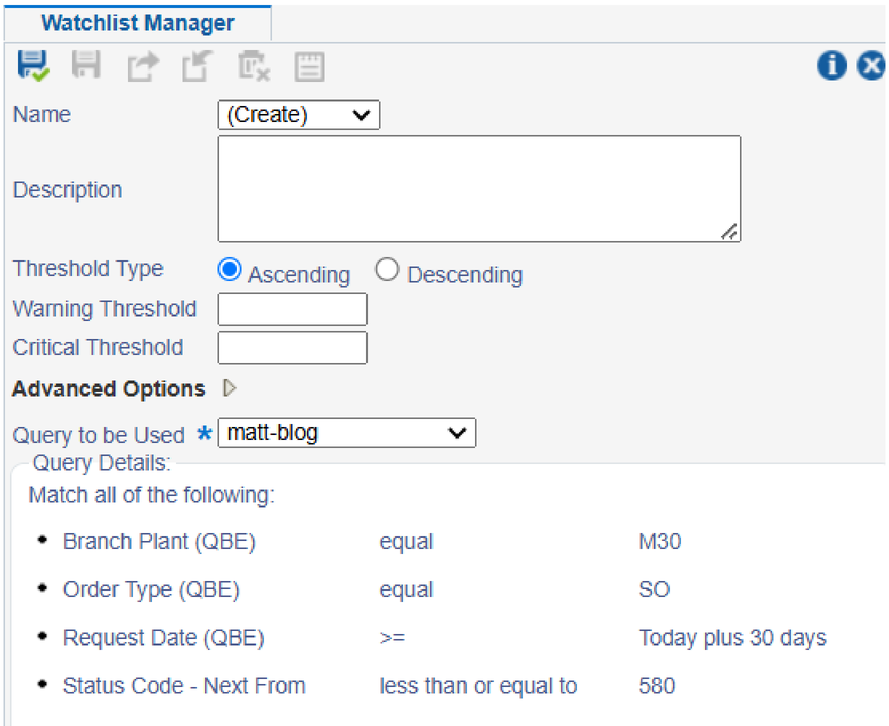




Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage





Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the oneview sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to the all records option if you feel the watchlist extract is incorrect.

NOTE: This is a very powerful watchlist which can be used in any sales order doc types and on your priority customers' backlog. You can use sales order category codes to filter out critical customers, if your company uses those cat codes. Also use filters like extended price or order quantity to get critical data for your business. You do not want another report of ALL backlog orders. This query can be used in S&OP review meetings for real-time inquiries. On the custom application grid, hide unwanted fields like company number, unit cost, etc. This custom grid can locked to your specific security role profile if cost data is considered confidential to the wider audience.

3. Orders Due Next 30 days

Functional Area	Distribution
Number	3
Title	Orders Due Next 30 days
Description	CSR or customer service management needs to know the key customer's backlog data to pro-actively shift customer priorities and delivery schedules. This is also an important S&OP indicator
Purpose	Get alerts on important customers.
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

Orders Due Next 30 days

Business Requirement:

As sales supervisor or manager, your manager or management wants to know future orders from specific or group of customers in a S&OP meeting. You don’t have to take notes and go back to send that information in an email later. Run this watchlist and filter out data in real-time. Or use CAFE1 choices (discussed later) to present the data together with the customer you selected for the review.

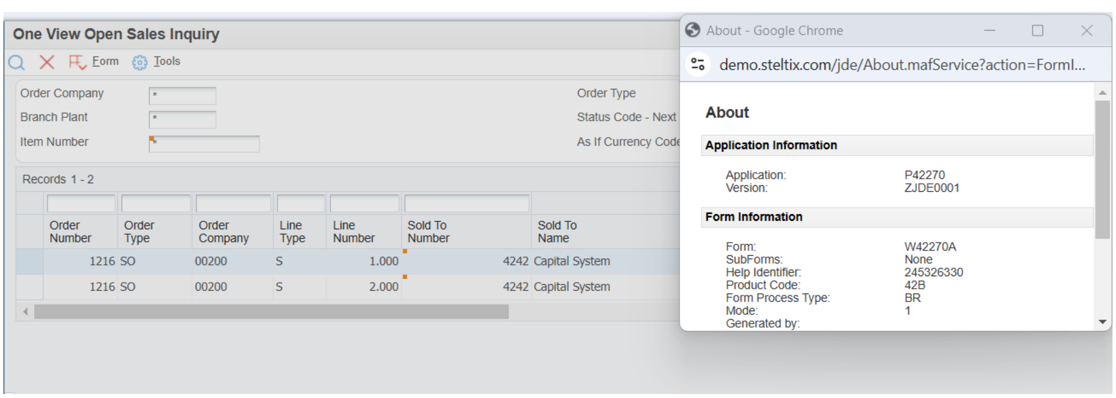
Technology used: One View Inquiry

Limitations: We are using One View standard inquiry which may not have all the hundreds of sales order header/details fields. But it serves the watchlist purposes.

Table/Application Used: P42270

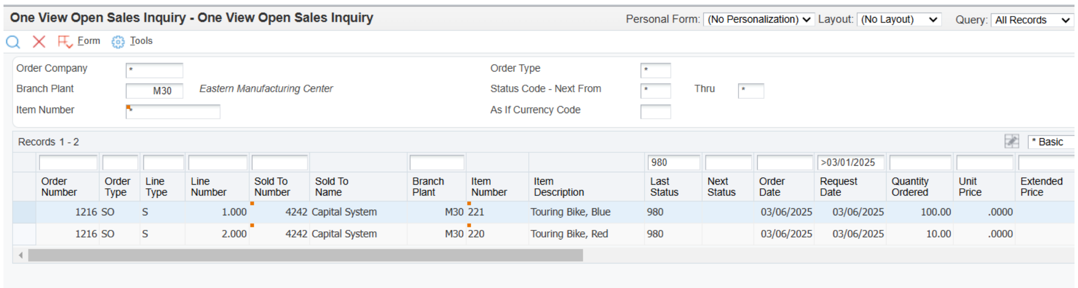
Step 1

Open this application from your menu. If it does not exists, ask IT to deploy to your security role. You will be testing this in non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



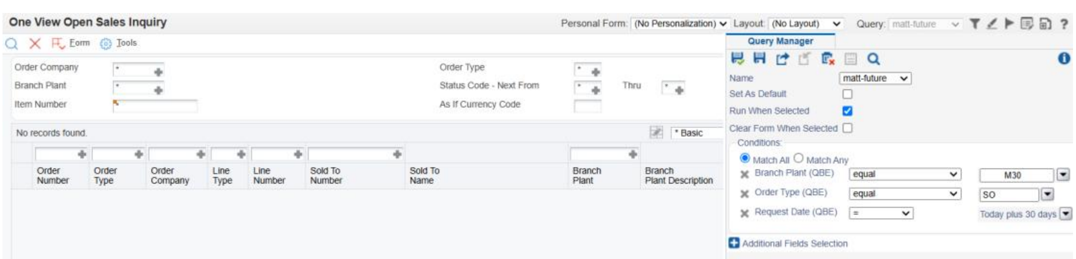
Step 2

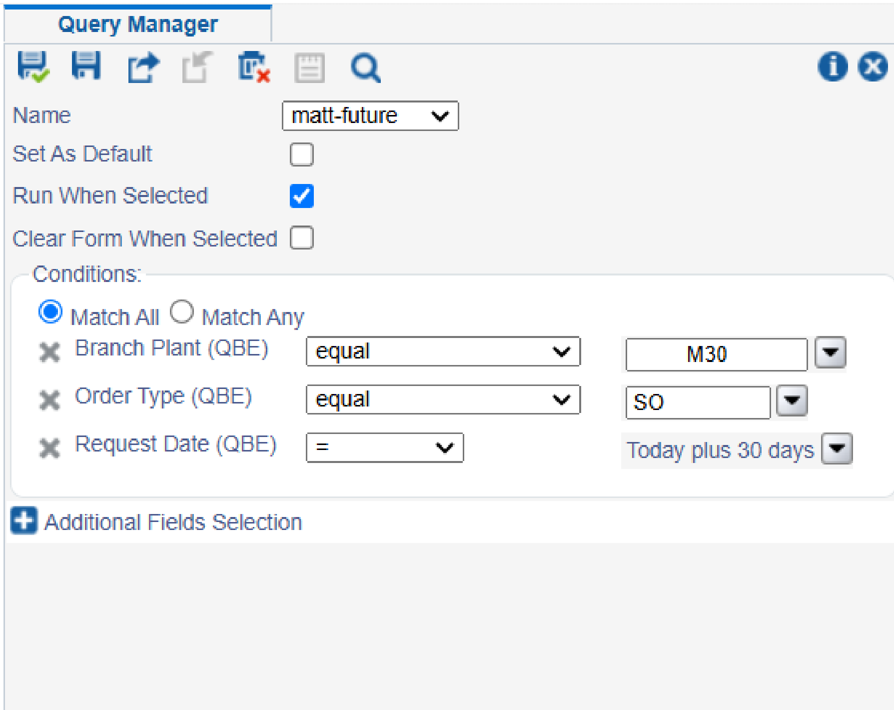
Customize the grid (example below), place some QBE values to get valid data points



Step 3

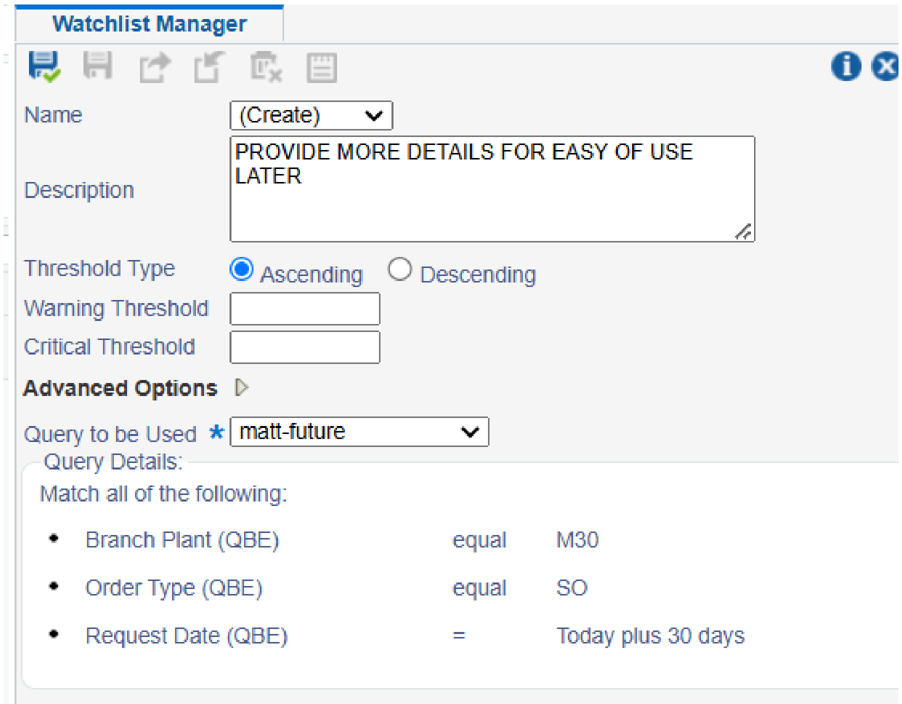
Create a new query. Use the right pane selections to start with. Branch plant, order type, request date = today plus 30 days (as example). Save the query with a unique understandable name





Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the oneview sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to the all records option if you feel the watchlist extract is incorrect.

NOTE: This is a very powerful watchlist which can be used in any sales order doc types and on your priority customers. You can use sales order category codes to filter out critical customers, if your company uses those cat codes. Also use filters like extended price or order quantity to get critical data for your business. You do not want another report of ALL future orders. This query can be used in S&OP review meetings for real-time inquiries. On the custom application grid, hide unwanted fields like company number, unit cost, etc. This custom grid can locked to your specific security role profile if cost data is considered confidential to the wider audience.

4. Orders Delayed Past 30 days

Functional Area	Distribution
Number	4
Title	Orders Delayed Past 30 days
Description	CSR or customer service management needs to know the key customer’s backlog data to pro-actively shift customer priorities and delivery schedules. This is also an important S&OP indicator
Purpose	Get alerts on important customers.
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

Orders Delayed Past 30 days

Business Requirement:

As sales supervisor or manager, your manager or management wants to know PAST DUE orders from specific or group of customers in a S&OP meeting. You don’t have to take notes and go back to send that information in an email later. Run this watchlist and filter out data in real-time. Or use CAFE1 choices (discussed later) to present the data together with the customer you selected for the review.

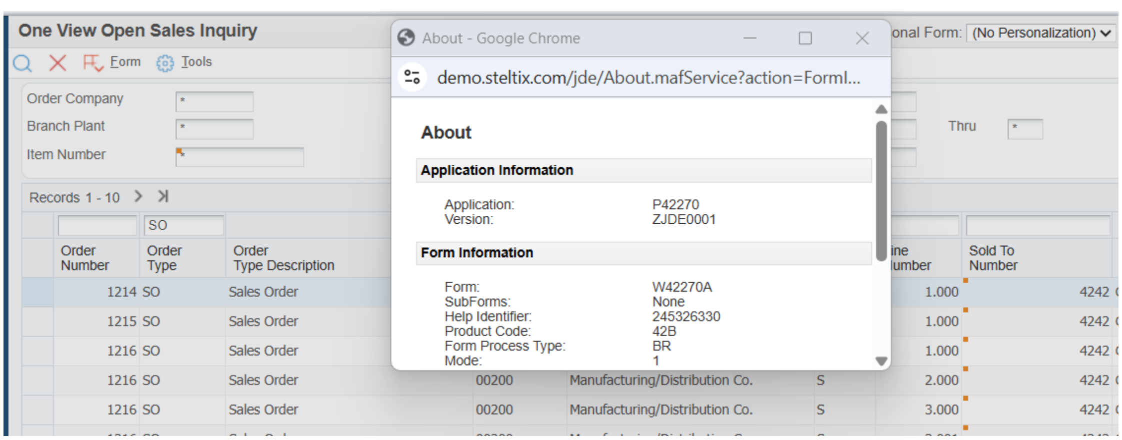
Technology used: One View Inquiry

Limitations: We are using One View standard inquiry which may not have all the hundreds of sales order header/details fields. But it serves the watchlist purposes.

Table/Application Used: P42270

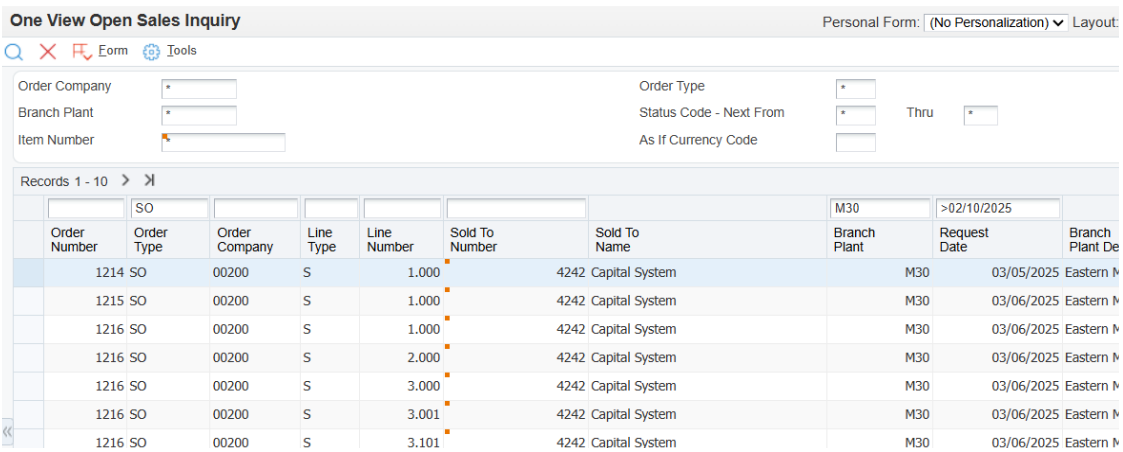
Step 1

Open this application from your menu. If it does not exists, ask IT to deploy to your security role. You will be testing this in non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



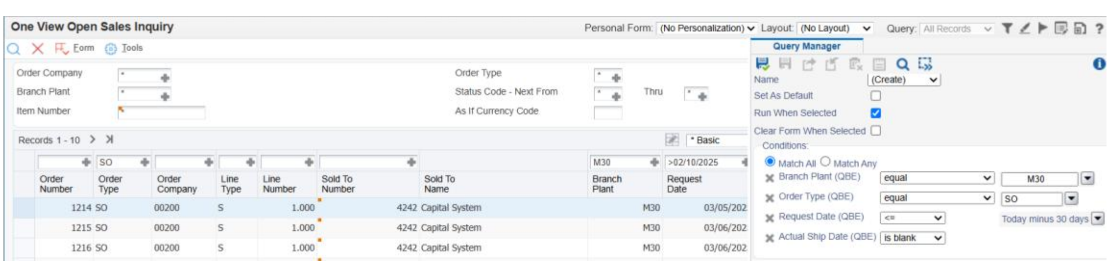
Step 2

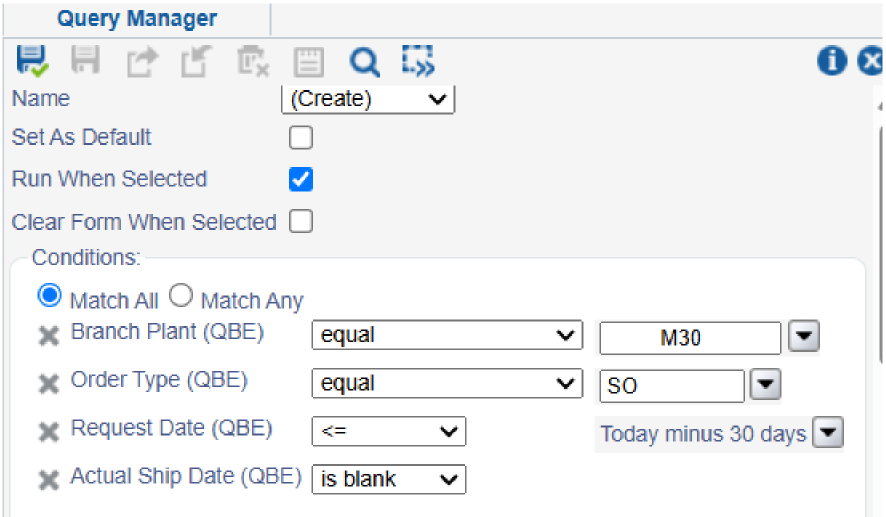
Customize the grid (example below), place some QBE values to get valid data points



Step 3

Create a new query. Use the right pane selections to start with. Branch plant, order type, request date <= today minus 30 days (as example). And where actual ship date is blank. Save the query with a unique understandable name





Step 4

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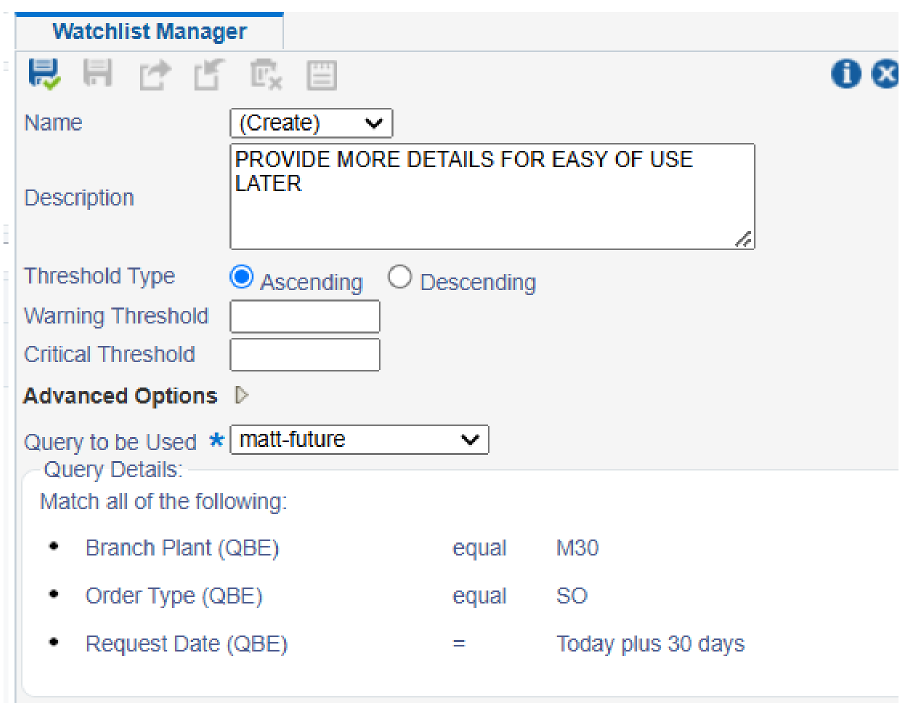


Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the oneview sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to the all records option if you feel the watchlist extract is incorrect.

NOTE: This is a very powerful watchlist which can be used in any sales order doc types and on your priority customers. You can use sales order category codes to filter out critical customers, if your company uses those cat codes. Also use filters like extended price or order quantity to get critical data for your business. You do not want another report of ALL BACKLOG orders. This query can be used in S&OP review meetings for real-time inquiries. On the custom application grid, hide unwanted fields like company number, unit cost, etc. This custom grid can locked to your specific security role profile if cost data is considered confidential to the wider audience.

5. Customer Billing Instructions Changes

Functional Area	Distribution
Number	5
Title	Customer Billing Instructions Changes
Description	AB is updated by different functional groups. In certain industry, flipping order or order line partials are very important in service level controls
Purpose	Get alerts on important customers.
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

Customer Billing Instructions Changes

Business Requirement:

Address book additions and modifications are managed by a different functional group. This includes customer master, customer billing instructions.

For example, you have a mix of customers who takes partial orders (not order lines) and some who do not take partial orders. Customer sends a complaint that there orders were partially shipped. As CSR or CSR Manager you can have this watchlist to know your exception customer list.

This example can be expanded to fields like backorder allowed, partial order line shipment, etc.

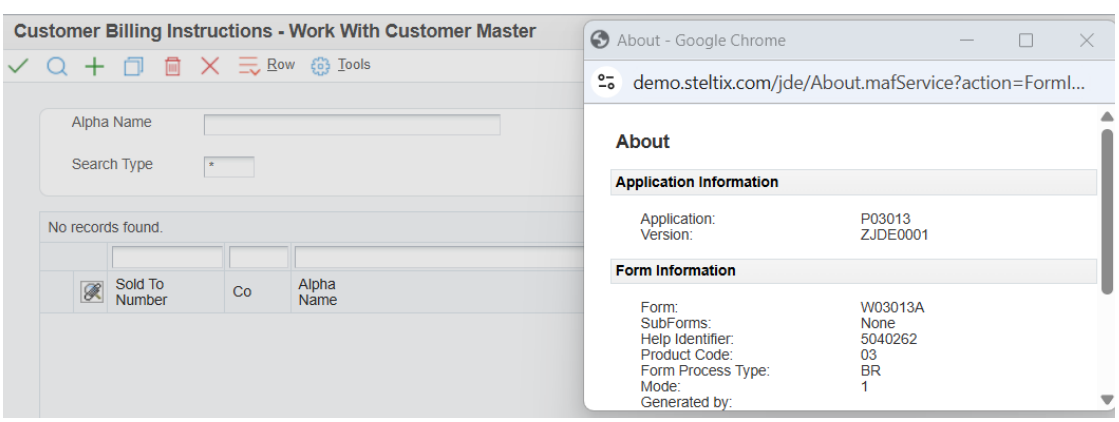
Technology used: Customer Master

Limitations: Ensure security is available on read only mode. The watch list does not allow making updates anyway

Table/Application Used: P03013

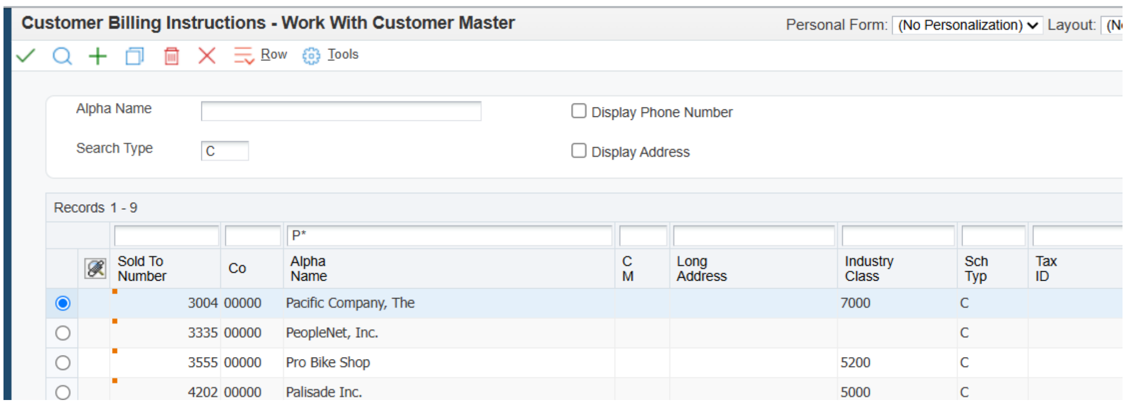
Step 1

Open this application from your menu. If it does not exists, ask IT to deploy to your security role. You will be testing this in non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists

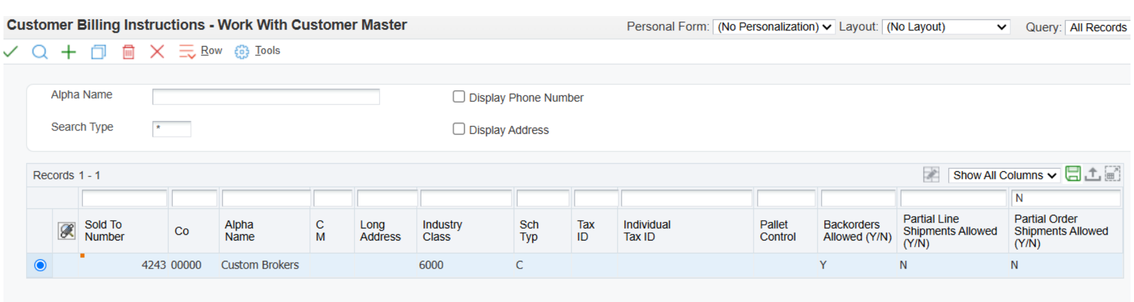


Step 2

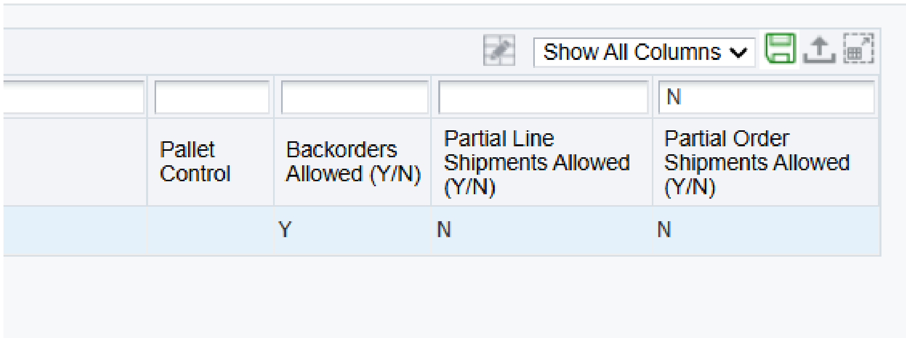
Customize the grid (example below), place some QBE values to get valid data points



Three extra fields are added to the grid using grid extension. See section on Grid Extensions on how to execute this step.

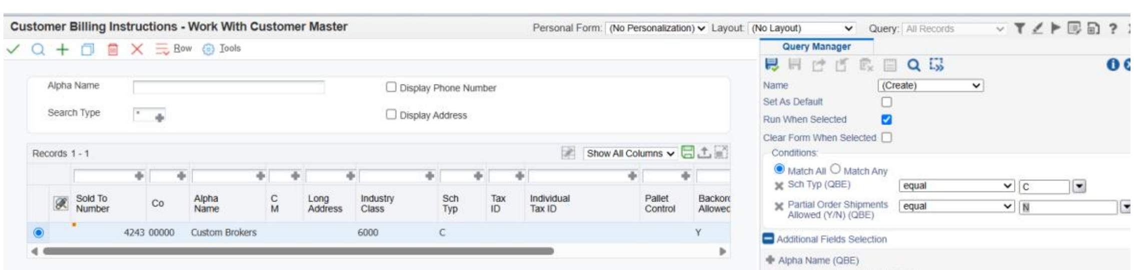


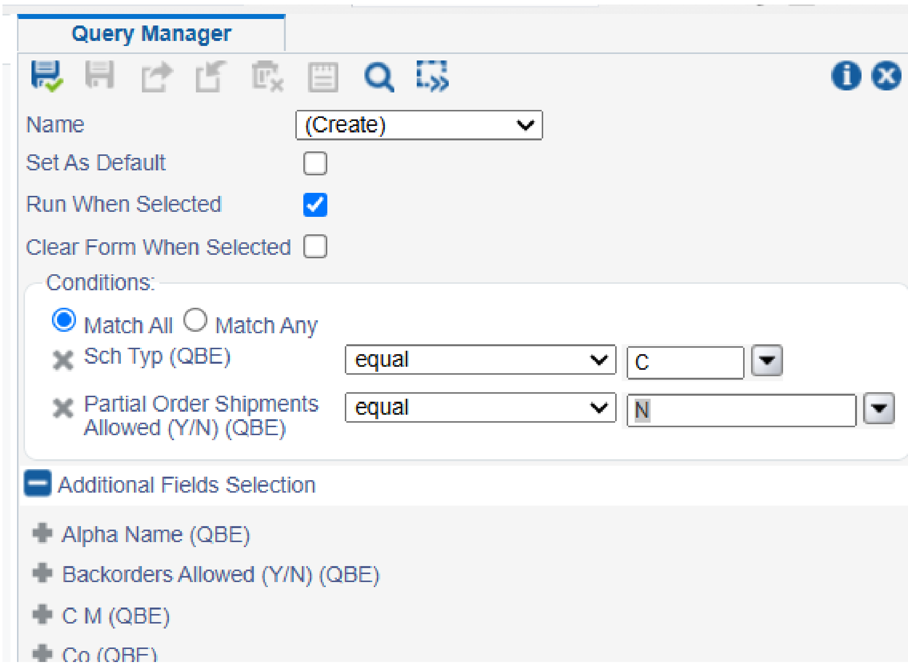
Closer view of the grid extension fields.



Step 3

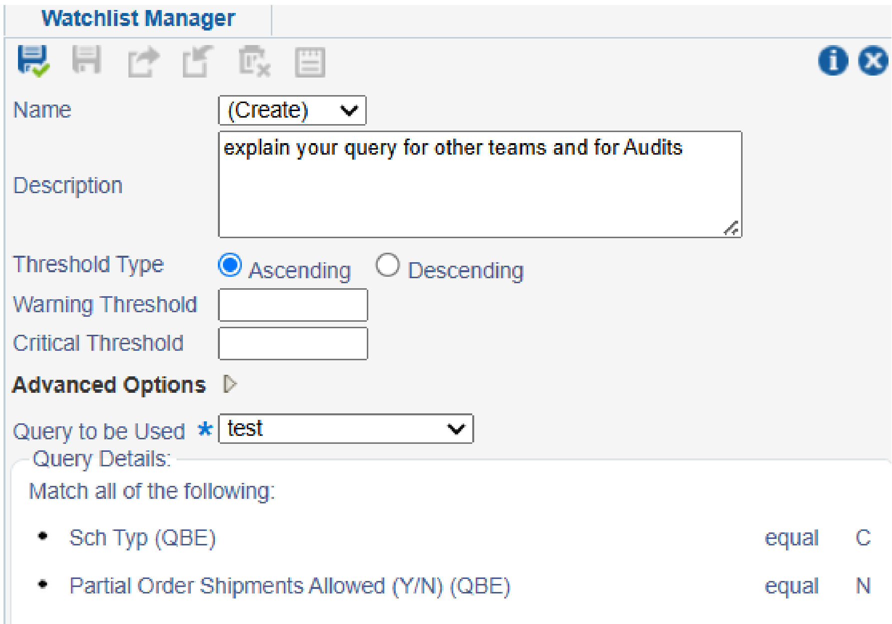
Create a new query. Use the right pane selections to start with. In this example, address type=C and partial order shipment=N are selected. If you bring date updated field in the grid extension, you add to this query to get data that got changed past 30 days (as an example). Save the query with a unique understandable name





Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the oneview sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to the all records option if you feel the watchlist extract is incorrect.

NOTE: This watch list helps to track customer configurations like order partials, back orders, etc. Very critical in large customer base organizations. The same concept can be used for vendor master too.

6. On hold Inventory Alert

Functional Area	Distribution
Number	6
Title	On hold Inventory Alert
Description	Inventory holds are critical from quality hold to customer holds. Who places and releases them is also critical information that needs to be shared across many functional groups
Purpose	Get alerts on key inventory hold process
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

On hold Inventory Alert

Business Requirement:

You want to know the hold codes of the item’s inventory that has on-hand balance. Your goal is to expedite the release of hold codes to fulfill the customer demands. Instead of asking other functional resources or IT for that report, you can build your own watchlist.

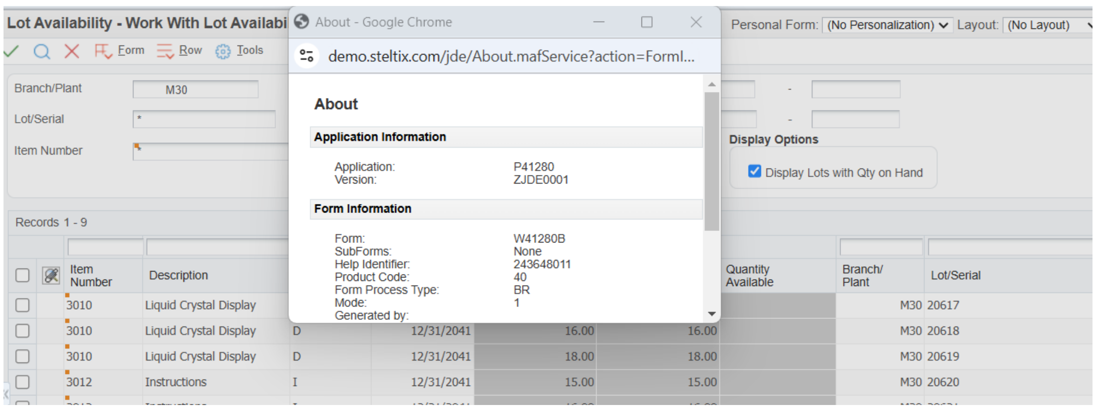
Technology used: UDO watchlist.

Limitations: This is real time data and does not include receipt routing holds/in transits

Table/Application Used: P41280

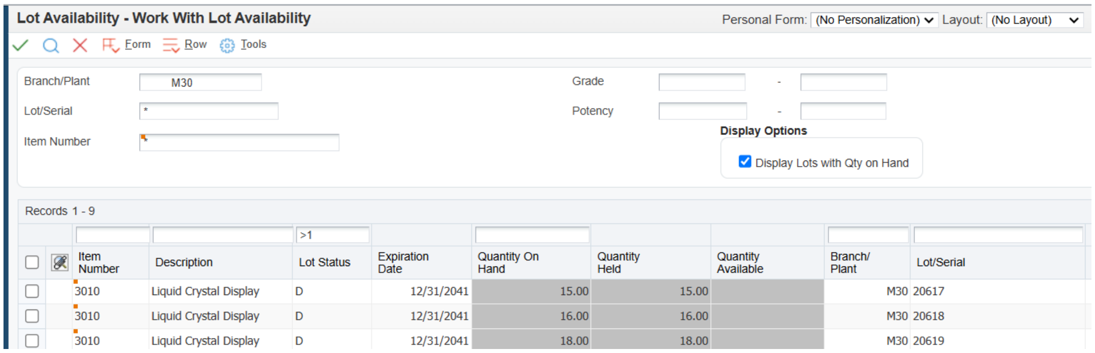
Step 1

Open Lot availability application



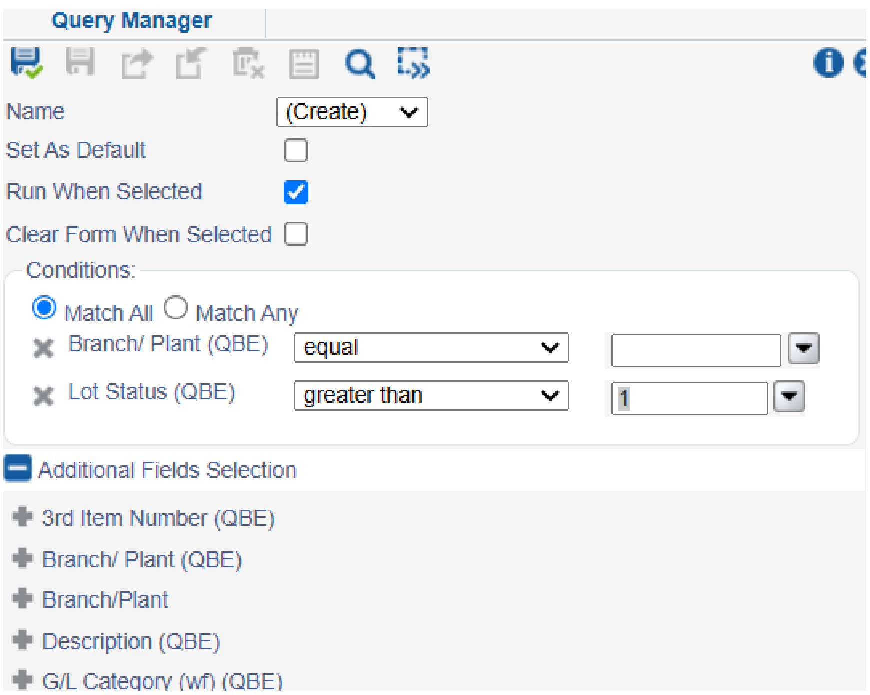
Step 2

Enter your branch and place >1 in lot status field. Make grid customization to hide unwanted fields.



Step 3

Build a query and select these two fields. If you have entered QBE previously it automatically populates that field. Save the query with a unique recognizable name.



Step 4

Create a watchlist for this query, give the same name.

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage

Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to the all records option if you feel the watchlist extract is incorrect.

NOTE: This is a very powerful watchlist which can be used in lot holds, lots that are expiring soon, or lot that have expired long time back. There are also JDE static reports on this subject. Watchlists are real-time and that can be shared to other functional groups through role security. Only lot hold concept is explained in this example page.

7. Negative inventory Alert

Functional Area	Distribution
Number	7
Title	Negative inventory Alert
Description	Negative inventory is not a good business practice. If you are making them zero at the end of the month, that means functional groups are not talking to each other!
Purpose	Get alerts on key inventory on-hand process
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

Negative inventory Alert

Business Requirement:

The best business practice is NOT to make inventory go negative!. But things do happen in business. If you have NOT turned OFF going negative in workorder issues, work order completion, inventory receipts, inventory adjustments, etc. Your inventory go negative. This impacts MRP and also inventory valuation reports. Some companies place a large negative inventory quantity just to alert users that the product/component is no longer used. Again, an outdated practice!

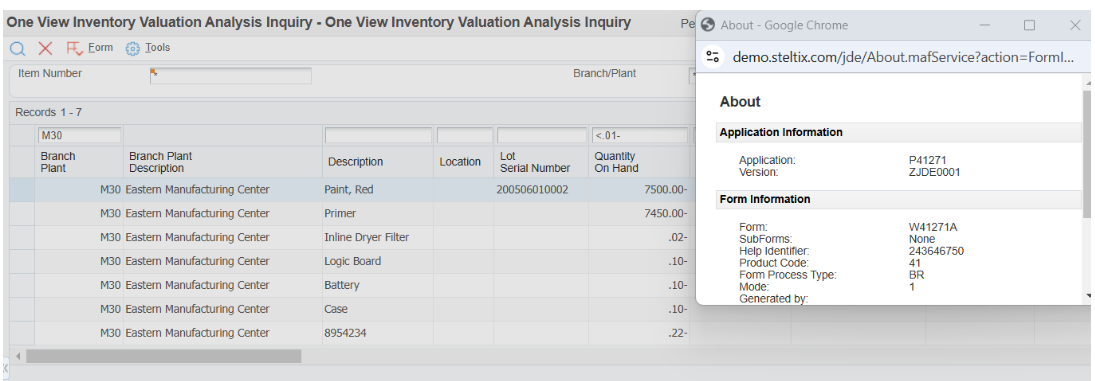
Technology used: UDO watchlist.

Limitations: Ensure you have security access to run this application

Table/Application Used: P41271

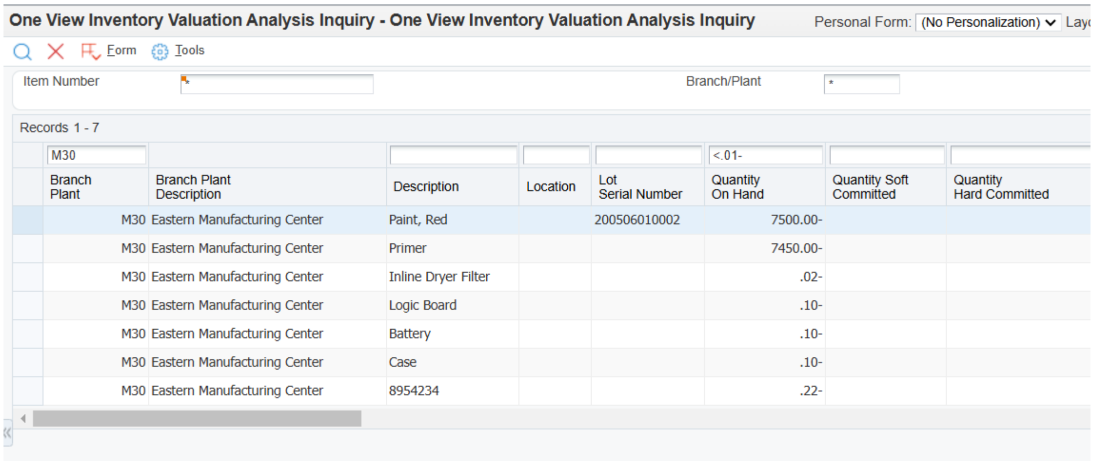
Step 1

Open Lot availability application



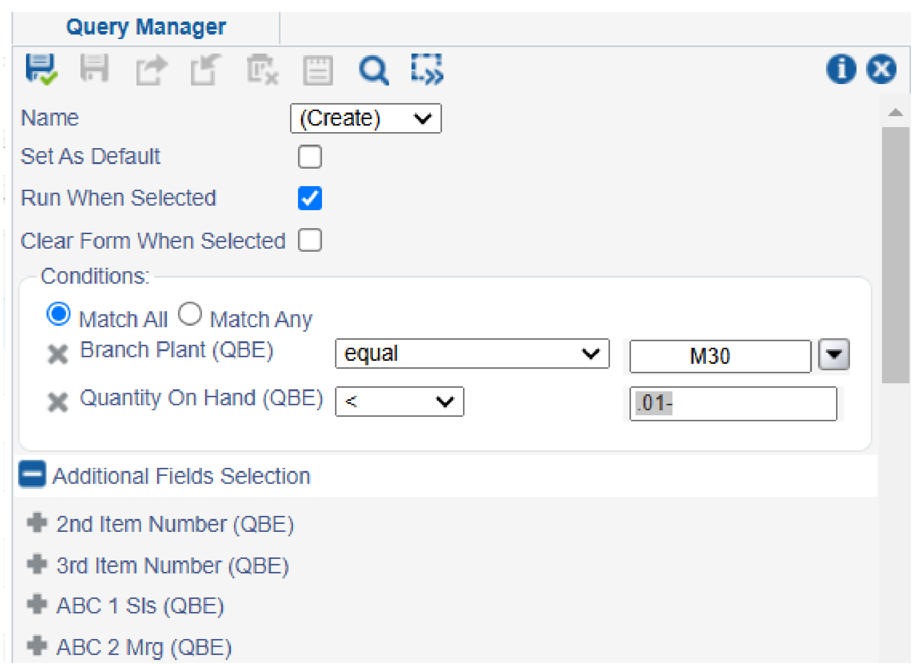
Step 2

Enter your branch and place <0.01 in qty on hand field. Make grid customization to hide unwanted fields.



Step 3

Build a query and select these two fields. If you have entered QBE previously it automatically populates that field. Save the query with a unique recognizable name.



Step 4

Create a watchlist for this query, give the same name.

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage

Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to the all records option if you feel the watchlist extract is incorrect.

NOTE: This example can be expanded to find same lots available in multiple locations or branches (if allowed in your configurations) and filter on ABC codes (if updated periodically). Another tip is use this example to figure out hard committed inventory on key products and/or components. Any large volume of data on those fields may mean you are NOT running sales; purchases and work order **reposts.**

8. Zero Cost items alert

Functional Area	Distribution
Number	8
Title	Zero Cost items alert
Description	Zero costed items mess up the accounting entries. If you are fixing them at the end of the month, that means functional groups are not talking to each other! Get Alert as it happens
Purpose	Get alerts on key zero cost items
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

Zero Cost items alert

Business Requirement:

You need to have cost associated with your purchased items and cost rolled up for your manufactured products. Any transactions conducted with zero costs will impact your accounting books and finance need to make journal entries. Most importantly, these zero costs sit in the system for many weeks or months, thereby impacting lot of reports used by management.

If you are in PDM group and/or in Costing group, you need to use this watchlist and get alerts promptly. This is very critical on short cycle time manufactured products in a high NPI (new product introductions) environment.

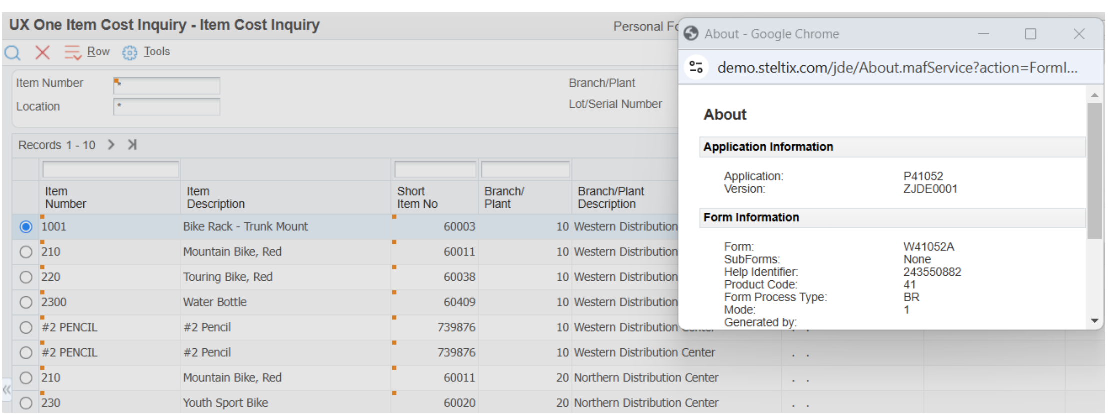
Technology used: UDO watchlist.

Limitations: Ensure you have security access to run this application

Table/Application Used: P41052

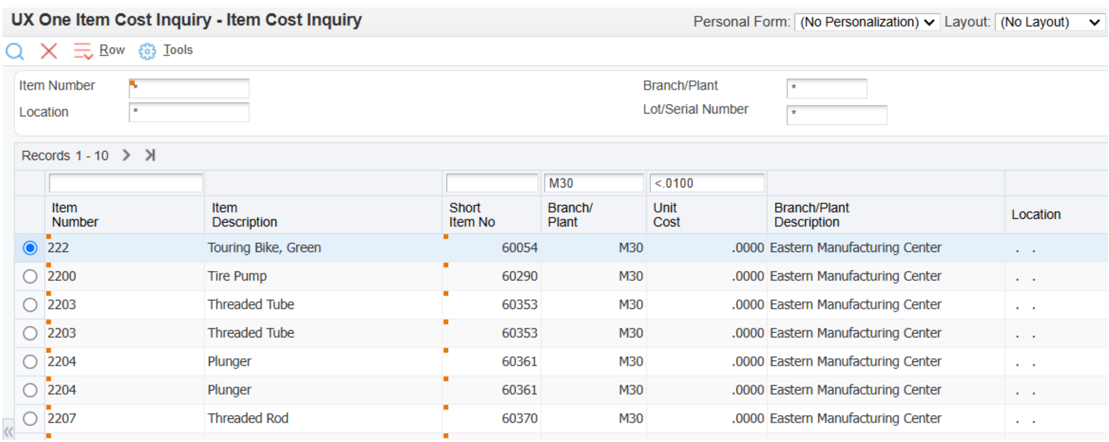
Step 1

Open UX one cost inquiry application



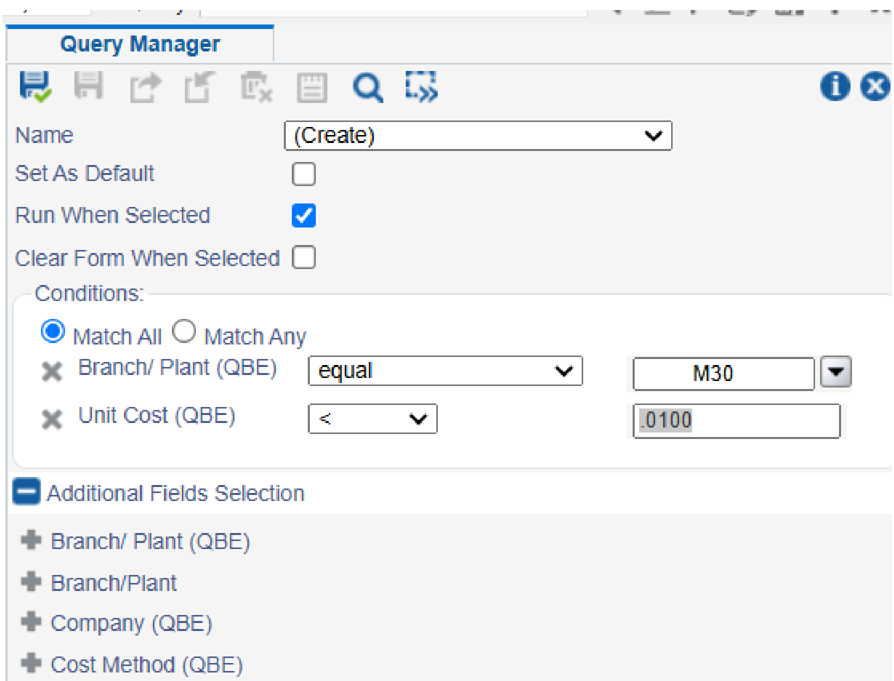
Step 2

Enter your branch and place <0.01 in unit cost field. Make grid customization to hide unwanted fields. Ensure you have selected show all columns grid.



Step 3

Build a query and select these two fields. If you have entered QBE previously it automatically populates that field. Save the query with a unique recognizable name.



Step 4

Create a watchlist for this query, give the same name.

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage

Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to the all records option if you feel the watchlist extract is incorrect.

NOTE: This example can be expanded to find zero costs in other cost types like 02, 08, etc. Also like exception alert for costs >$10000, in a business environment where new products and costs are added on a daily basis. You want to catch the errors and exception well before transactions hit the GL.

9. Cost Ledger Surprises 08 vs 07 Alert

Functional Area	Distribution
Number	9
Title	Cost Ledger Surprises 08 vs 07 Alert
Description	Quickly compare 08 vs 07 before you take 08 into consideration in the cost rollup process. This saves time in data errors or decimal mistakes (coming from uom conversions)
Purpose	Get alerts on key cost items
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

Cost Ledger Surprises 08 vs 07 Alert

Business Requirement:

Companies typically use 08 cost method to load purchasing standards. When you roll up the product costs, JDE creates/updates the 07 cost method. You are not supposed to manually update the 07 costs in the application. That will have huge impact on WIP, inventory valuation, etc.

Some user could manually update certain 08 records but didn't communicate the cost accounting to re-roll the costs. You need a watchlist that will compare these costs based on your threshold $ values. You can then export this data into excel to do VLOOKUP on differences. Currently JDE does not have the feature to compare one JDE field to another JDE field to give 'not equal to' rules.

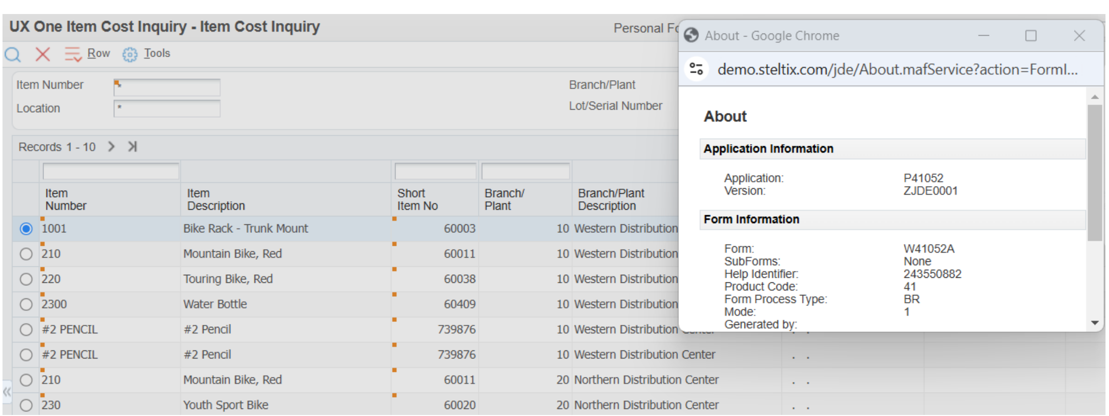
Technology used: UDO watchlist.

Limitations: Ensure you have security access to run this application

Table/Application Used: P41052

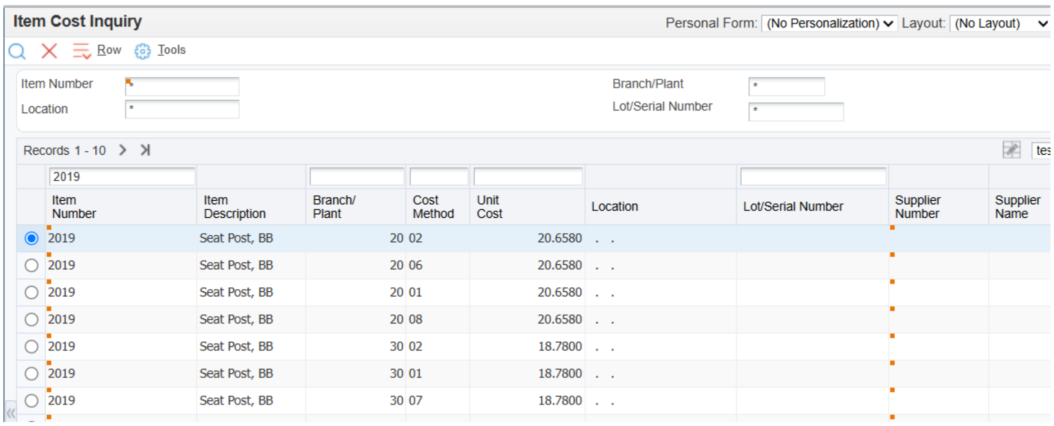
Step 1

Open UX one cost inquiry application



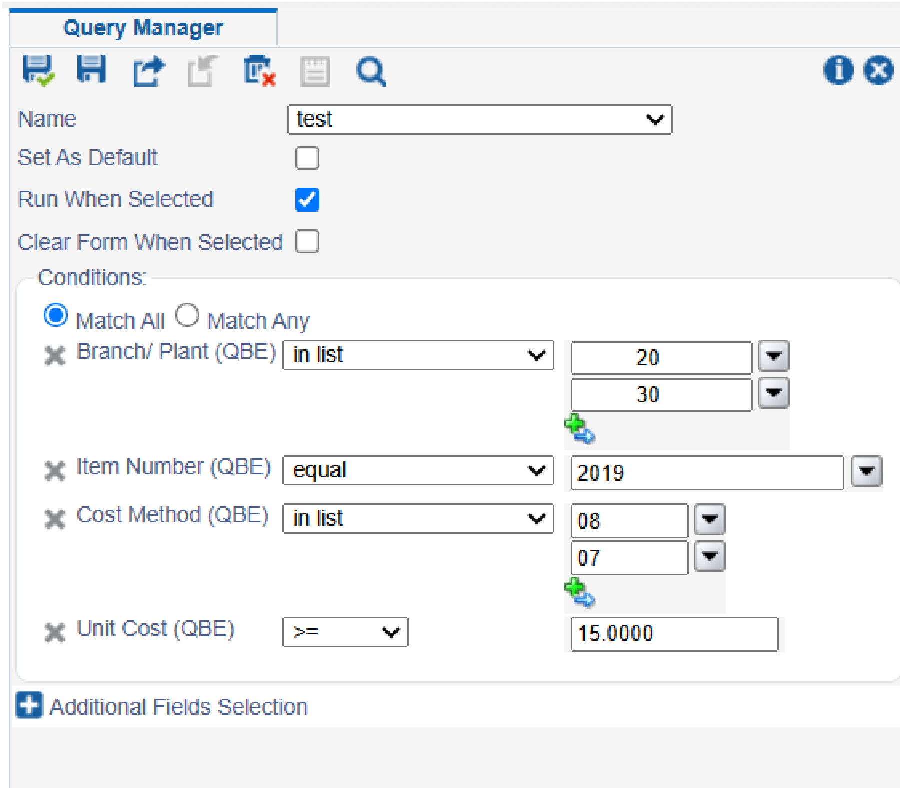
Step 2

Enter your branch and place >0.01 in unit cost field. Make grid customization to hide unwanted fields. Ensure you have selected show all columns grid, before making grid customization.



Step 3

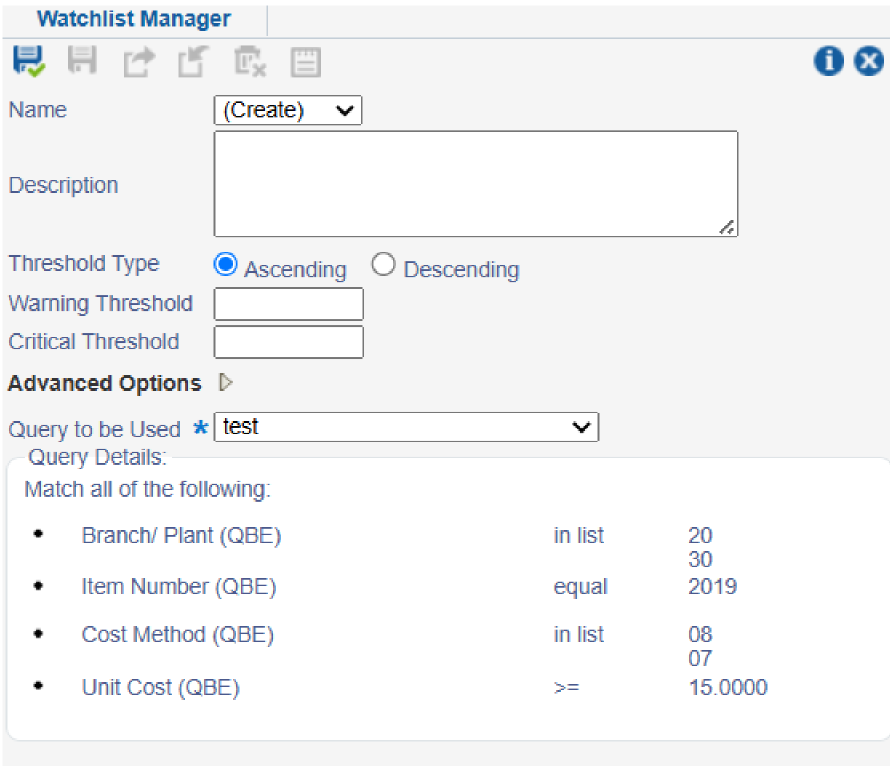
Build a query and select these two fields. If you have entered QBE previously it automatically populates that field. Save the query with a unique recognizable name.



$15 is an example, given the demo data considerations

Step 4

Create a watchlist for this query, give the same name



Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage

Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to the all records option if you feel the watchlist extract is incorrect.

NOTE: This example is helpful during quarterly or annual cost roll up across all products and branches. You do not want purchasing or IT to keep loading 08 costs, which you already started the cost rollup company-wide on that weekend.

10. Cost Ledger Surprises 02 vs 07 Alert

Functional Area	Distribution
Number	10
Title	Cost Ledger Surprises 02 vs 07 Alert
Description	Quickly compare 02 vs 07 before you take 07 into consideration in the cost rollup process. This saves time in data errors or decimal mistakes (coming from uom conversions)
Purpose	Get alerts on key cost items
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

Cost Ledger Surprises 02 vs 07 Alert

Business Requirement:

Companies typically use 08 cost method to load purchasing standards. When you roll up the product costs, JDE creates/updates the 07 cost method. You are not supposed to manually update the 07 costs in the application. That will have huge impact on WIP, inventory valuation, etc.

Some user could manually update certain 08 records but didn't communicate the cost accounting to re-roll the costs. You need a watchlist that will compare these costs based on your threshold $ values. You can then export this data into excel to do VLOOKUP on differences. Currently JDE does not have the feature to compare one JDE field to another JDE field to give 'not equal to' rules.

In cases of weighted average model (02 cost method) JDE updates the cost dynamically or on batch code as the receiving transactions or AP payments are made. If you are in a transition from 07 to 02, it is better to keep a check on the data till the system is stable.

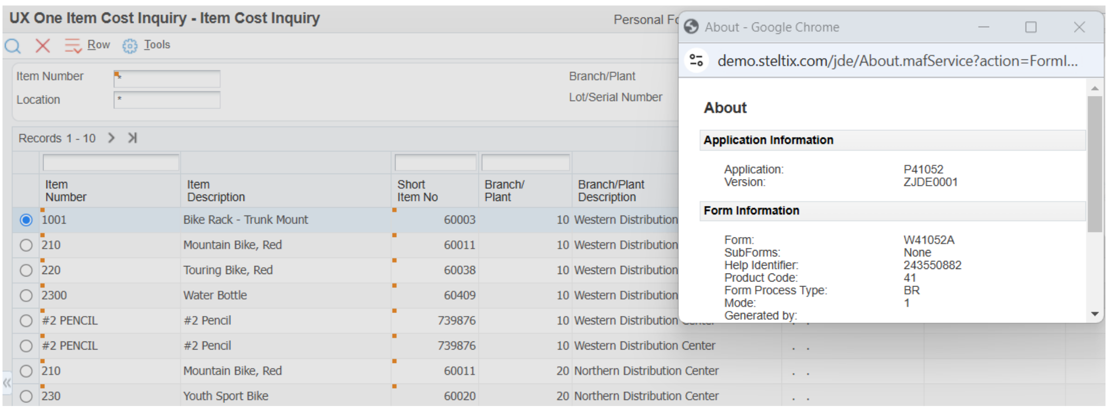
Technology used: UDO watchlist.

Limitations: Ensure you have security access to run this application

Table/Application Used: P41052

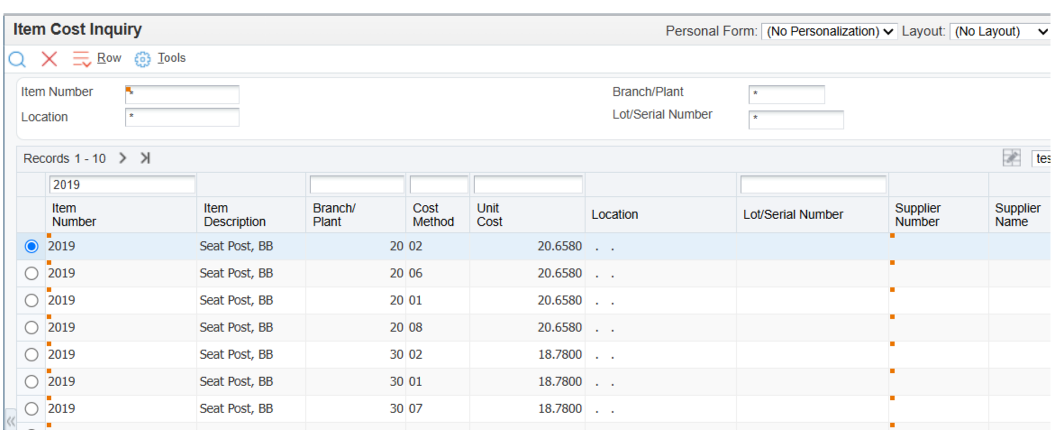
Step 1

Open UX one cost inquiry application



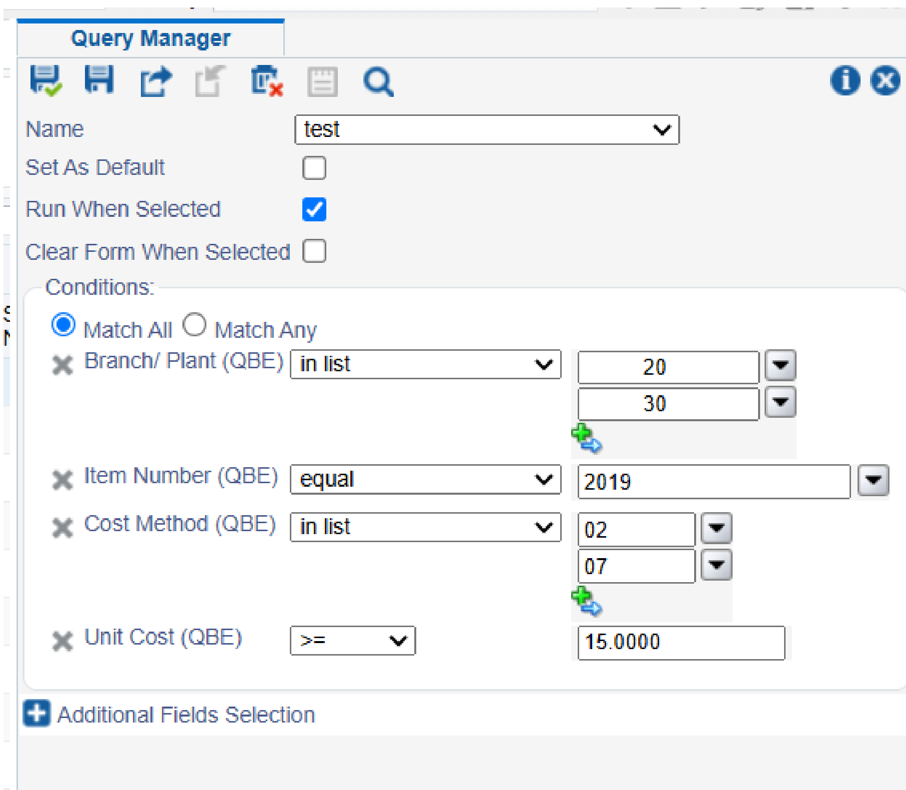
Step 2

Enter your branch and place >0.01 in unit cost field. Make grid customization to hide unwanted fields. Ensure you have selected show all columns grid.



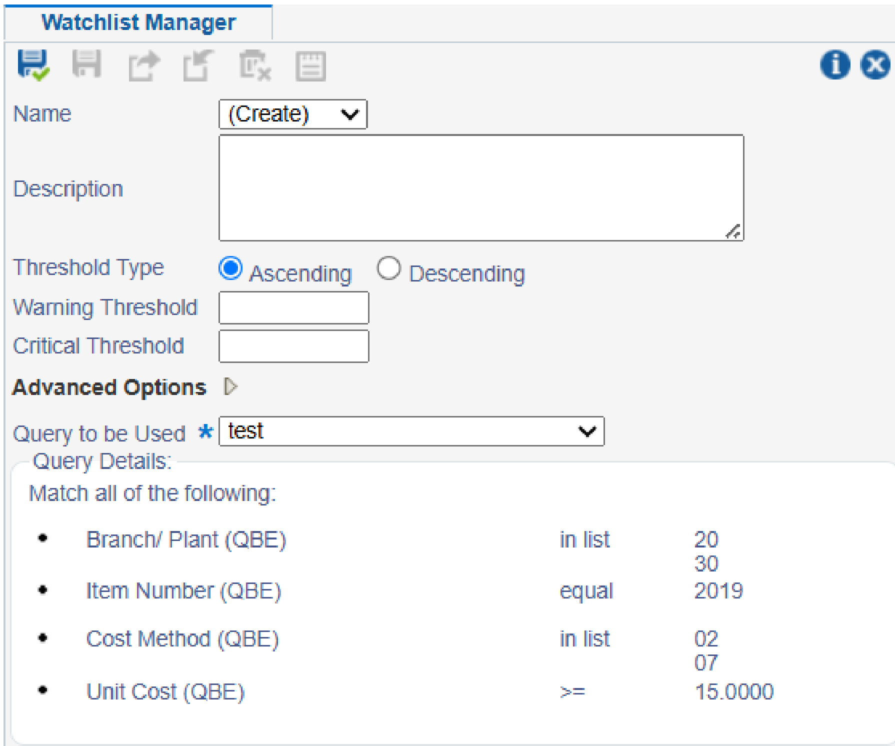
Step 3

Build a query and select these two fields. If you have entered QBE previously it automatically populates that field. Save the query with a unique recognizable name.



Step 4

Create a watchlist for this query, give the same name



Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage

Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to the all records option if you feel the watchlist extract is incorrect.

NOTE: This example is helpful if you are doing batch weighted average updates and any accidental negative inventory quantity or dollar value impacted your cost method. An exception check twice a year will help with better trust on the system and configurations

11. Cost Ledger Surprises YTD vs Last Year Alert

Functional Area	Distribution
Number	11
Title	Cost Ledger Surprises YTD vs Last Year Alert
Description	Quickly compare last year cost vs this year cost before you take freeze in the cost rollup process. This saves time in data errors or decimal mistakes (coming from uom conversions)
Purpose	Get alerts on key cost items
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

Cost Ledger Surprises YTD vs Last Year Alert

Business Requirement:

Companies do this exercise every annual fiscal close. Take the current 07 or 02 values and copy it to another cost method using Z files process or SQL updates. Example cost method naming could be 5A (for 2025 actuals). If you have done for many years you have the total cost pattern in the tables which could be analyzed for market trends and pricing policies

Probably, once in a quarter you want to see the cost progress this year in a standard cost or weighted average cost model. This inquiry helps to extract data based on your own data filters. There is no need to use data browser and/or ask for SQL extracts. You can export the data and do vlook-up for variations

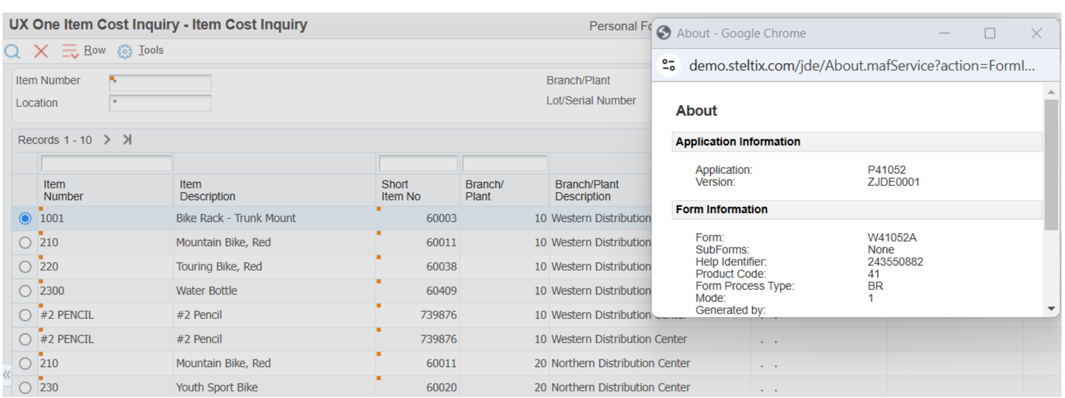
Technology used: UDO watchlist.

Limitations: Ensure you have security access to run this application

Table/Application Used: P41052

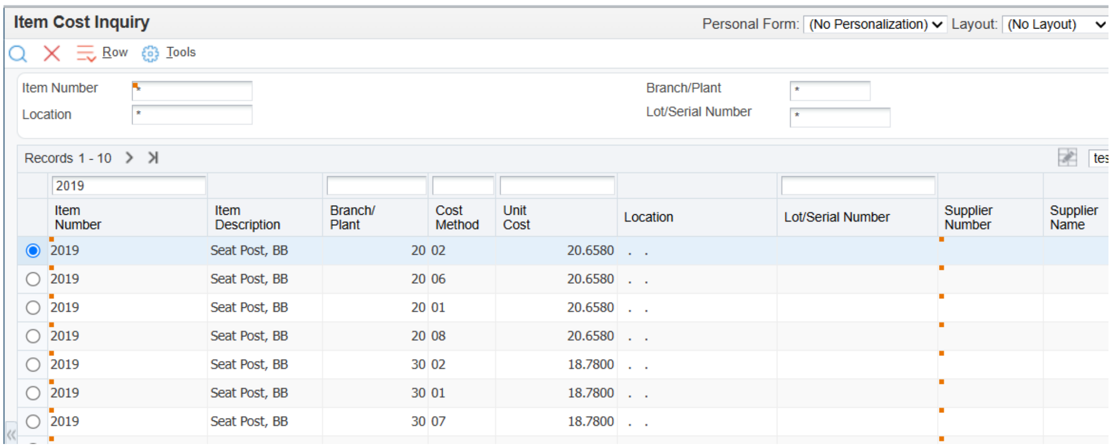
Step 1

Open UX one cost inquiry application



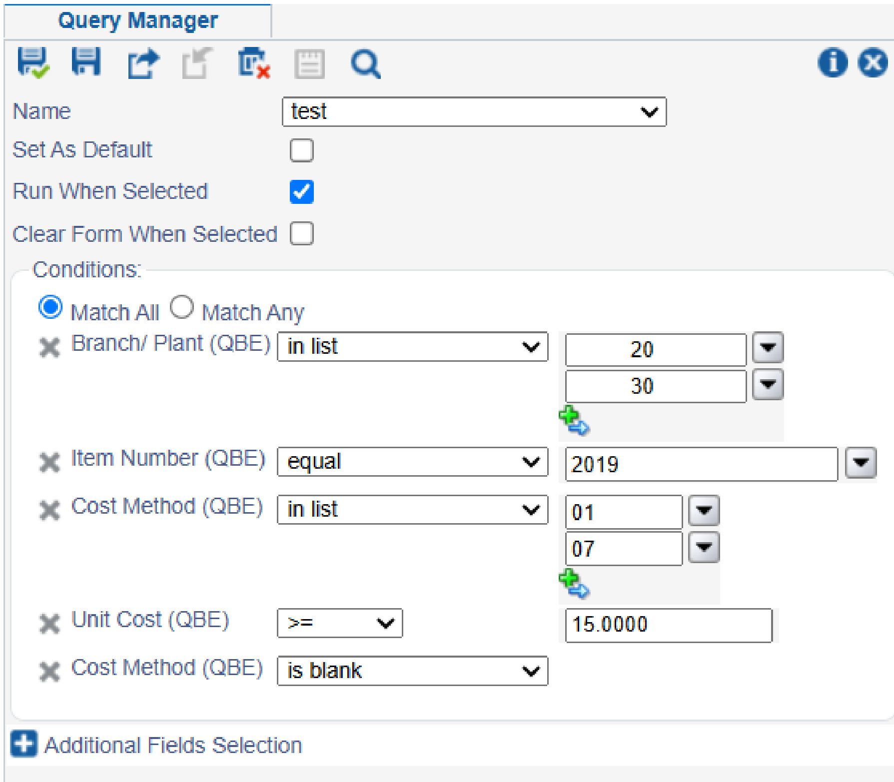
Step 2

Enter your branch and place >0.01 in unit cost field. Make grid customization to hide unwanted fields. Ensure you have selected show all columns grid.



Step 3

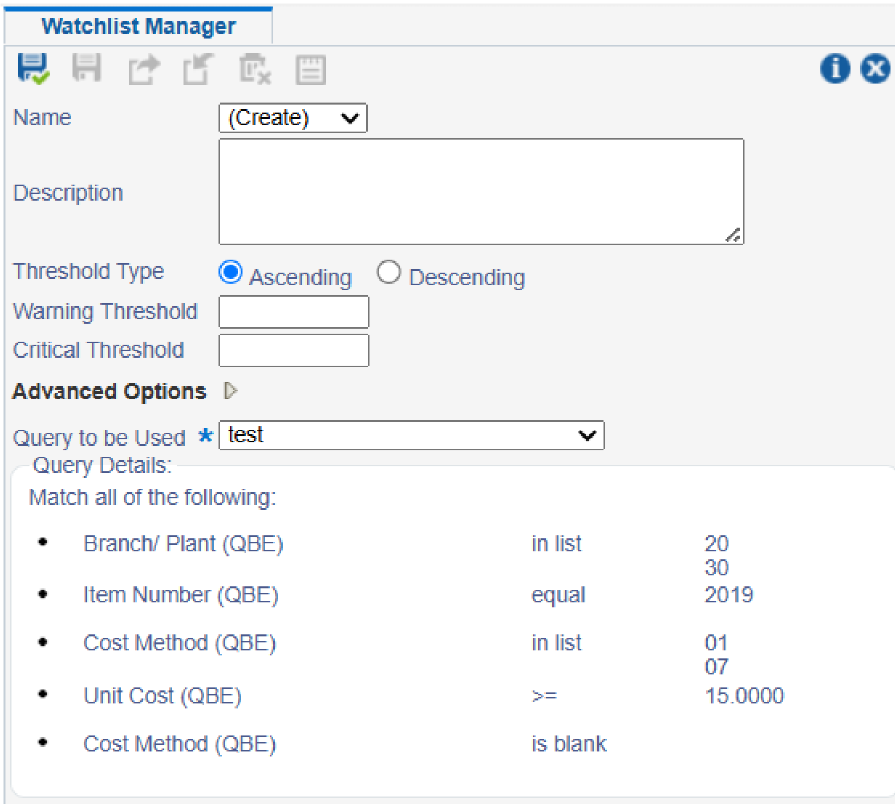
Build a query and select these two fields. If you have entered QBE previously it automatically populates that field. Save the query with a unique recognizable name.



In this example, 01 is treated as last year cost data. (demo system). In real life you give a cost method name like 4A, 5A etc. for 2024/2025. You can also use item category codes instead of listing few items

Step 4

Create a watchlist for this query, give the same name



Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage

Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to the all records option if you feel the watchlist extract is incorrect.

NOTE: This inquiry has many other fields like item category codes, ABC codes, etc. which could be used instead of listing your few products or components.

12. Zero Price Items Alert

Functional Area	Distribution
Number	12
Title	Zero Price Items Alert
Description	New Fiscal or calendar year, new price list uploaded. Users make errors in picking right SKUs or price levels. Need an alert!
Purpose	Get alerts on key price items
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

Zero Price Items Alert

Business Requirement:

You are in a fast moving product manufacturing/selling environment. The products gets designed and sales ordered entered quickly to get into the market. Marketing and sales has not yet provided the price list. Sales orders gets into execution and zero invoices goes to the customer! Checking discrepancy or zero prices are very important in those situations. Especially important if such price changes happen every quarter or more frequent within a year.

If you are in PDM group and/or in Costing group, you need to use this watchlist and get alerts promptly. This is very critical on short cycle time manufactured products in a high NPI (new product introductions) environment.

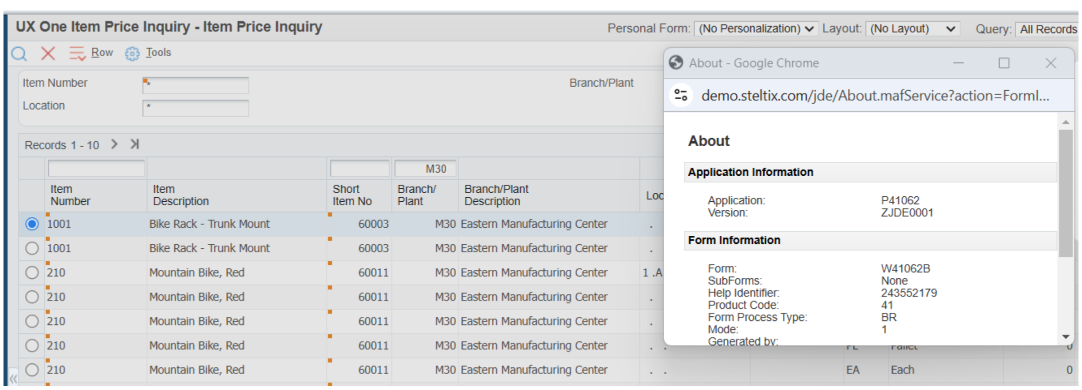
Technology used: UDO watchlist.

Limitations: Ensure you have security access to run this application

Table/Application Used: P41062

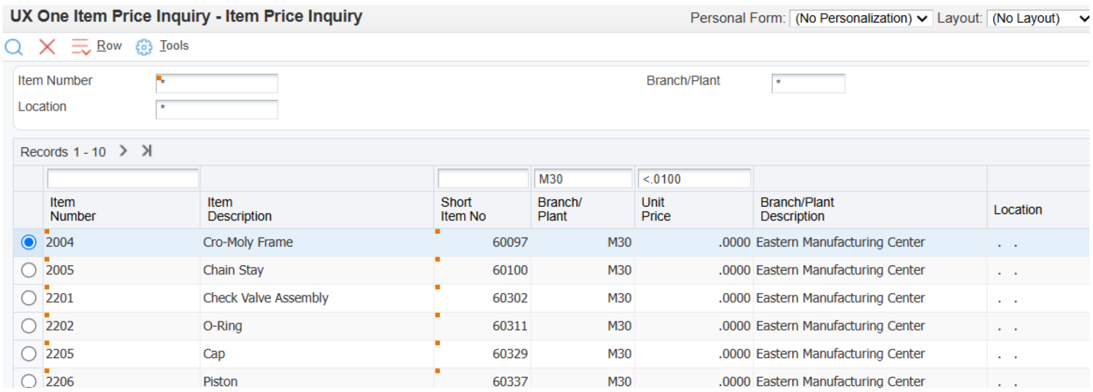
Step 1

Open UX one price inquiry application



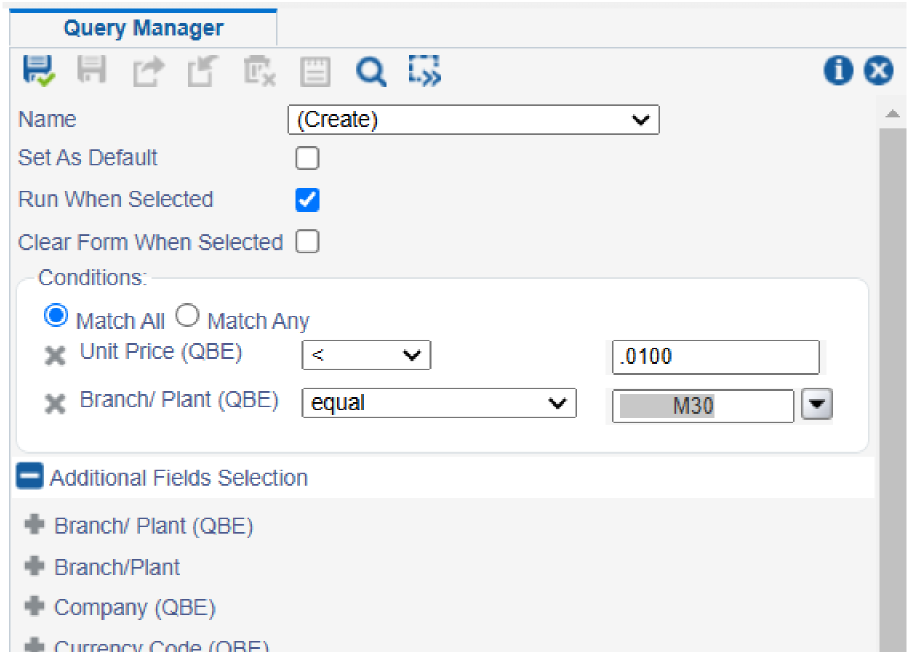
Step 2

Enter your branch and place >0.01 in unit price field. Make grid customization to hide unwanted fields.



Step 3

Build a query and select these two fields. If you have entered QBE previously it automatically populates that field. Save the query with a unique recognizable name.



Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage

Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to the all records option if you feel the watchlist extract is incorrect.

NOTE: This inquiry has many other fields like item category codes, ABC codes, etc. which could be used instead of listing your few products. As Pricing manager, you could have another watchlist for all products above $25000 (as an example) price value. If you could export that data before you reload the current prices, this will help to quickly do data analysis to compare pricing patterns.

13. Blanket Order Usage Alert

Functional Area	Distribution
Number	13
Title	Blanket Order Usage Alert
Description	New Fiscal or calendar year, new supply & demand scenarios. You need to know your blanket orders usage before the start of the price negotiations. Need an alert!
Purpose	Get alerts on key price/performance items
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

Blanket Order Usage Alert

Business Requirement:

Your organization uses blanket purchase orders extensively. The purchase order line releases happen in a stand-alone application and/or as a part of the MRP purchase order release application. You need to know the material coverage periodically to decide on the review of your material budgets. Also you want to know pro-actively if any such blanket order are nearing full usage (price negotiation point) or never used to the full extent (again price negotiation point).

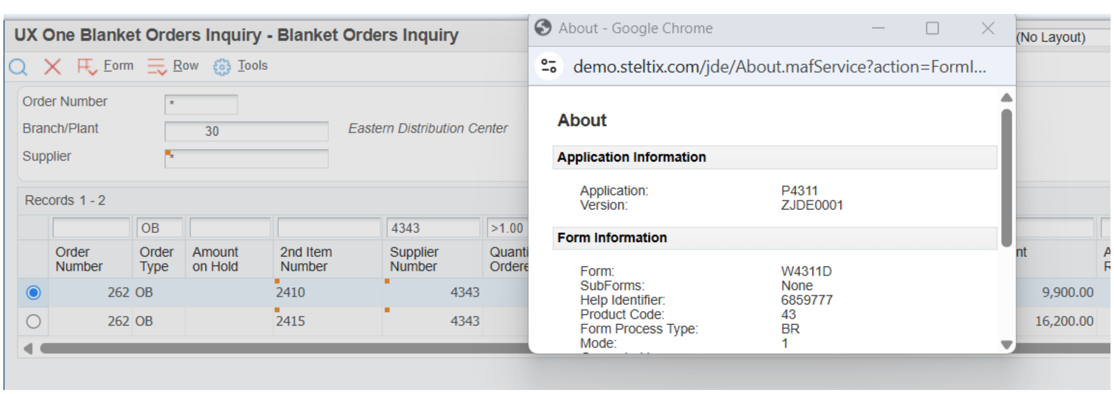
Technology used: Blanket order inquiry UxOne

Limitations: None. Please check security granted to right roles

Table/Application Used: P4311

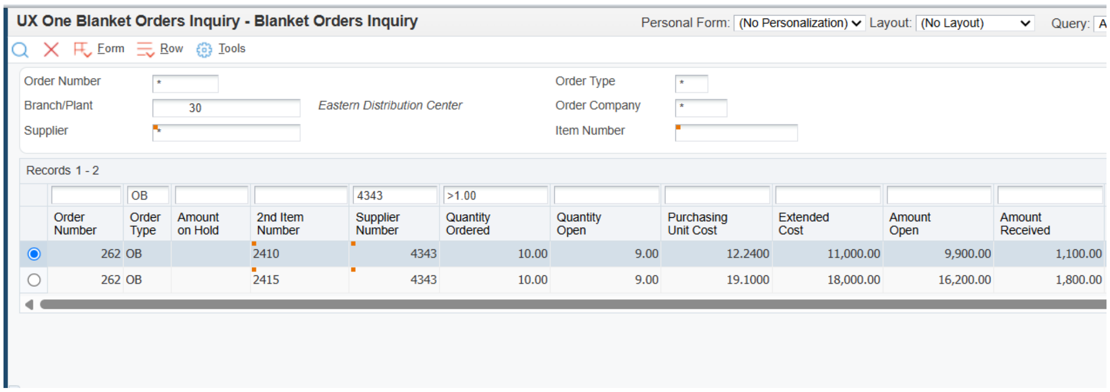
Step 1

Open this application from your menu. If it does not exists, ask IT to deploy to your security role. You will be testing this in non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



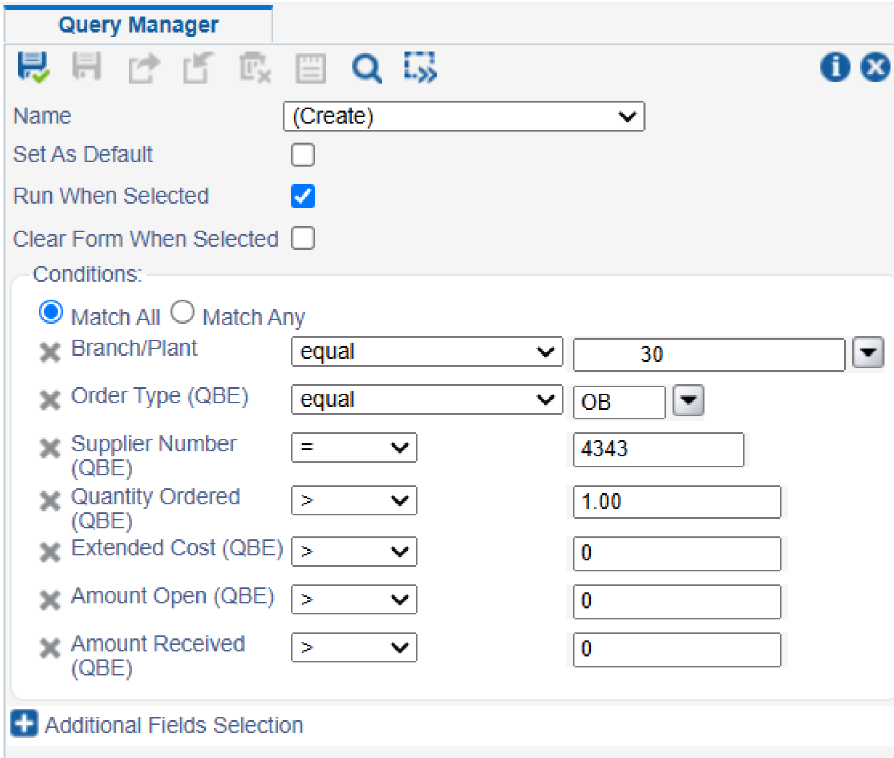
Step 2

Customize the grid (example below), place some QBE values to get valid data points



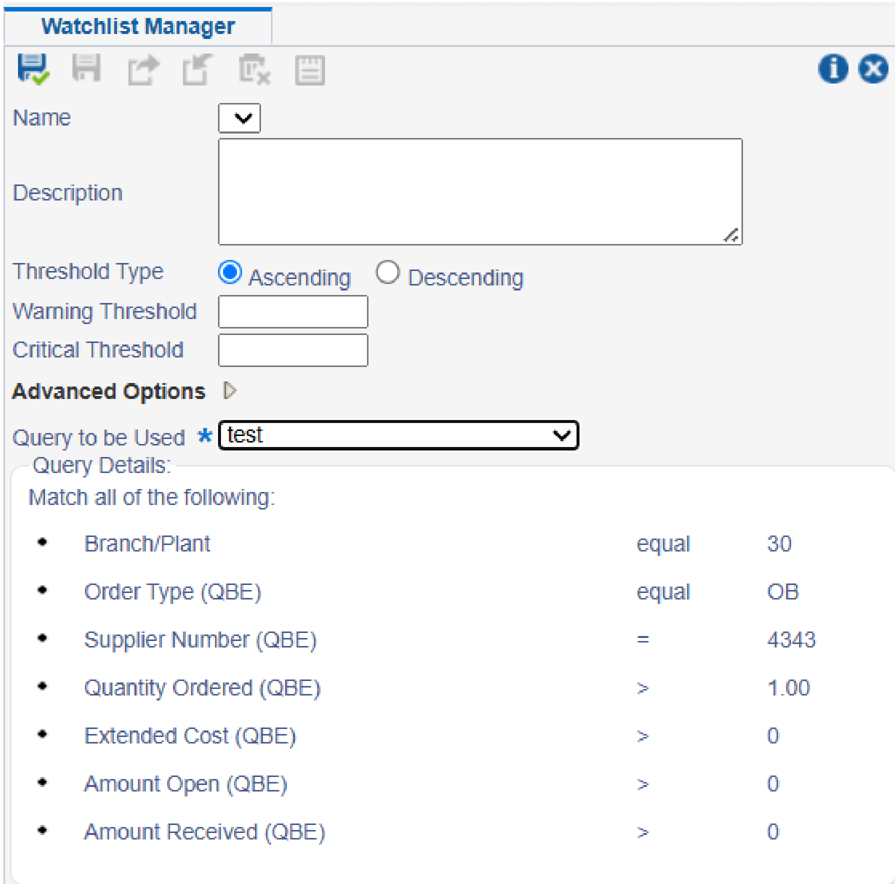
Step 3

Create a new query. Use the right pane selections to start with. Branch plant, order type, qty ordered, etc. Save the query with a unique understandable name



Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the oneview sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to the all records option if you feel the watchlist extract is incorrect.

NOTE: Currently watchlist queries does not have user-enabled calculations and/or compare one field value to another. You have to export the data and build your own excel VLOOKUP rules to get exceptions or blanket order usage data points.

14. Purchase Order Overdue Alert

Functional Area	Distribution
Number	14
Title	Purchase Order Overdue Alert
Description	You can't review S&OP metrics without knowing PO overdue
Purpose	Get alerts on key purchasing items
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

Purchase Order Overdue Alert

Business Requirement:

One way of looking at purchase order overdue is from the MRP T messages. But using Ux One application is more powerful, especially if you are not using MRP functionality.

You can build your own query where no quantity has been received yet on the purchase orders and they are overdue. If some or partial quantity has been received then use PO delayed alert watchlist. Since partial quantity means change in demand

and/or problems at the supplier end. That require different approach to solve the problems!

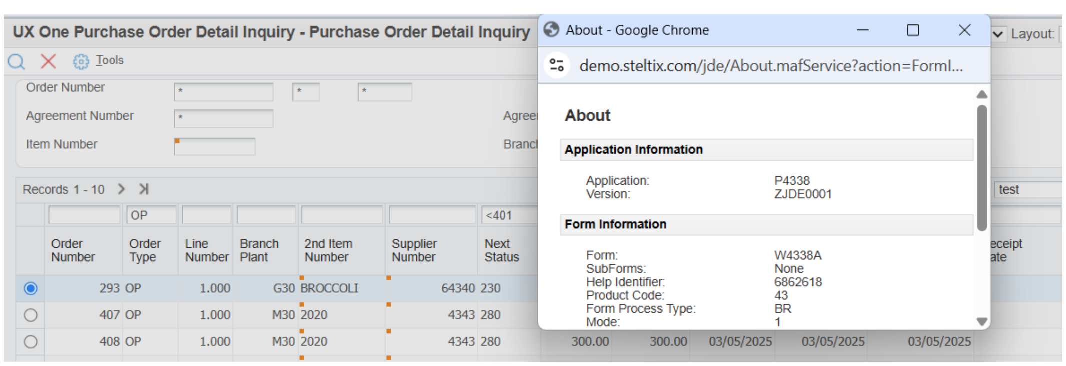
Technology used: Ux One Purchase order detail inquiry

Limitations: None. Please check security granted to right roles, these are UX One applications. Regular PO entry applicable may be possible if you add grid extension fields.

Table/Application Used: P4338

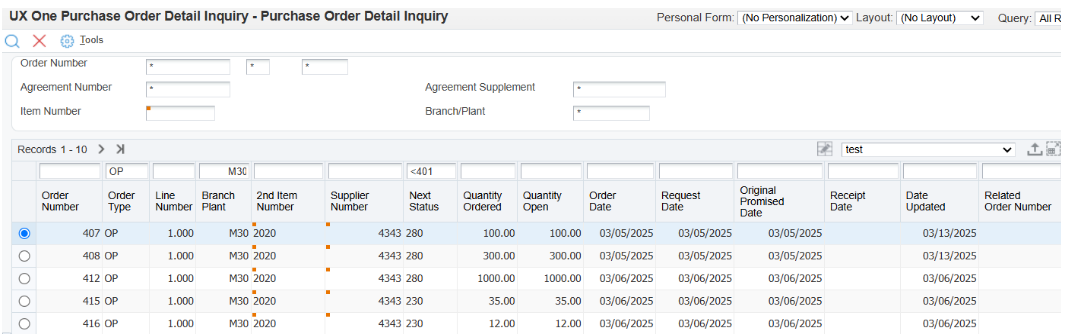
Step 1

Open this application from your menu. If it does not exists, ask IT to deploy to your security role. You will be testing this in non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



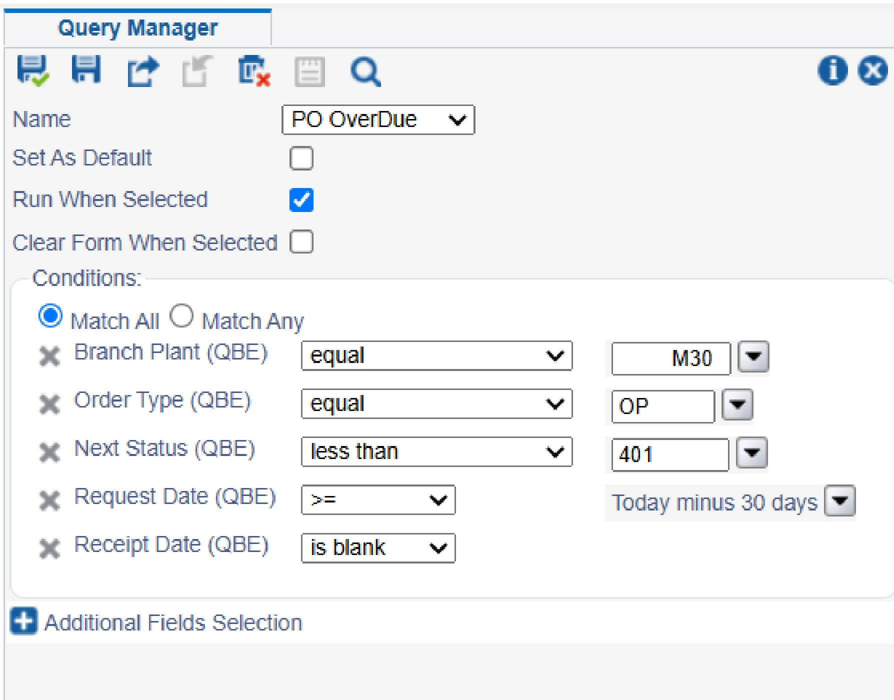
Step 2

Customize the grid (example below), place some QBE values to get valid data points



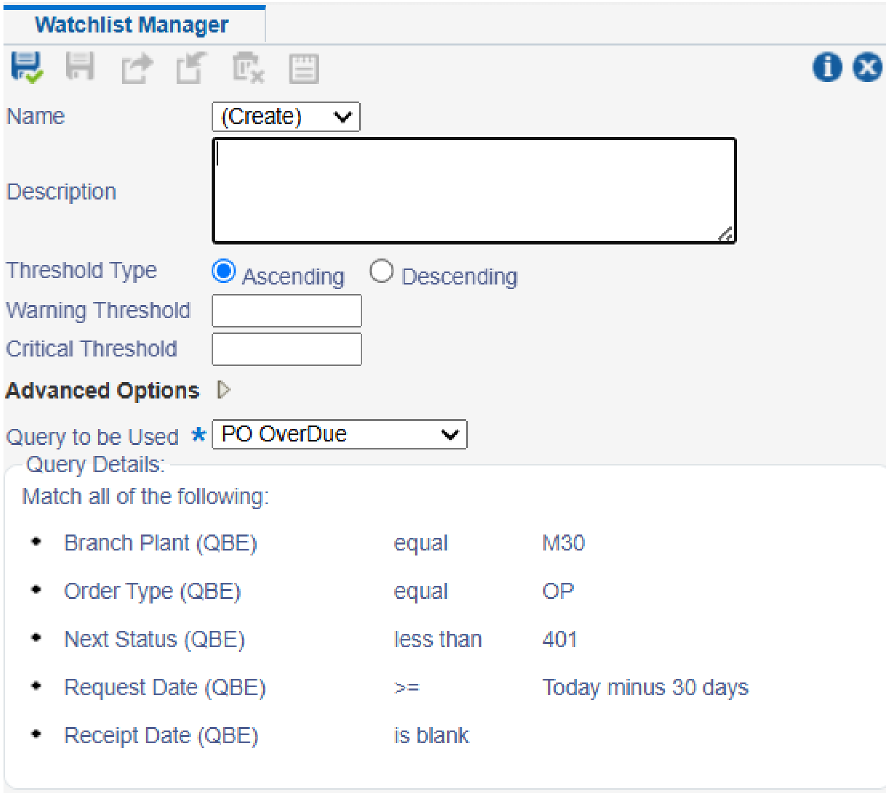
Step 3

Create a new query. Use the right pane selections to start with. Branch plant, order type, next status (<401 in this example), request date >today minus 30 days (as example). Save the query with a unique understandable name



Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the oneview sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to the all records option if you feel the watchlist extract is incorrect.

NOTE: Make variations to the request date filter if even few days late means a lot in your business. You can add another field for vendor number to filter out consistently poor performing vendors. There are tools like supplier performance application which shows analysis on date, quantity, etc. for your scorecards.

15. Purchase Order delayed Alert

Functional Area	Distribution
Number	15
Title	Purchase Order delayed Alert
Description	You can't review S&OP metrics without knowing PO overdue
Purpose	Get alerts on key purchasing items
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

Purchase Order delayed Alert

Business Requirement:

One way of looking at purchase order overdue is from the MRP T messages. But using Ux One application is more powerful, especially if you are not using MRP functionality.

You can build your own query where no quantity has been received yet on the purchase orders and they are overdue. If some or partial quantity has been received then use PO delayed alert watchlist. Since partial quantity means change in demand and/or problems at the supplier end. That require different approach to solve the problems!

Technology used: Ux One Purchase order detail inquiry

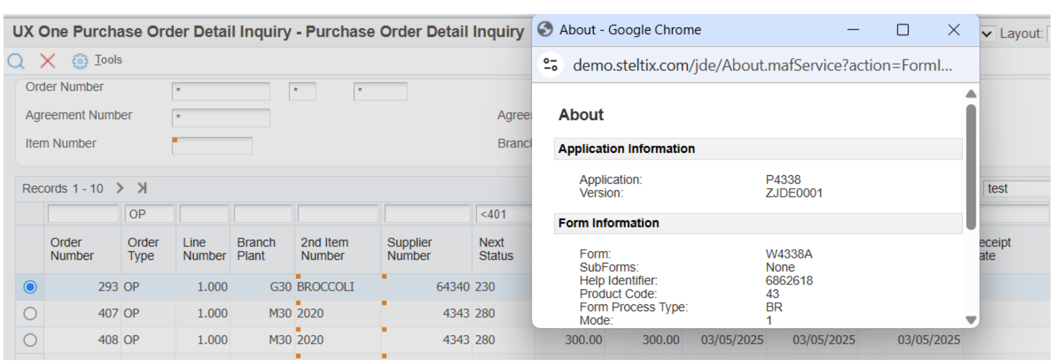
Limitations: None. Please check security granted to right roles, these are UX One applications. Regular PO entry applicable may be possible if you add grid extension fields.

Limitations: None. Please check security granted to right roles

Table/Application Used: P4338

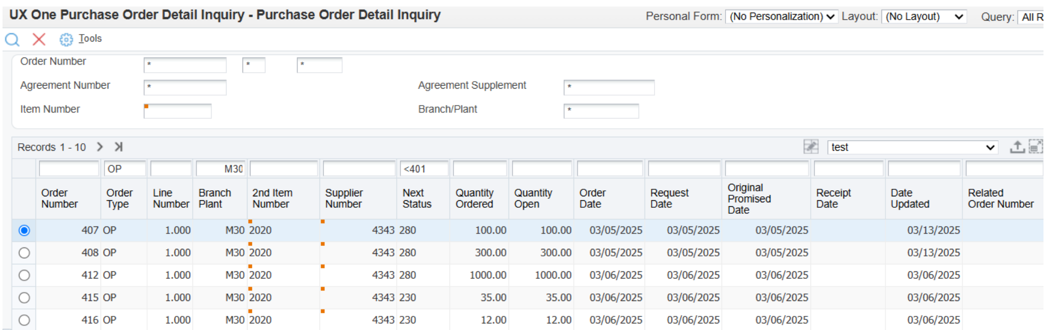
Step 1

Open this application from your menu. If it does not exists, ask IT to deploy to your security role. You will be testing this in non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



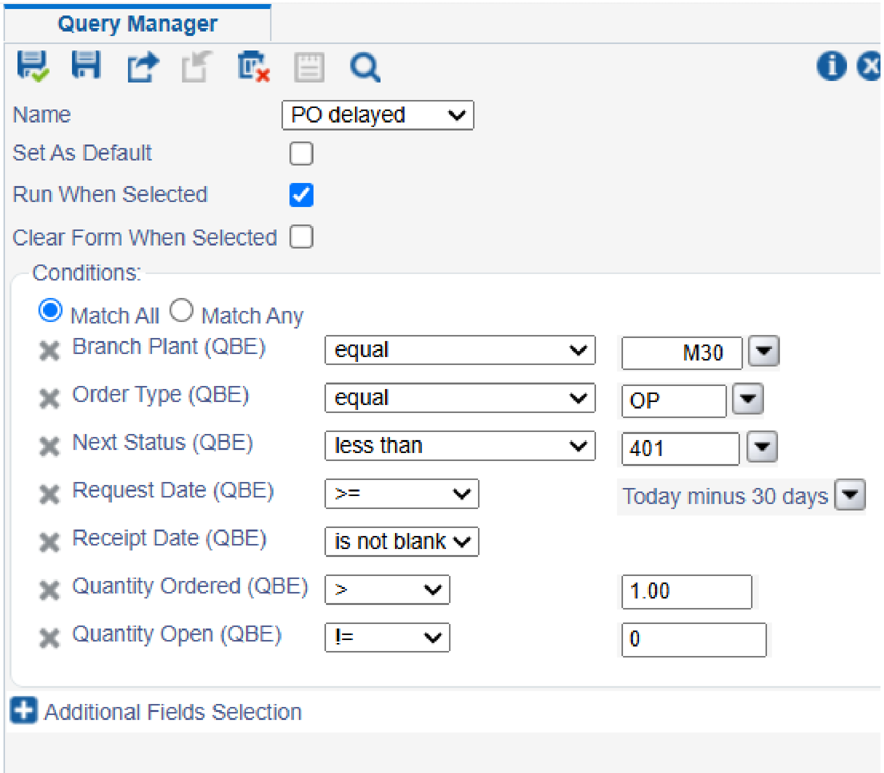
Step 2

Customize the grid (example below), place some QBE values to get valid data points



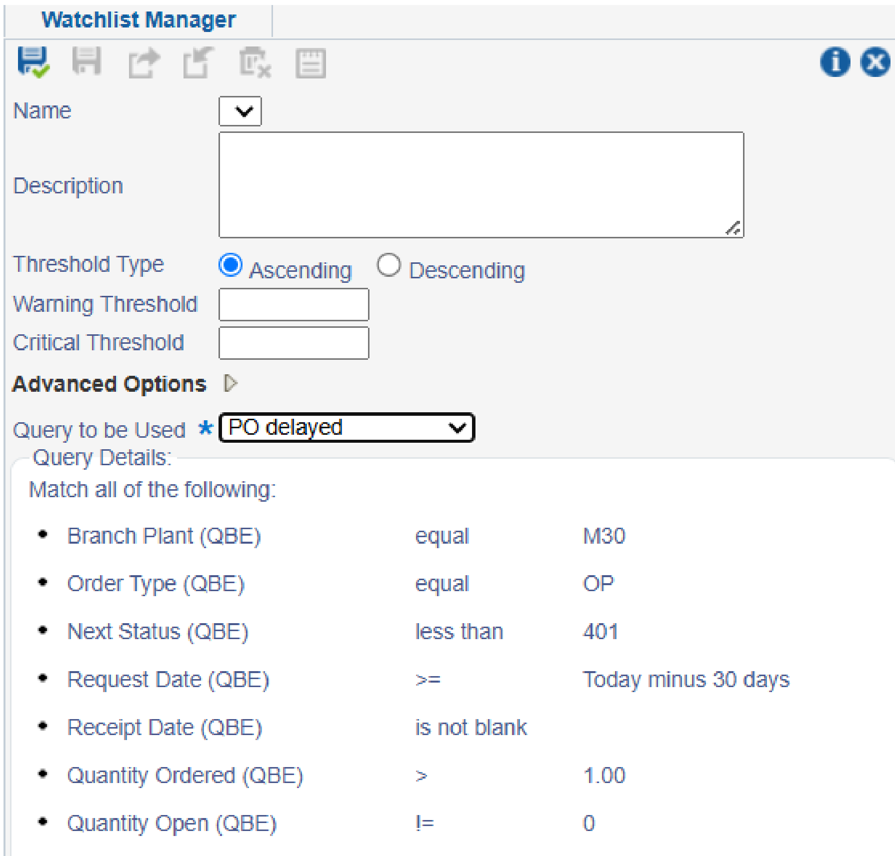
Step 3

Create a new query. Use the right pane selections to start with. Branch plant, order type, next status (<401 in this example), request date > today minus 30 days (as example). Save the query with a unique understandable name



Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the oneview sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to the all records option if you feel the watchlist extract is incorrect.

NOTE: Make variations to the request date filter if even few days late means a lot in your business. You can add another field for vendor number to filter out consistently poor performing vendors. There are tools like supplier performance application which shows analysis on date, quantity, etc. for your scorecards.

16. Purchase Order Not Closed Age Analysis Alert

Functional Area	Distribution
Number	16
Title	Purchase Order Not Closed Age Analysis Alert
Description	It is always a best practice to close left over purchase orders which are not going to be received in the future. Helps the MRP
Purpose	Get alerts on key purchasing items
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

Purchase Order Not Closed Age Analysis Alert

Business Requirement:

One way of looking at purchase order overdue is from the MRP T messages. But using Ux One application is more powerful, especially if you are not using MRP functionality.

Many times, the purchase orders have residual quantities left especially if you are in two or more decimals PO quantity environment. Rounding off may result in fractional quantity left open. MRP may show as past due messages with a fractional quantity. Buyers need to close those order lines as a part of housekeeping exercise. Or receiving department need to receive them as ‘receive & close’ option. But this communication is not that straight forward since sometime you may want to re-use the same purchase order later.

Technology used: Ux One Purchase order detail inquiry

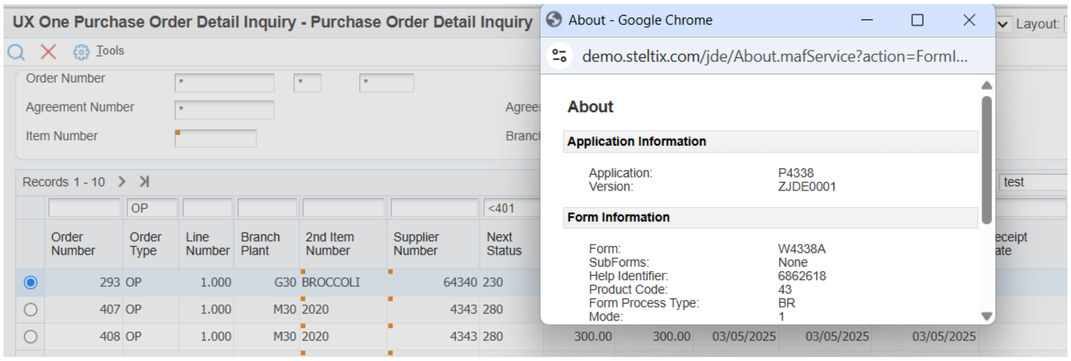
Limitations: None. Please check security granted to right roles, these are UX One applications. Regular PO entry applicable may be possible if you add grid extension fields.

Limitations: None. Please check security granted to right roles

Table/Application Used: P4338

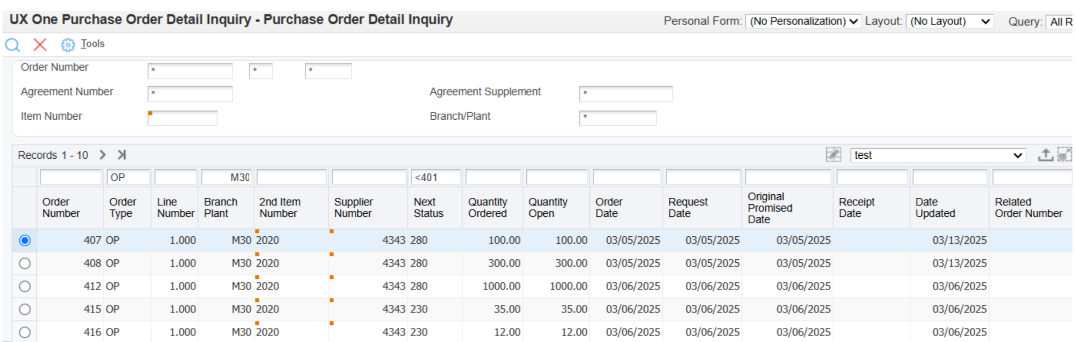
Step 1

Open this application from your menu. If it does not exists, ask IT to deploy to your security role. You will be testing this in non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



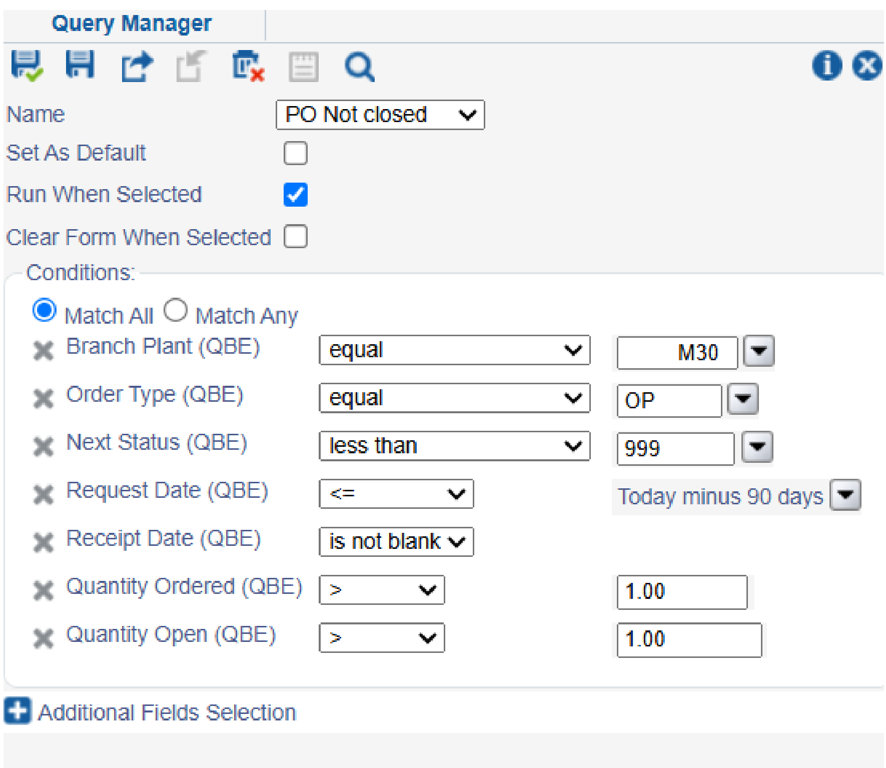
Step 2

Customize the grid (example below), place some QBE values to get valid data points



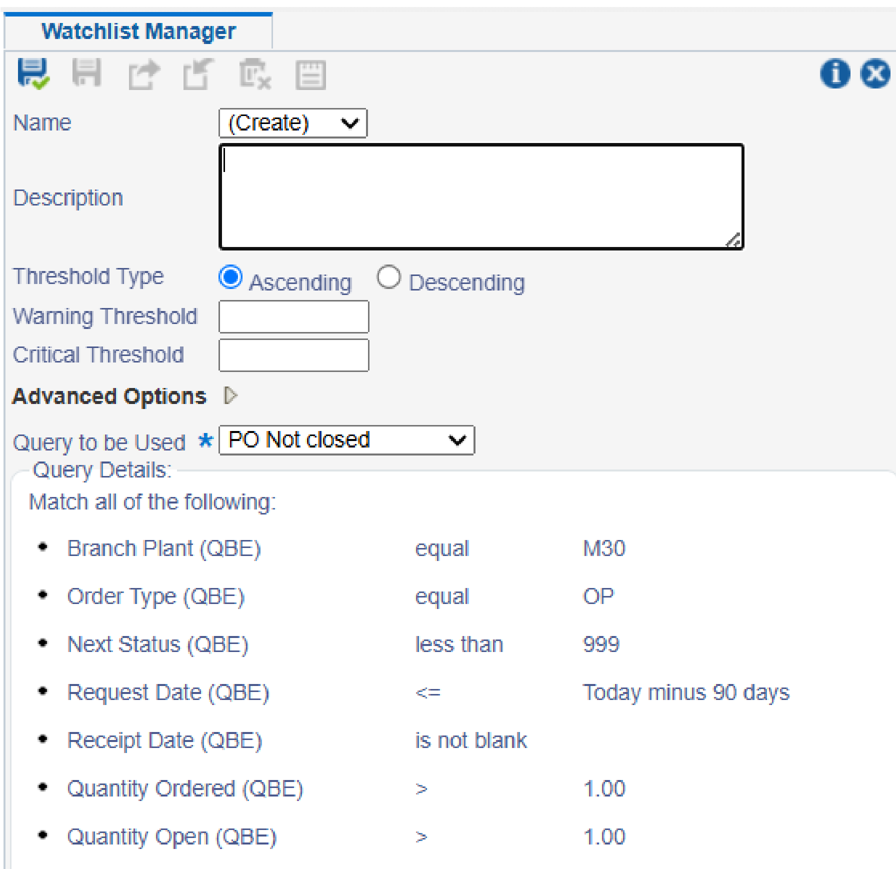
Step 3

Create a new query. Use the right pane selections to start with. Branch plant, order type, next status (<999 in this example), request date < today minus 90 days (as example). Save the query with a unique understandable name



Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the oneview sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to the all records option if you feel the watchlist extract is incorrect.

NOTE: You can fine-tune the above query with qty open > 0.01 in a decimal place environment. Use request date or order date as applicable. Even the next status could be above 400. The idea is to close purchase orders as quickly as they are received. Otherwise, user error could end up receiving more on the past purchase orders triggering tolerance alerts and price discrepancies. That will pose more discussions with suppliers and your AP team later!

17. Supplier $ performance, discounts Alert

Functional Area	Distribution
Number	17
Title	Supplier $ performance, discounts Alert
Description	Are you losing money or saving money. Cash is king!
Purpose	Get alerts on key purchasing items
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

Supplier $ performance, discounts Alert

Business Requirement:

As a purchasing manager or lead you need to know how your key suppliers perform financially. How much they have invoiced in that year and how much they have gained in price discount (if you are using pricing groups and discount through purchase agreements). This data will help in purchase price negotiations and/or re-defining the price bundles/scales.

Technology used: One view supplier ledger inquiry

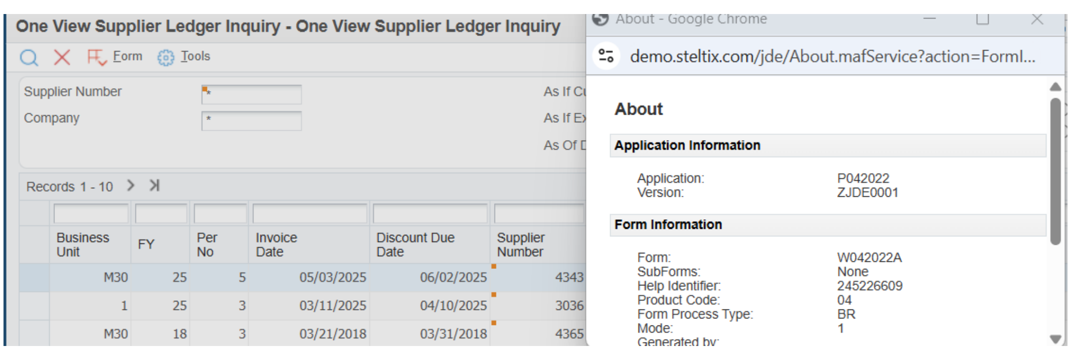
Limitations: None. Please check security granted to right roles, these are one view inquiry applications. 04 means AP, but you are only looking vendor performance dollar wise in a year and the discounts availed. AP team lead can run this inquiry but a watchlist for purchasing will help immensely.

Limitations: None. Please check security granted to right roles

Table/Application Used: P042022

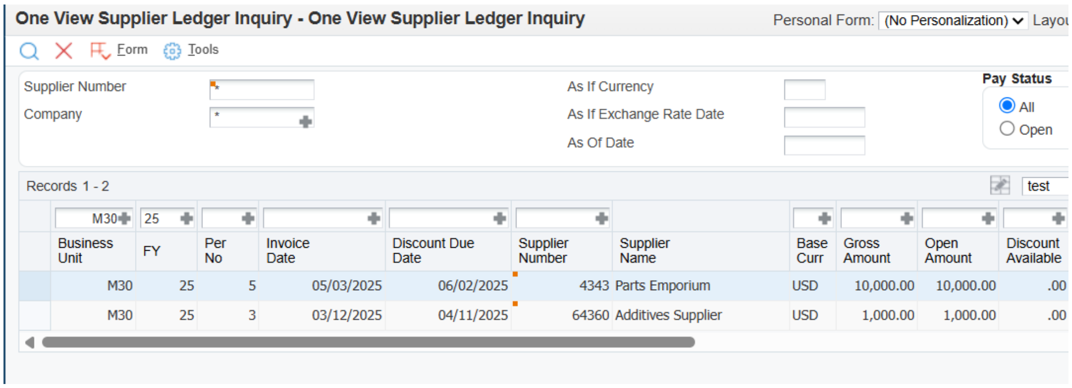
Step 1

Open this application from your menu. If it does not exists, ask IT to deploy to your security role. You will be testing this in non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



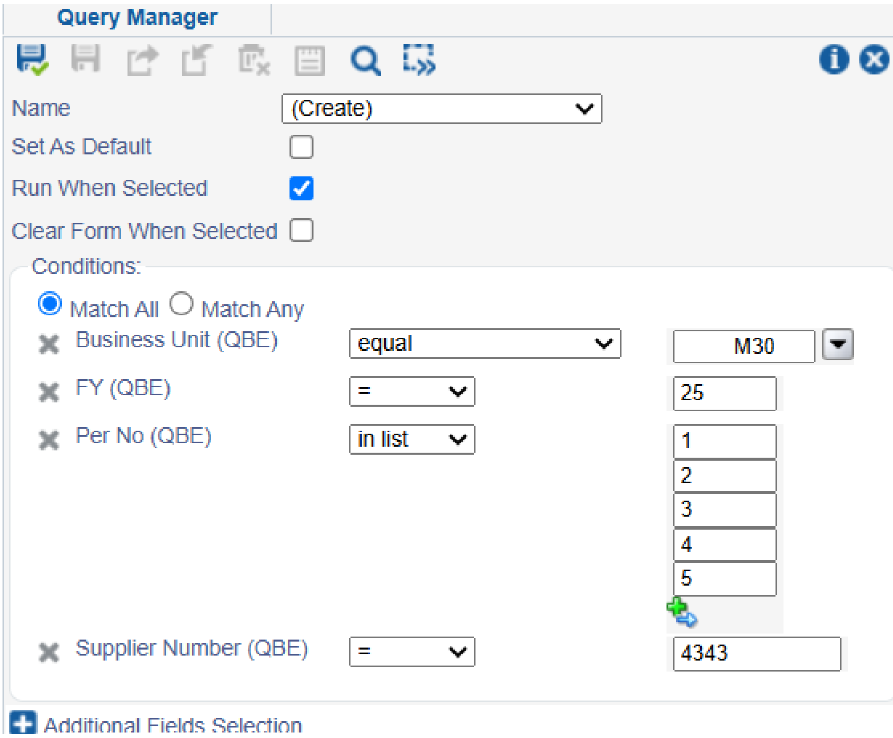
Step 2

Customize the grid (example below), place some QBE values to get valid data points



Step 3

Create a new query. Use the right pane selections to start with. Branch plant, fiscal year, period (enter 1 to 12 in the list), supplier number (4343 in this example), etc. You may enter future years in the FY field to avoid making changes every year to this watchlist. Same with multiple vendors, whom you think are important to your business. Save the query with a unique understandable name



Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage

Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the oneview sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to the all records option if you feel the watchlist extract is incorrect.

18. Customer $ performance, Aging Alert

Functional Area	Distribution
Number	18
Title	Customer $ performance, Aging Alert
Description	Are you losing money or saving money. Cash is king!
Purpose	Get alerts on key sales items & customers
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

Customer $ performance, Aging Alert

Business Requirement:

Like supplier side, you as a customer service manager or power user or lead need to know how your key customers perform financially. How much they have business in that year and how much they have gained in price discount (if you are using pricing groups and discount through customer agreements). This data will help in sale price negotiations and/or re-defining the price bundles/scales. This inquiry comes with the aging analysis as well.

Technology used: One view customer ledger inquiry

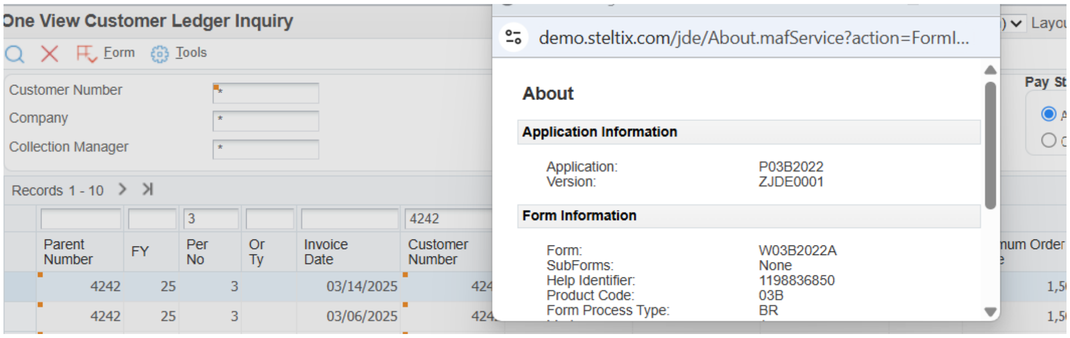
Limitations: None. Please check security granted to right roles, these are one view inquiry applications. 03 means AR, but you are only looking vendor performance dollar wise in a year and the discounts availed. AP team lead can run this inquiry but a watchlist for purchasing will help immensely.

Limitations: None. Please check security granted to right roles

Table/Application Used: P03B2022

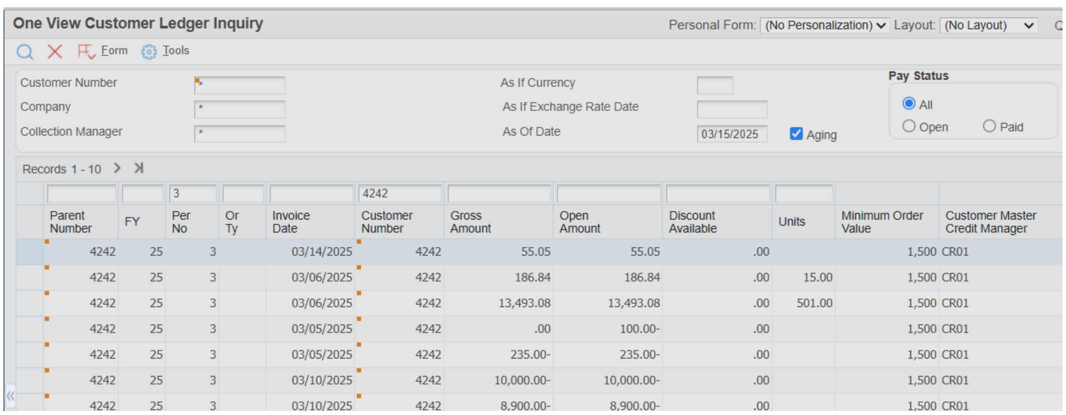
Step 1

Open this application from your menu. If it does not exists, ask IT to deploy to your security role. You will be testing this in non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists

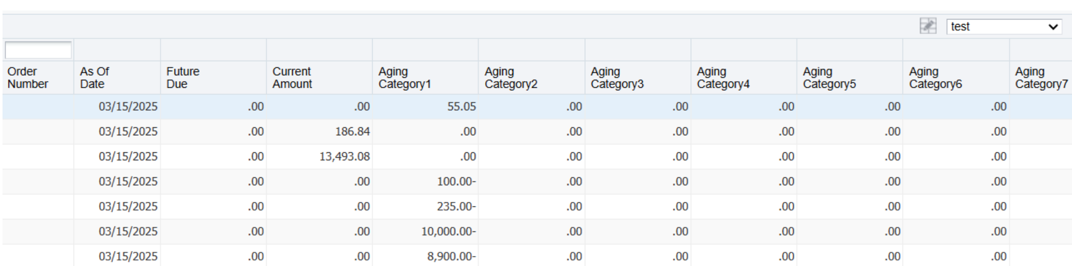


Step 2

Customize the grid (example below), place some QBE values to get valid data points



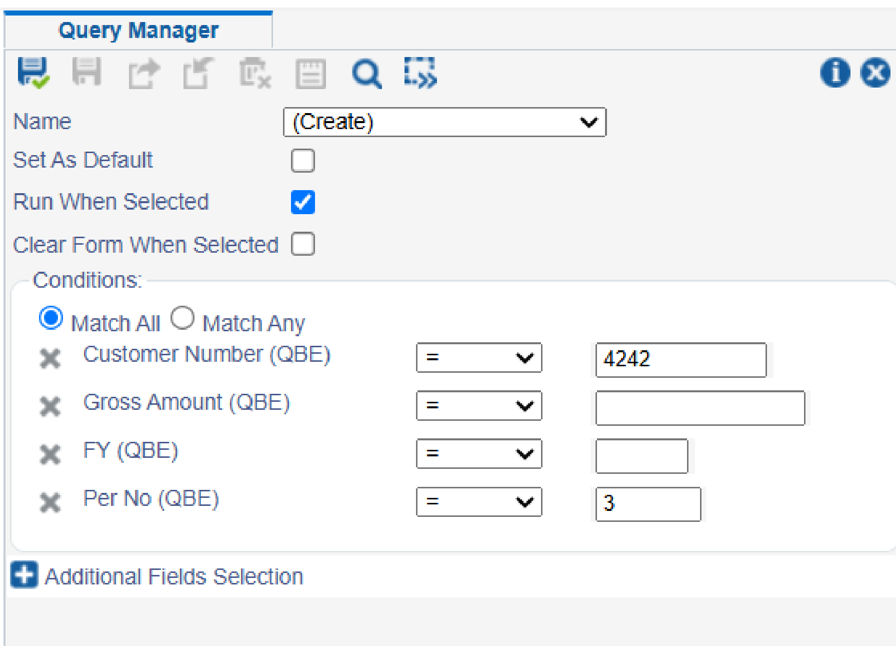
Parent Number	FY	Per No	Or Ty	Invoice Date	Customer Number	Gross Amount	Open Amount	Discount Available	Units	Minimum Order Value	Customer Master Credit Manager
		3			4242						
4242	25	3		03/14/2025	4242	55.05	55.05	.00		1,500	CR01
4242	25	3		03/06/2025	4242	186.84	186.84	.00	15.00	1,500	CR01
4242	25	3		03/06/2025	4242	13,493.08	13,493.08	.00	501.00	1,500	CR01
4242	25	3		03/05/2025	4242	.00	100.00-	.00		1,500	CR01
4242	25	3		03/05/2025	4242	235.00-	235.00-	.00		1,500	CR01
4242	25	3		03/10/2025	4242	10,000.00-	10,000.00-	.00		1,500	CR01
4242	25	3		03/10/2025	4242	8,900.00-	8,900.00-	.00		1,500	CR01



Order Number	As Of Date	Future Due	Current Amount	Aging Category1	Aging Category2	Aging Category3	Aging Category4	Aging Category5	Aging Category6	Aging Category7
	03/15/2025	.00	.00	55.05	.00	.00	.00	.00	.00	
	03/15/2025	.00	186.84	.00	.00	.00	.00	.00	.00	
	03/15/2025	.00	13,493.08	.00	.00	.00	.00	.00	.00	
	03/15/2025	.00	.00	100.00-	.00	.00	.00	.00	.00	
	03/15/2025	.00	.00	235.00-	.00	.00	.00	.00	.00	
	03/15/2025	.00	.00	10,000.00-	.00	.00	.00	.00	.00	
	03/15/2025	.00	.00	8,900.00-	.00	.00	.00	.00	.00	

Step 3

Create a new query. Use the right pane selections to start with. Some easy filters shown below. Please expand based on your business needs. Use list in the FY and Period number, to enter multiple data points.



Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage

Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the oneview sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to the all records option if you feel the watchlist extract is incorrect.

19. Re-Order Point Alert

Functional Area	Distribution
Number	19
Title	Re-Order Point Alert
Description	No one wants surprise item shortages!
Purpose	Get alerts on key inventory items. PO generator application helps indirectly as well
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

Re-Order Point Alert

Business Requirement:

Outside MRP, JDE has the tool PO Generator. If the item branch planning values are not set to MRP but with re-order quantity and re-order levels, system can consolidate and generate purchase orders for those items. This application gives basic inquiry view on the list of items against a vendor ready for purchase order generation. Buyers need not use this inquiry every day, but use the watchlist if their vendor/item has come into reorder point level. PO Generator has limitation for one supplier field but you can use it for reorder point item and/or all items pertaining to the supplier.

Technology used: PO Generator

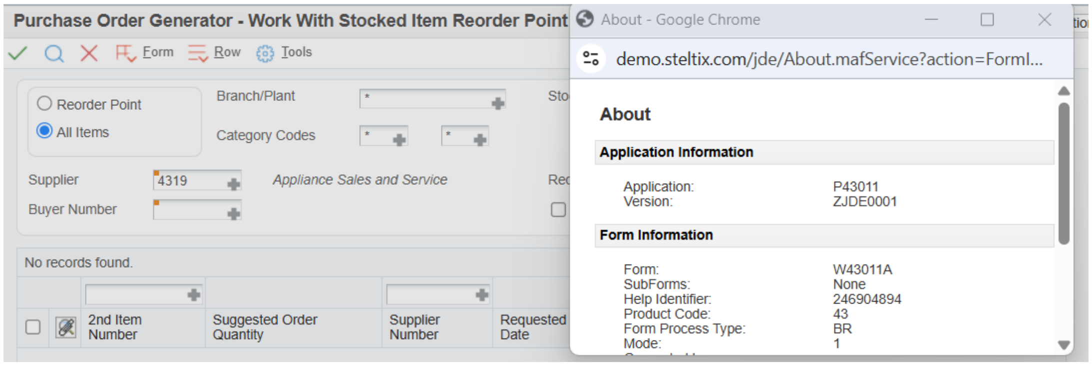
Limitations: None. This tool is used for non-MRP items. Reorder point levels and quantity need to be defined in item branch records. Order policy code should not be MRP.

Limitations: None. Please check security granted to right roles

Table/Application Used: P43011

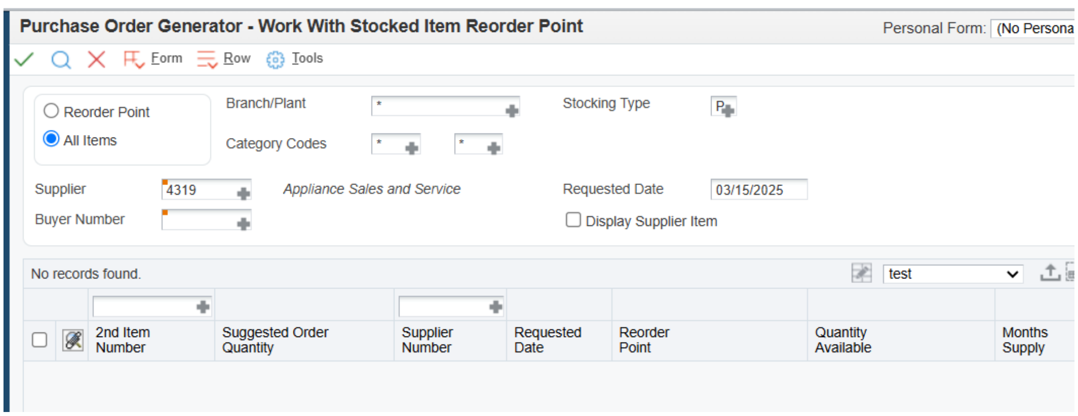
Step 1

Open this application from your menu. If it does not exists, ask IT to deploy to your security role. You will be testing this in non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



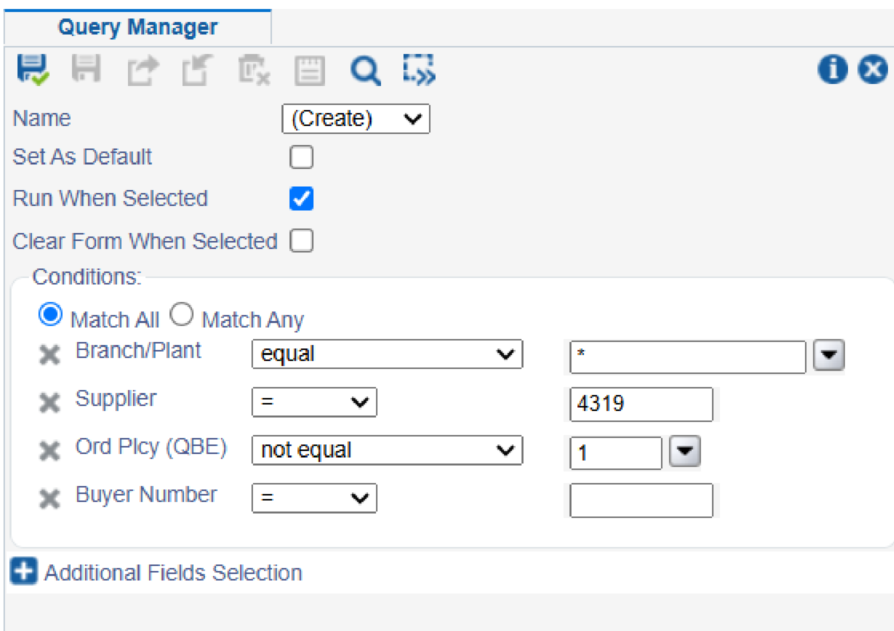
Step 2

Customize the grid (example below), place some QBE values to get valid data points. You may need grid extension to get additional fields



Step 3

Create a new query. Use the right pane selections to start with. Some easy filters shown below. Please expand based on your business needs. Do not user buyer number if the buyers change all the time. Or use generic buyer number for product groupings, so that it will not distract personnel changes.



Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage

Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the oneview sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to the all records option if you feel the watchlist extract is incorrect.

20. Purchase Approvals pending Alert

Functional Area	Distribution
Number	20
Title	Purchase Approvals pending Alert
Description	No one wants surprise item shortages! If you didn't release POs due to approvers vacation or delays, but the bucks stop at one point.
Purpose	Get alerts on key inventory items. PO generator application helps indirectly as well
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

Purchase Approvals pending Alert

Business Requirement:

In a multi-level purchase order approval process system, originator or buyers start the approval process. It goes to department head, division head and then to other senior level executives. System sends email notification to senior level executives and there are also mobile approval tools.

If there are in approval delays, the end user or power user need to know where the approval is struck. This watch list helps in doing the aging analysis.

Technology used: Orders Awaiting Approval

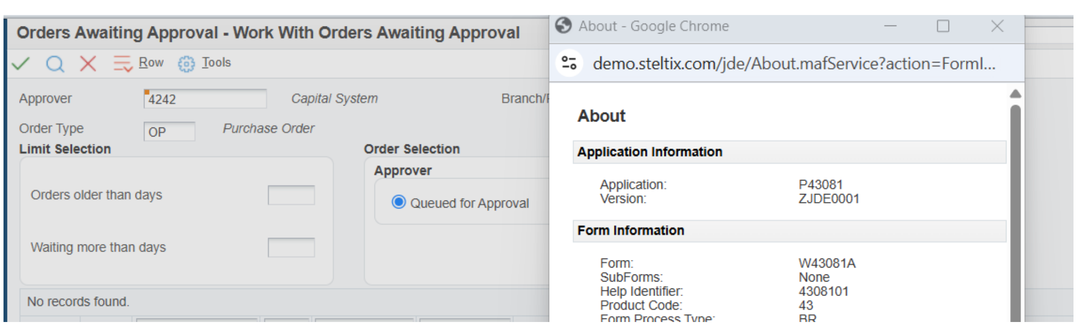
Limitations: None. Please check security granted to right roles, these are inquiry application and not exactly approval application

Limitations: None. Please check security granted to right roles

Table/Application Used: P43081

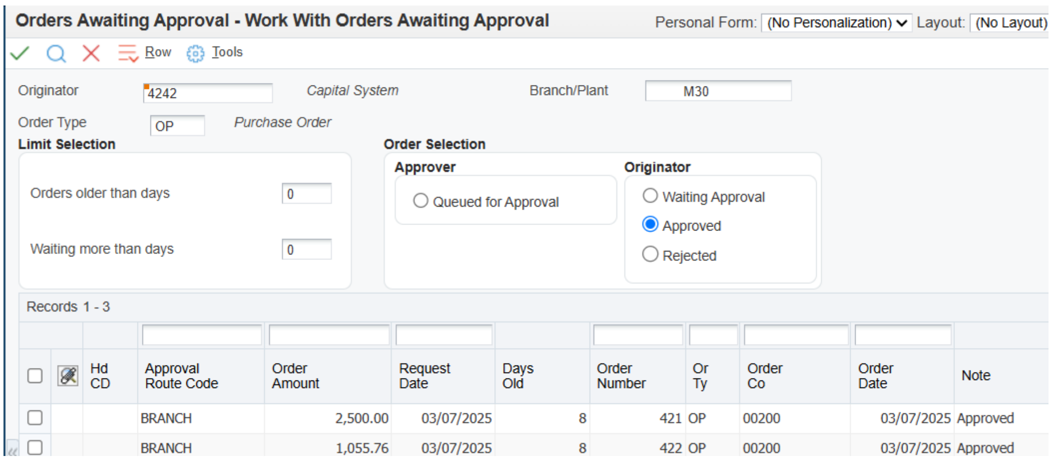
Step 1

Open this application from your menu. If it does not exists, ask IT to deploy to your security role. You will be testing this in non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2

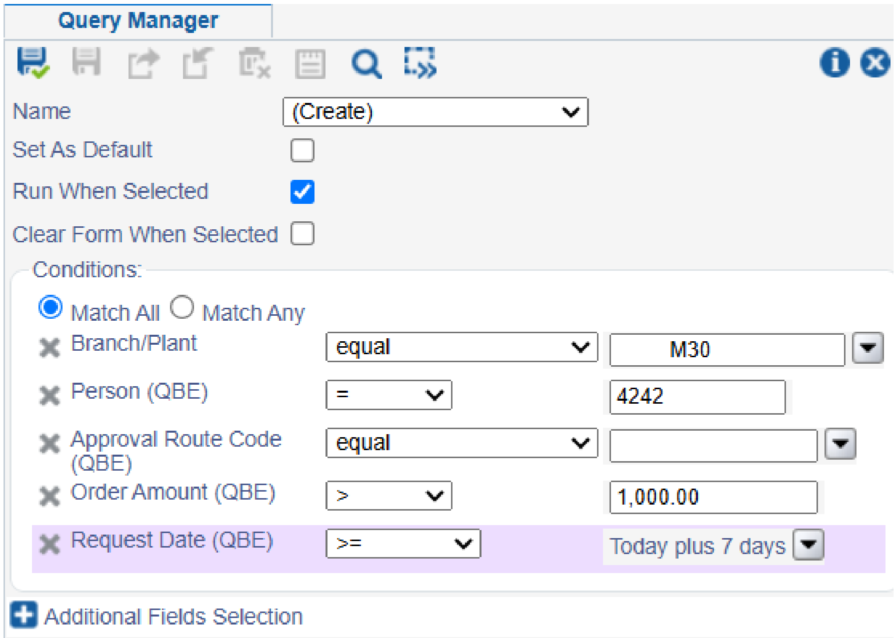
Customize the grid (example below), place some QBE values to get valid data points


Orders Awaiting Approval - Work With Orders Awaiting Approval
Personal Form: (No Personalization) Layout: (No Layout)
Row Tools
Originator 4242 Capital System
Branch/Plant M30
Order Type OP Purchase Order
Limit Selection
Orders older than days 0
Waiting more than days 0
Order Selection
Approver
Queued for Approval
Originator
Waiting Approval
Approved
Rejected
Records 1 - 3

Hd CD	Approval Route Code	Order Amount	Request Date	Days Old	Order Number	Or Ty	Order Co	Order Date	Note
	BRANCH	2,500.00	03/07/2025	8	421	OP	00200	03/07/2025	Approved
	BRANCH	1,055.76	03/07/2025	8	422	OP	00200	03/07/2025	Approved

Step 3

Create a new query. Use the right pane selections to start with. Some easy filters shown below. Please expand based on your business needs. Use list in the approval person and route codes, to enter multiple data points. Dollar threshold value will help in prioritizing the approval urgency.



Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage

Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the oneview sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to the all records option if you feel the watchlist extract is incorrect.

21. Item Usage Trace Inquiry Alert

Functional Area	Distribution
Number	21
Title	Item Usage Trace Inquiry Alert
Description	Avoid surprise questions raised at S&OP reviews on items going redundant.
Purpose	Get alerts on key inventory items. Helps to replace obsolete items with new ones.
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

Item Usage Trace Inquiry Alert

Business Requirement:

Most often asked question in the management review and/or S&OP meetings: how are we covered on certain key fast moving products and based on the past usage per month? You can run reports or come prepared with the questions. However there is a real-time one view inquiry available to get you an alert and you can modify to suit your products, supplier, etc. This view consolidates the data per month which is very useful. And shows what is the current situation in terms of soft/hard commitments.

Technology used: One view Item Usage Trace inquiry

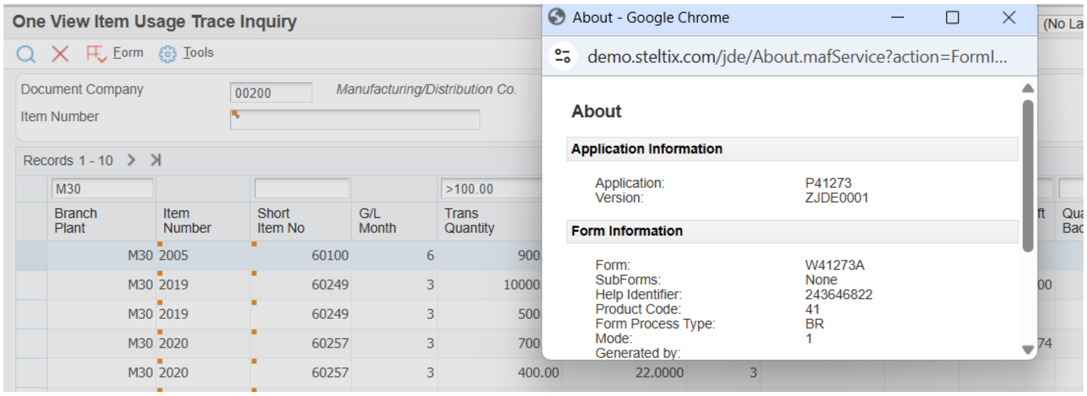
Limitations: None. Please check security granted to right roles, these are one view inquiry applications.

Limitations: None. Please check security granted to right roles

Table/Application Used: P41273

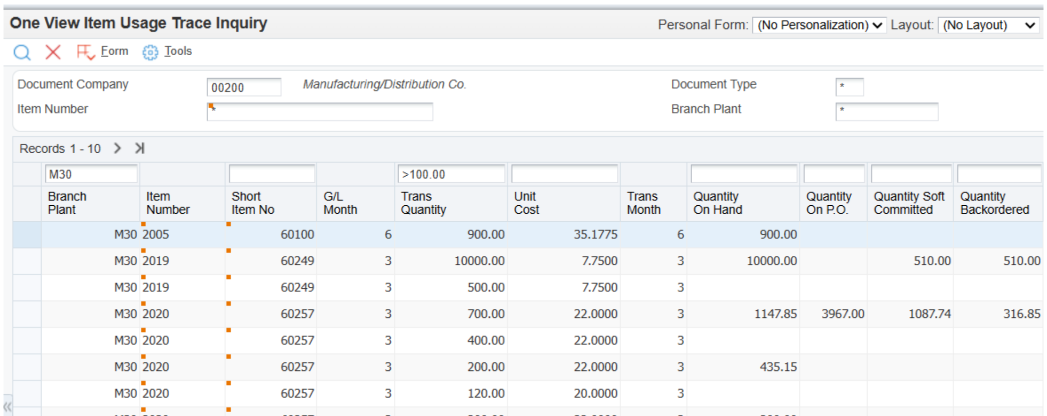
Step 1

Open this application from your menu. If it does not exists, ask IT to deploy to your security role. You will be testing this in non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2

Customize the grid (example below), place some QBE values to get valid data points


One View Item Usage Trace Inquiry

Personal Form: (No Personalization) Layout: (No Layout)

Form Tools

Document Company 00200 *Manufacturing/Distribution Co.* Document Type *

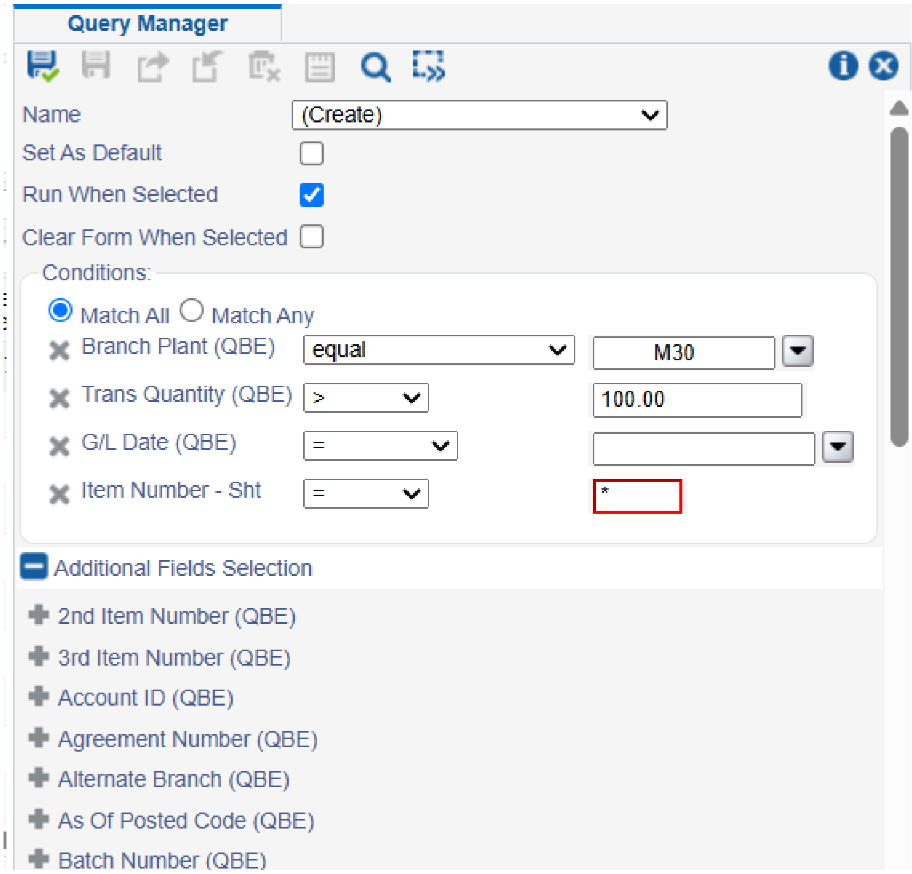
Item Number * Branch Plant *

Records 1 - 10

Branch Plant	Item Number	Short Item No	G/L Month	Trans Quantity	Unit Cost	Trans Month	Quantity On Hand	Quantity On P.O.	Quantity Soft Committed	Quantity Backordered
M30				>100.00						
M30	2005	60100	6	900.00	35.1775	6	900.00			
M30	2019	60249	3	10000.00	7.7500	3	10000.00		510.00	510.00
M30	2019	60249	3	500.00	7.7500	3				
M30	2020	60257	3	700.00	22.0000	3	1147.85	3967.00	1087.74	316.85
M30	2020	60257	3	400.00	22.0000	3				
M30	2020	60257	3	200.00	22.0000	3	435.15			
M30	2020	60257	3	120.00	20.0000	3				
M30	2020	60257	3	200.00	22.0000	3	200.00			

Step 3

Create a new query. Use the right pane selections to start with. Branch plant, transaction qty over certain range, GL date above last year end, item number. This query needs short item number which could be a problem. You may switch over CAFE1 view instead of watchlist on this subject. Or this inquiry could be customized to get the second item number.



Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage

Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the oneview sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to the all records option if you feel the watchlist extract is incorrect.

22. ST/OT Backorder Aging Alert

Functional Area	Distribution
Number	22
Title	ST/OT Backorder Aging Alert
Description	Avoid surprise questions raised at S&OP reviews on items going between branches
Purpose	Get alerts on key inventory items. Helps to manage supply chain better
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

ST/OT Backorder Aging Alert

Business Requirement:

In multi-distribution manufacturing environment, transfer orders may always get the last priority over manufacturing plant in-house demands (or) the manufacturing plant servicing customer demands. Distribution planners tend to process ST/OT orders early to take care of manufacturing and transportation lead times. Supply Chain planners and managers need to review the backlog periodically to expedite the transfer process. This JDE inquiry helps to solve that issue

Technology used: One view Back ordered item not received inquiry

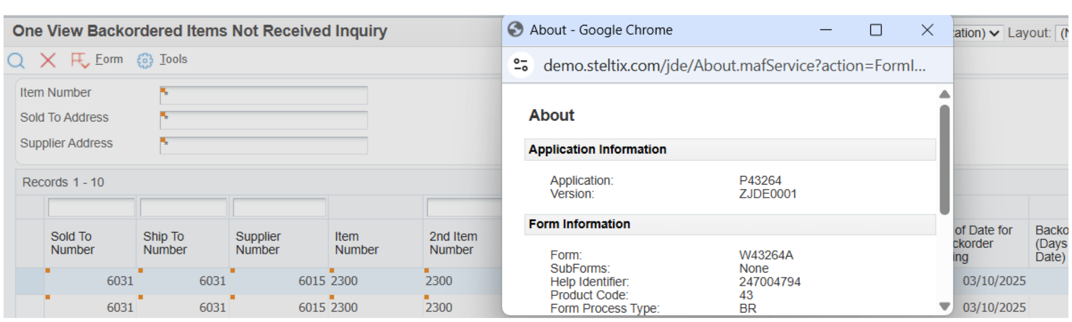
Limitations: None. Please check security granted to right roles, these are one view inquiry applications.

Limitations: None. Please check security granted to right roles

Table/Application Used: P43264

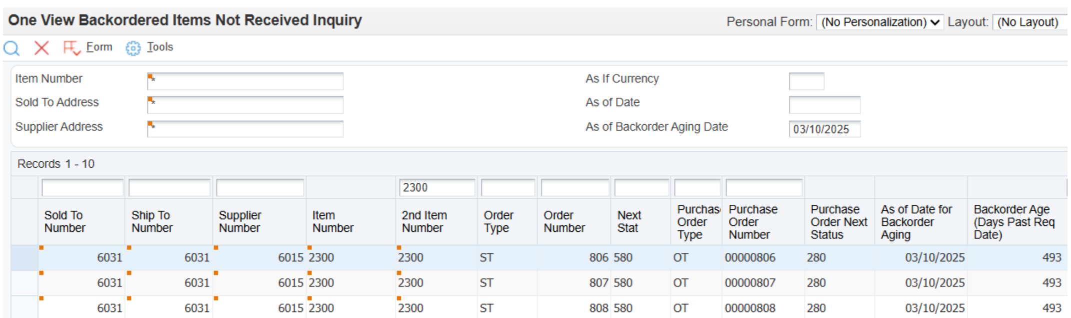
Step 1

Open this application from your menu. If it does not exists, ask IT to deploy to your security role. You will be testing this in non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2

Customize the grid (example below), place some QBE values to get valid data points. This demo system didn't had much data points. Always pull all common fields instead of basic grid to get to know the availability of necessary fields.



One View Backordered Items Not Received Inquiry

Personal Form: (No Personalization) Layout: (No Layout)

Form Tools

Item Number

Sold To Address

Supplier Address

As If Currency

As of Date

As of Backorder Aging Date 03/10/2025

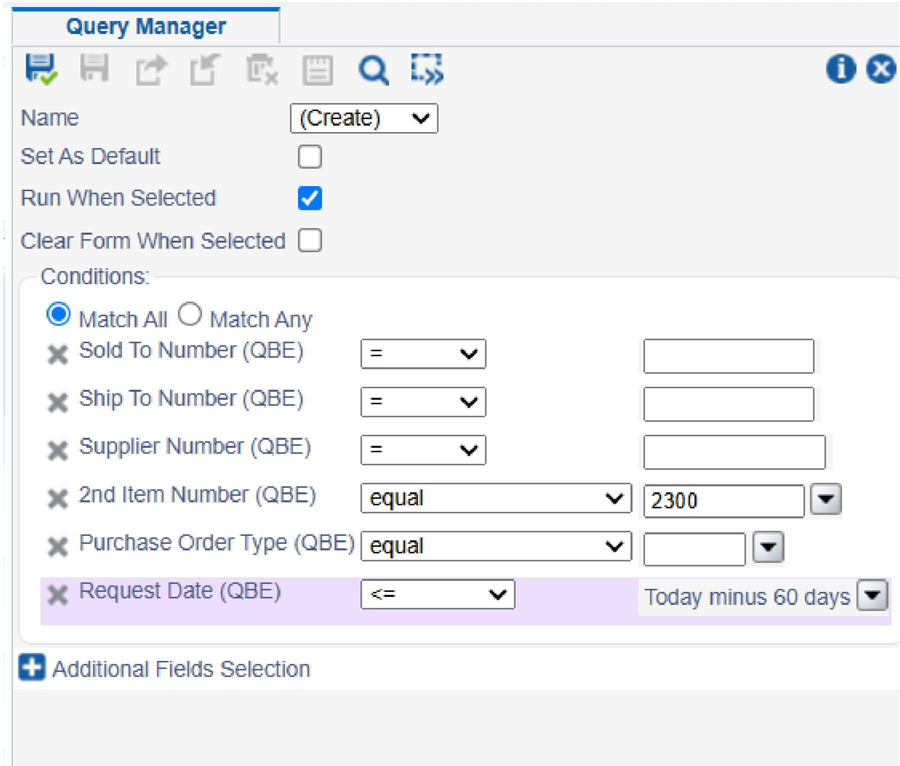
Records 1 - 10

Sold To Number	Ship To Number	Supplier Number	Item Number	2nd Item Number	Order Type	Order Number	Next Stat	Purchas Order Type	Purchase Order Number	Purchase Order Next Status	As of Date for Backorder Aging	Backorder Age (Days Past Req Date)
				2300								
6031	6031	6015	2300	2300	ST	806	580	OT	00000806	280	03/10/2025	493
6031	6031	6015	2300	2300	ST	807	580	OT	00000807	280	03/10/2025	493
6031	6031	6015	2300	2300	ST	808	580	OT	00000808	280	03/10/2025	493

Step 3

Create a new query. Use the right pane selections to start with. Branch plant, sold/ship to, second item#, PO type and request date range

Add more field as per your business needs.



Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage

Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the oneview sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to the all records option if you feel the watchlist extract is incorrect.

23. MRP PurOrd Messages B & O count Alert

Functional Area	Distribution
Number	23
Title	MRP PurOrd Messages B & O count Alert
Description	Avoid surprise questions raised at S&OP reviews on critical items deliveries
Purpose	Get alerts on key inventory items. Helps to manage supply chain better
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

MRP PurOrd Messages B & O count Alert

Business Requirement:

As functional supervisor or manager in purchasing or planning, you need to have an idea on the MRP message count. No one is expecting zero B or O type messages. Not even on the T past due type messages.

A casual watchlist on the message count will alert if any major changes to forecast or safety stock happened when you are busy with other activities. It will also act like a reminder to validate your lead times (to control B type messages), safety stock levels, etc.

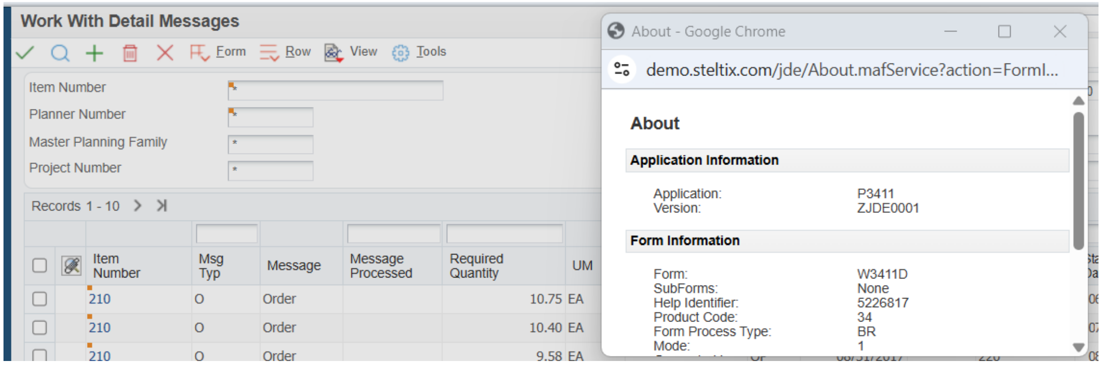
Technology used: MRP messages application

Limitations: None. Please check security granted to right roles. There is also oneview planning analysis application if your management does not want to expose the key p3411 to many other roles.

Table/Application Used: P3411

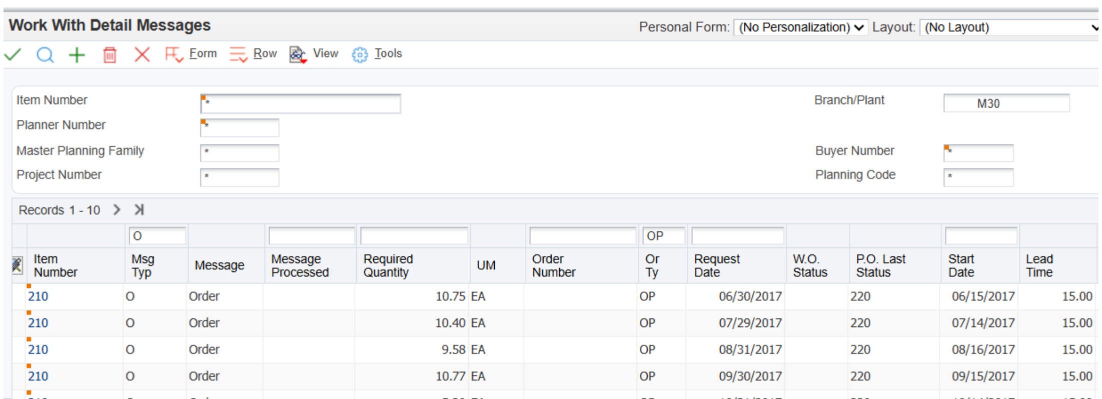
Step 1

Open this application from your menu. If it does not exists, ask IT to deploy to your security role. You will be testing this in non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



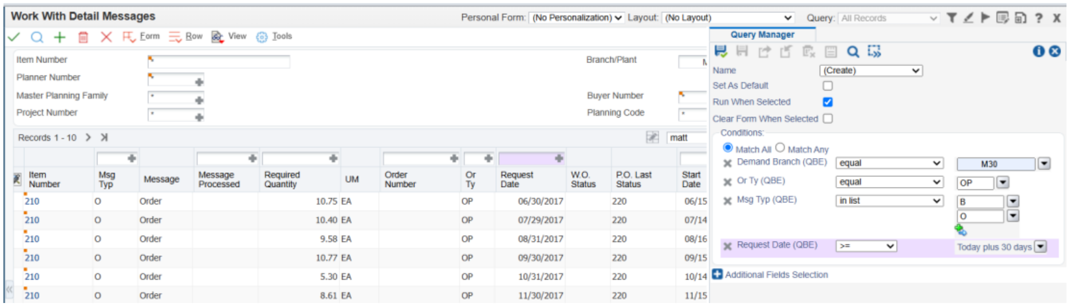
Step 2

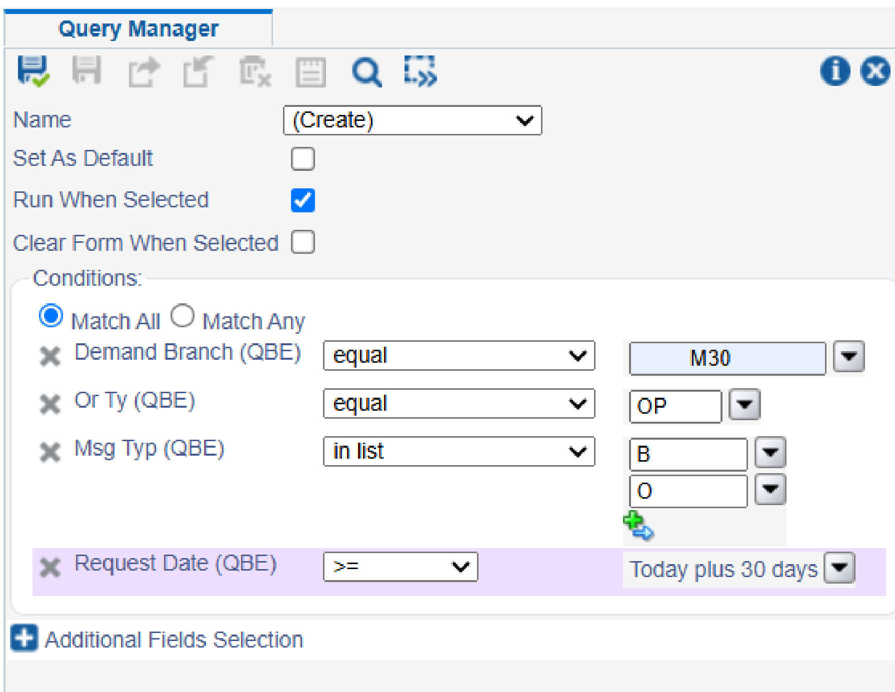
Customize the grid (example below), place some QBE values to get valid data points



Step 3

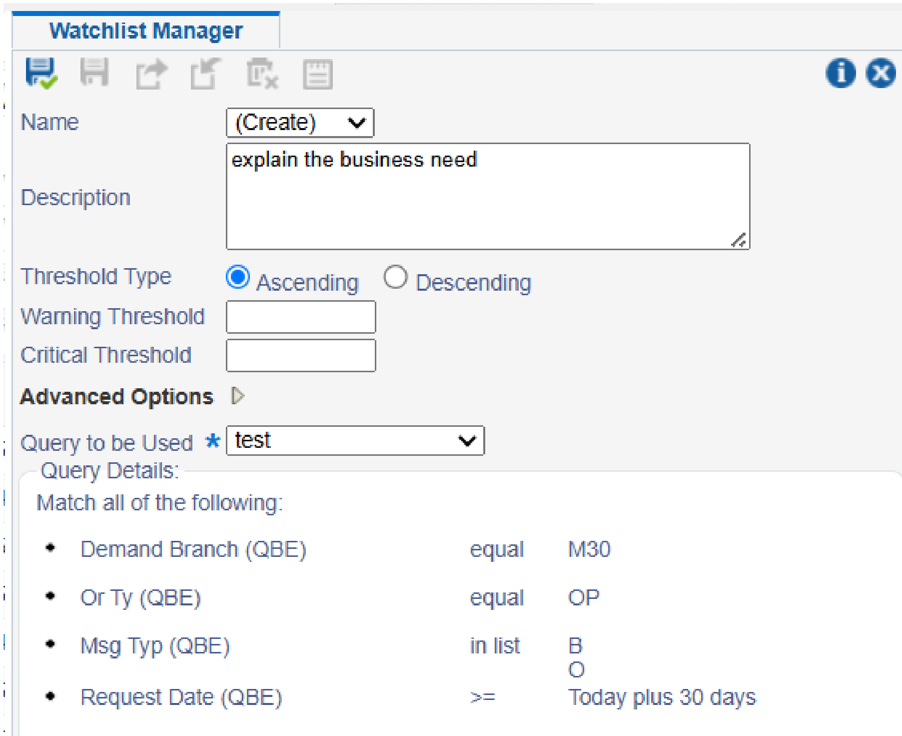
Create a new query. Use the right pane selections to start with. Branch plant, order type, message type, request date >today minus 30 days (as example). Save the query with a unique understandable name





Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to the all records option if you feel the watchlist extract is incorrect.

NOTE: This is a very powerful watchlist which could also be used for T, D,E type of messages. And the date range could vary based on your need. The idea is to get a total count picture on a daily basis. If the count is very well above or below your expected count, something else is happening in the system!. The watchlist also give the count total. If you see the static value for few days that means your nightly MRP batch is not running or failing for some date periods configurations.

24. MRP PurOrd Messages PAST DUE count Alert

Functional Area	Distribution
Number	24
Title	MRP PurOrd Messages PAST DUE count Alert
Description	Avoid surprise questions raised at S&OP reviews on critical items deliveries. If you can't buy it on time, then how can you deliver products on time?
Purpose	Get alerts on key inventory items. Helps to manage supply chain better
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

MRP PurOrd Messages PAST DUE count Alert

Business Requirement:

As functional supervisor or manager in purchasing or planning, you need to have an idea on the MRP message count. No one is expecting zero B or O type messages. Not even on the T past due type messages.

A casual watchlist on the message count will alert if any major changes to forecast or safety stock happened when you are busy with other activities. It will also act like a reminder to validate your lead times (to control B type messages), safety stock levels, etc. In this example, we are reviewing past due messages after certain number of days. No one is worried about one or two days delays, but sustained backlog is a problem with planning and vendor performances.

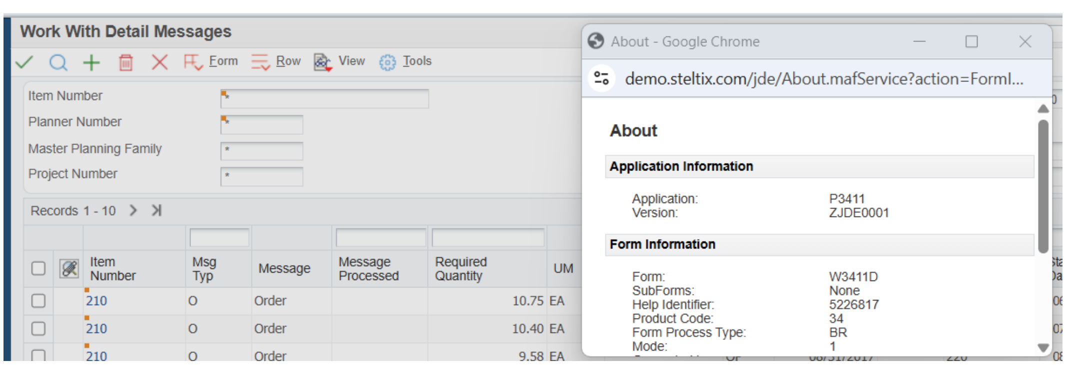
Technology used: MRP messages application

Limitations: None. Please check security granted to right roles

Table/Application Used: P3411

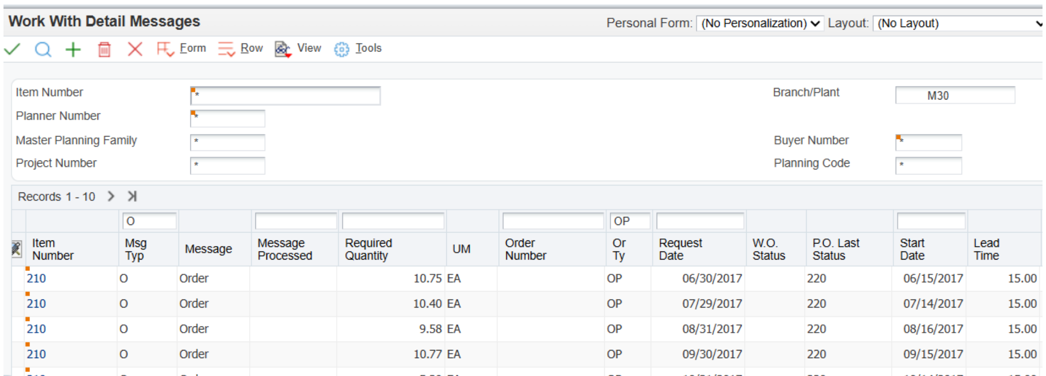
Step 1

Open this application from your menu. If it does not exists, ask IT to deploy to your security role. You will be testing this in non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



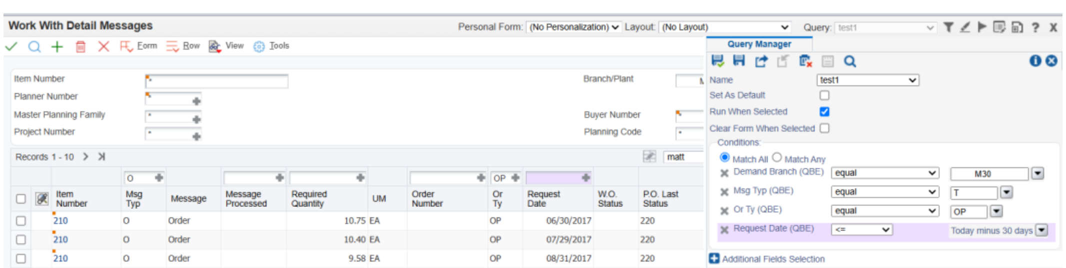
Step 2

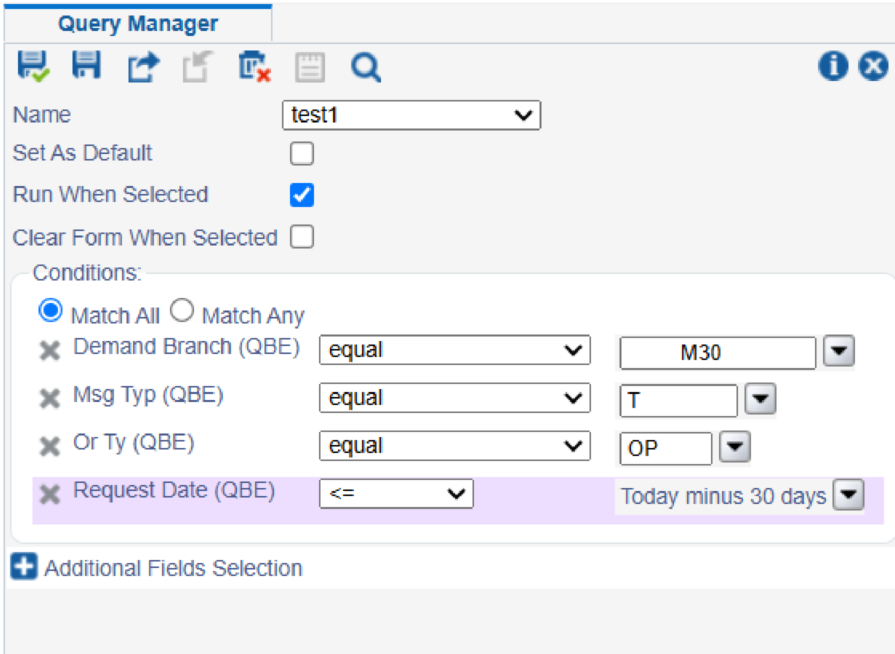
Customize the grid (example below), place some QBE values to get valid data points



Step 3

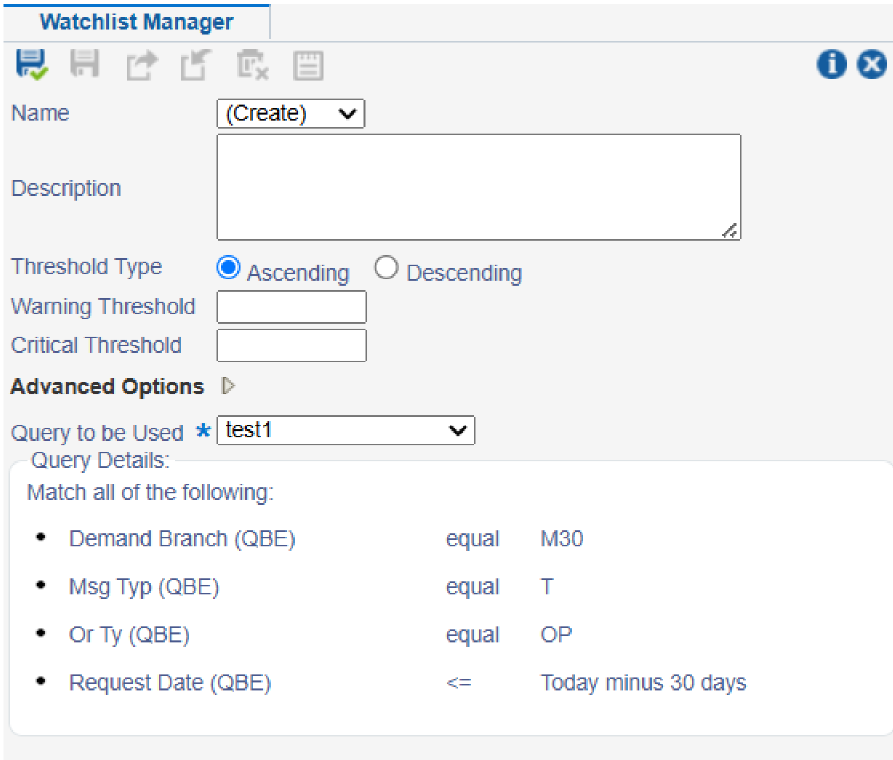
Create a new query. Use the right pane selections to start with. Branch plant, order type, message type, request date >today minus 30 days (as example). Save the query with a unique understandable name





Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the oneview sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to the all records option if you feel the watchlist extract is incorrect.

NOTE: This is a very powerful watchlist which will help the planners without asking for purchasing team on the delayed purchase orders. You can copy this watchlist to get another view of delays more than 30 days, which necessitates some serious discussions within the company. In that case, use oneview open purchase order inquiry which has remaining order quantity field values. If the purchase order was received like 99% and there is a residual value left, it is important that purchasing close those orders periodically. This particular aspect has financial implications especially if the vendor shipping partial quantities and didn't invoice for the entire partial quantities yet. And months go by if there are vendor reorganization and business issues.

25. MRP Workorder Messages B & O count Alert

Functional Area	Manufacturing
Number	25
Title	MRP Workorder Messages B & O count Alert
Description	Avoid surprise questions raised at S&OP reviews on critical items deliveries. If you can't make it on time, then how can you deliver products on time?
Purpose	Get alerts on key inventory items. Helps to manage supply chain better
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

MRP Workorder Messages B & O count Alert

Business Requirement:

As functional supervisor or manager in purchasing or planning, you need to have an idea on the MRP message count. No one is expecting zero B or O type messages. Not even on the T past due type messages.

A casual watchlist on the message count will alert if any major changes to forecast or safety stock happened when you are busy with other activities. It will also act like a reminder to validate your lead times (to control B type messages), safety stock levels, etc.

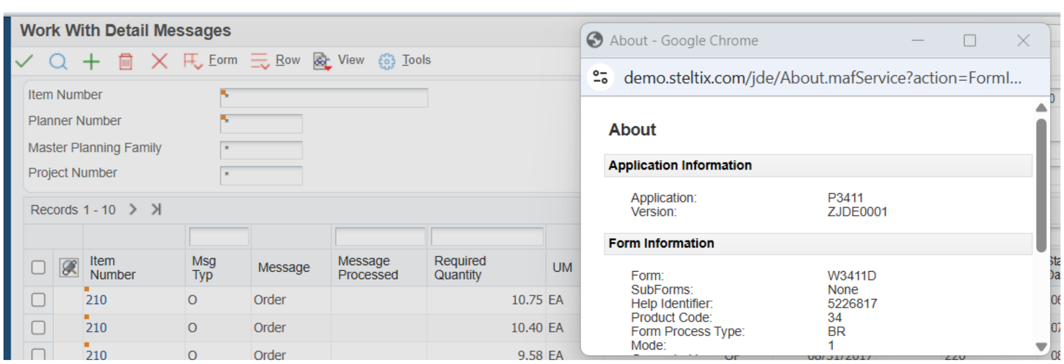
Technology used: MRP messages application

Limitations: None. Please check security granted to right roles. There is also oneview planning analysis application if your management does not want to expose the key p3411 to many other roles.

Table/Application Used: P3411

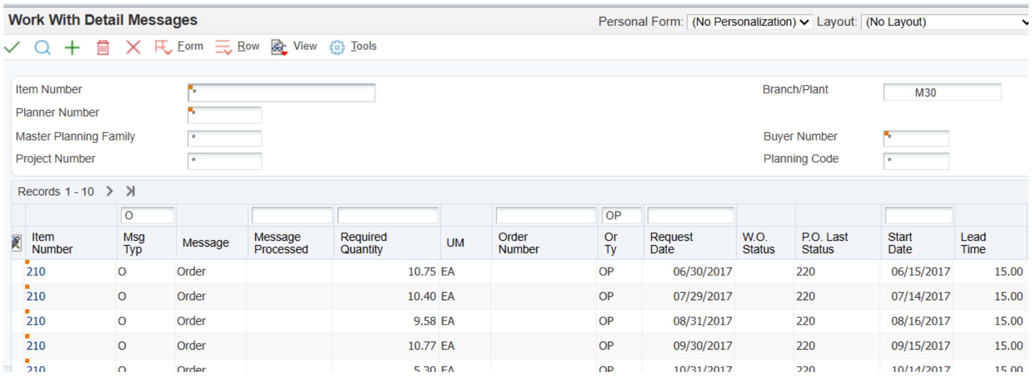
Step 1

Open this application from your menu. If it does not exists, ask IT to deploy to your security role. You will be testing this in non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



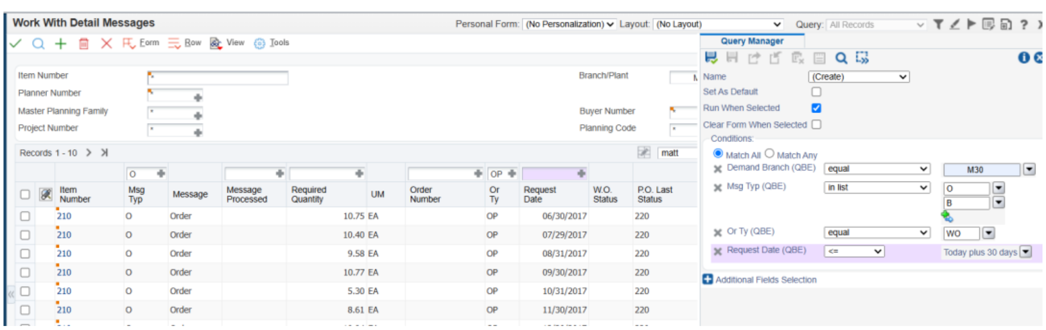
Step 2

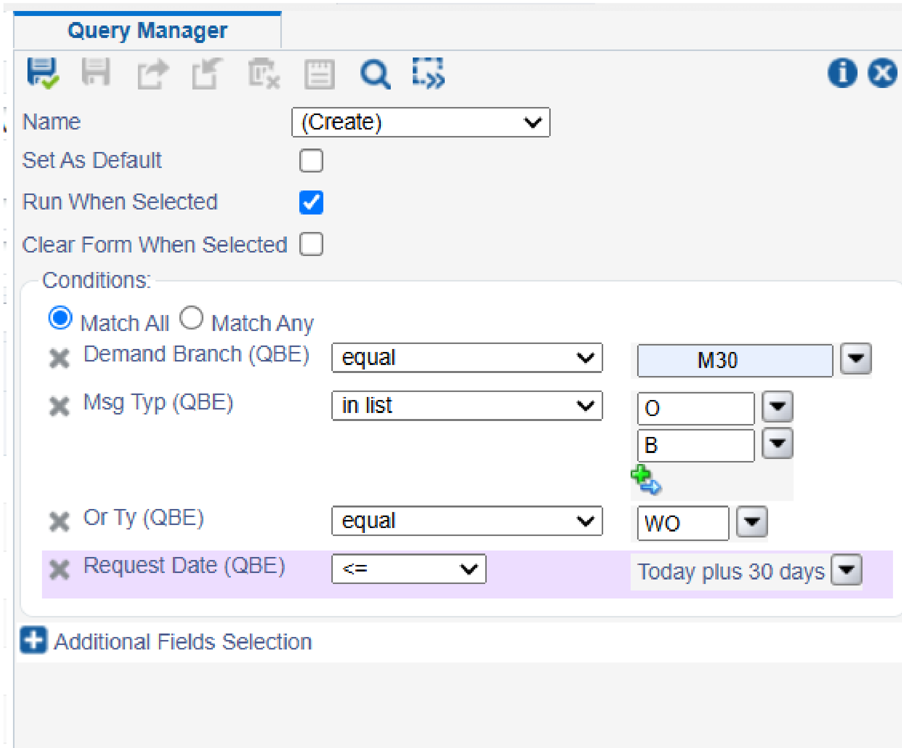
Customize the grid (example below), place some QBE values to get valid data points



Step 3

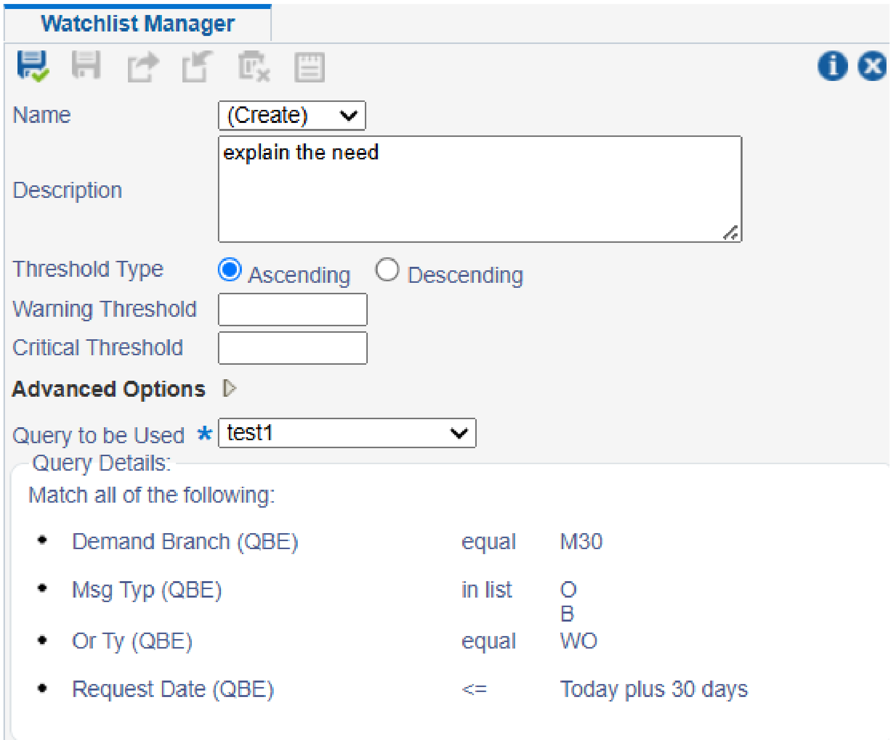
Create a new query. Use the right pane selections to start with. Branch plant, order type, message type, request date >today minus 30 days (as example). Save the query with a unique understandable name





Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the oneview sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to the all records option if you feel the watchlist extract is incorrect.

NOTE: This is a very powerful watchlist which could also be used for T, D,E type of messages. And the date range could vary based on your need. The idea is to get a total count picture on a daily basis. If the count is very well above or below your expected count, something else is happening in the system!. The watchlist also give the count total. If you see the static value for few days that means your nightly MRP batch is not running or failing for some date periods configurations.

26. MRP WorkOrd Messages PAST DUE count

Functional Area	Manufacturing
Number	26
Title	MRP WorkOrd Messages PAST DUE count
Description	Avoid surprise questions raised at S&OP reviews on critical items deliveries. If you can’t make it on time, then how can you deliver products on time?
Purpose	Get alerts on key inventory items. Helps to manage supply chain better
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

MRP WorkOrd Messages PAST DUE count

Business Requirement:

As functional supervisor or manager in purchasing or planning, you need to have an idea on the MRP message count. No one is expecting zero B or O type messages. Not even on the T past due type messages.

A casual watchlist on the message count will alert if any major changes to forecast or safety stock happened when you are busy with other activities. It will also act like a reminder to validate your lead times (to control B type messages), safety stock levels, etc.

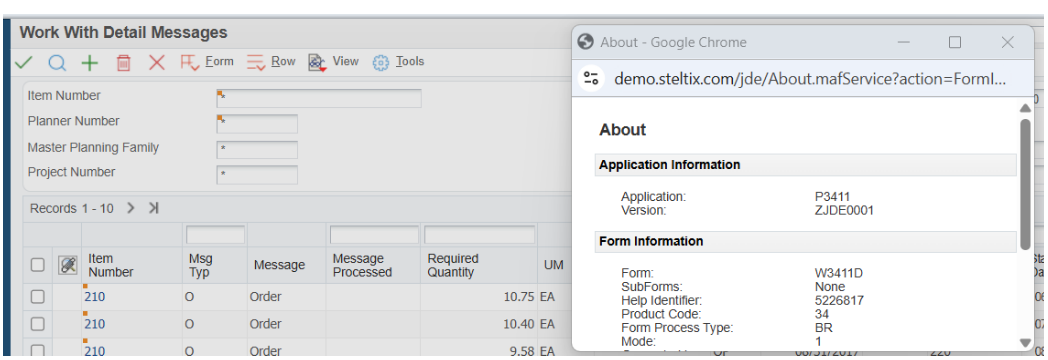
Technology used: MRP messages application

Limitations: None. Please check security granted to right roles

Table/Application Used: P3411

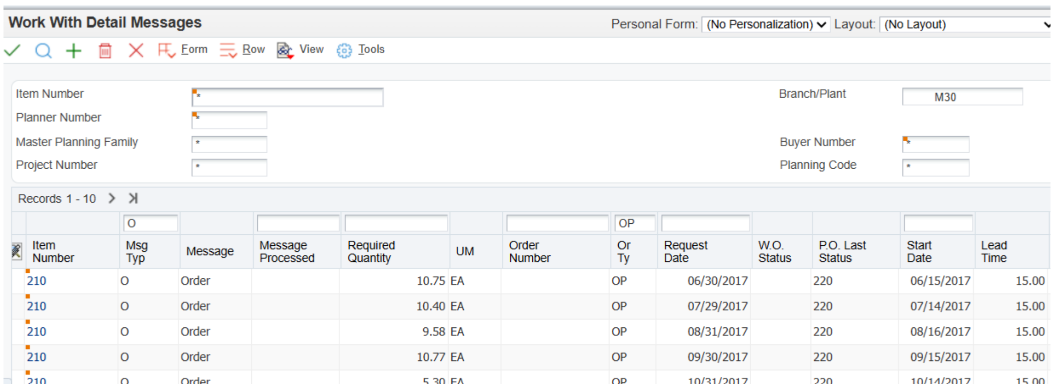
Step 1

Open this application from your menu. If it does not exists, ask IT to deploy to your security role. You will be testing this in non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



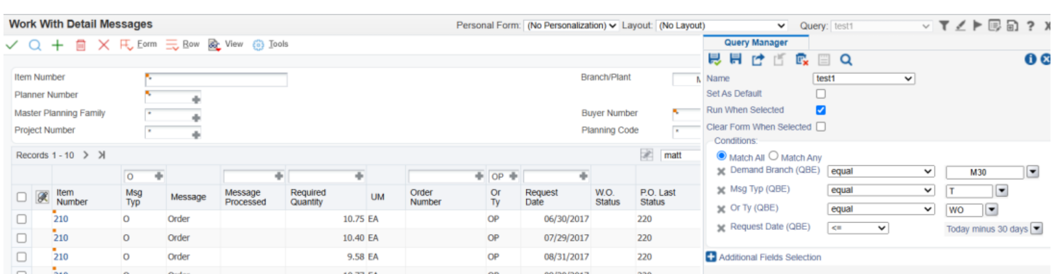
Step 2

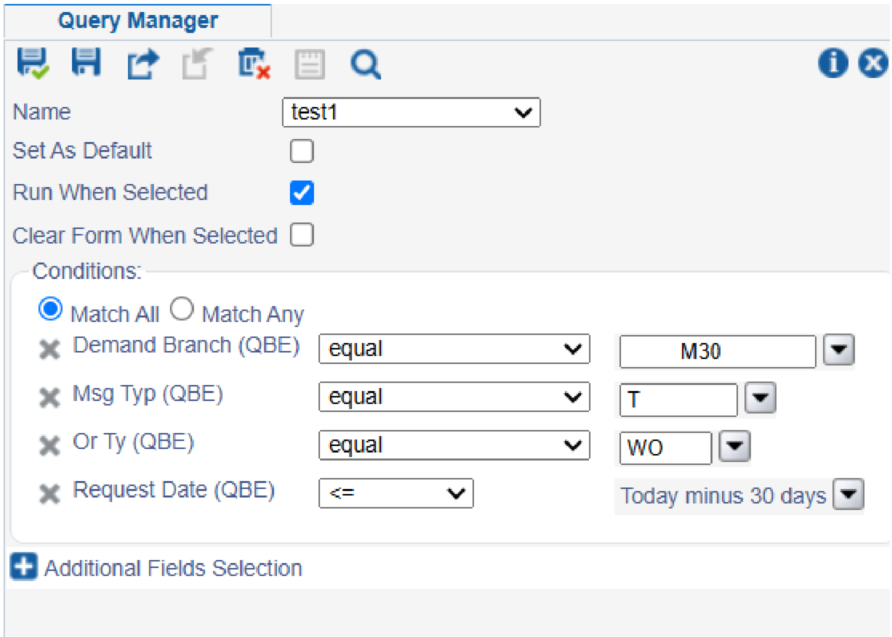
Customize the grid (example below), place some QBE values to get valid data points



Step 3

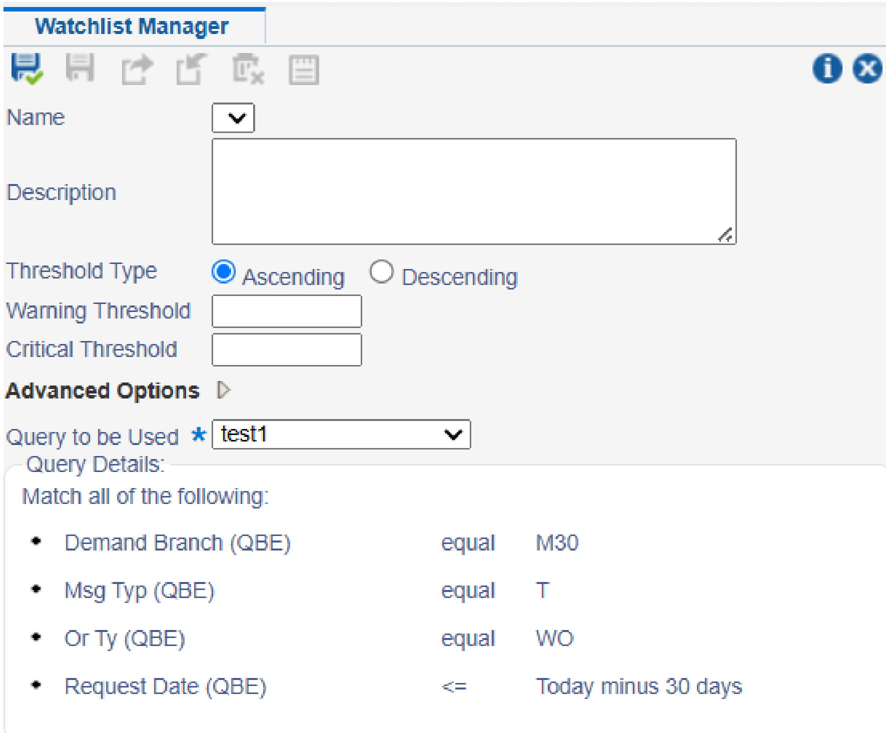
Create a new query. Use the right pane selections to start with. Branch plant, order type, message type, request date >today minus 30 days (as example). Save the query with a unique understandable name





Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the oneview sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to the all records option if you feel the watchlist extract is incorrect.

NOTE: This is a very powerful watchlist which could also be used for T, D,E type of messages. And the date range could vary based on your need. The idea is to get a total count picture on a daily basis. If the count is very well above or below your expected count, something else is happening in the system

You can re-build this query with WO status <=95 to know whether responsibility exists. Supply & Demand inclusion rules should not take work orders above 95 status anyway. Also better to review workorders are some placeholder status(s) like 05 or 80, where accounting or shop floor supervisor place them in parking lot reviews. These should be typically be cleared by month end to get clearer variance and WIP accounting transactions.

27. MRP items MDF less than LT Alert

Functional Area	Manufacturing
Number	27
Title	MRP items MDF less than LT Alert
Description	Fix planning data discrepancies
Purpose	Get alerts on key inventory items. Helps to manage supply chain better
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

MRP items MDF less than LT Alert

Business Requirement:

One of the MRP performance indicator is to have message display fence greater than lead time in the item branch planning values. Message display fence less than lead time will result in less MRP Messages and then sudden surge once the lead time days window is open. It will give misleading MRP message count. If the users complain on having large count of messages, one can filter out request date (< date) and also use different message type values (B, O, T, etc.) in the message review application P3411

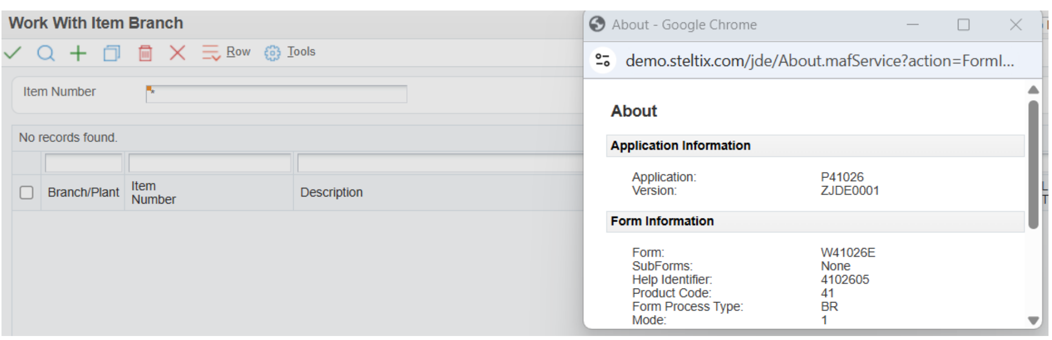
Technology used: Item Branch application

Limitations: None. Please check security granted to right roles

Table/Application Used: P3411

Step 1

Open this application from your menu. If it does not exists, ask IT to deploy to your security role. You will be testing this in non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2

Customize the grid (example below), place some QBE values to get valid data points

Work With Item Branch

Personal Form: (No Personalization) Layout: (No Layout)

Row Tools

Item Number *

Records 1 - 5

	Branch/Plant	Item Number	Description	Stocking Type	Buyer Number	Planner Number	Supplier Number	Plan Fmly	Line Type
	M30		P*	S					
☐	M30	TW60EX	Pallet Type #3	S					S
☐	M30	AP020	Parent (Commitments)	S					S
☐	M30	AP002	Parent Item	S					S
☐	M30	AP001	Parent Item 2nd	S					S
☐	M30	740931	Protective Eyewear	S					S

Short Item No	Freeze Time Fence Days	Issue Type Code	Order Policy Code	Order Policy Code	Planning Time Fence Days	Planning Time Fence Rule	Planning Code	Message Time Fence Days	Leadtime Level
60193		I	1	1			2		5
60003		I	1	1			2		5
60011		I	1	1			2		15
60020		I	1	1			2		10
60169		I	1	1			2		5
60177	10	U	1	1	15	C	3	60	5
60185		I	1	1			2		5
60071		I	1	1			2		15
60134		I	1	1			2		5
60142	10	U	1	1	15	C	3	60	5

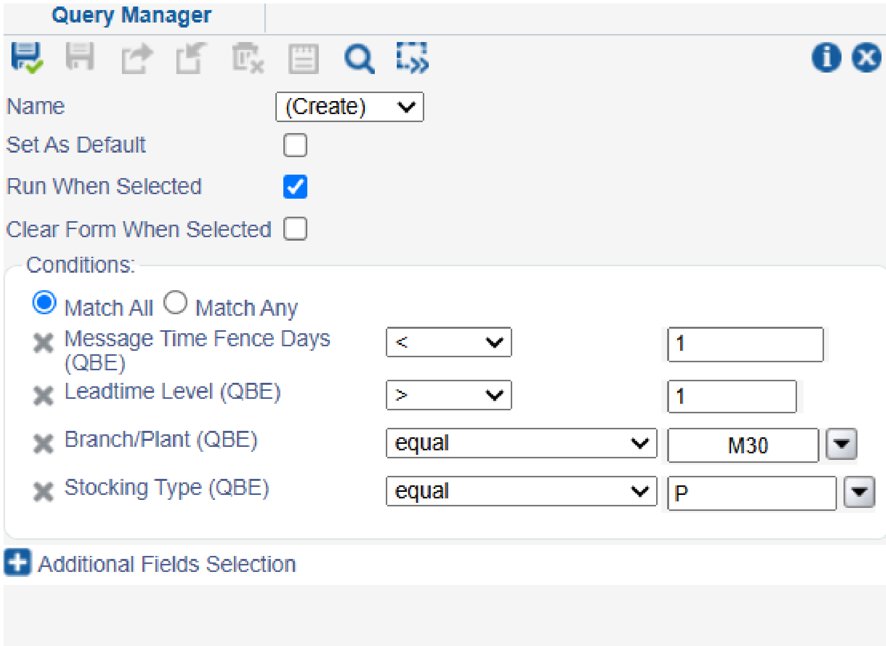
test

Short Item No	Freeze Time Fence Days	Issue Type Code	Order Policy Code	Order Policy Code	Planning Time Fence Days	Planning Time Fence Rule	Planning Code	Message Time Fence Days	Leadtime Level
								<1	>1
60775		I	1	1			2		20
60716		I	1	1			2		5
723962		I	1	1			2		2
60863		I	1	1			2		25
60871		I	1	1			2		25
60880		I	1	1			2		4
60898		I	1	1			2		4
723971		I	1	1			2		2
723989		I	1	1			2		2
723997		I	1	1			2		2

The above view is an example of grid extension on item branch application. Creating grid extension is separately explained in later part of the book

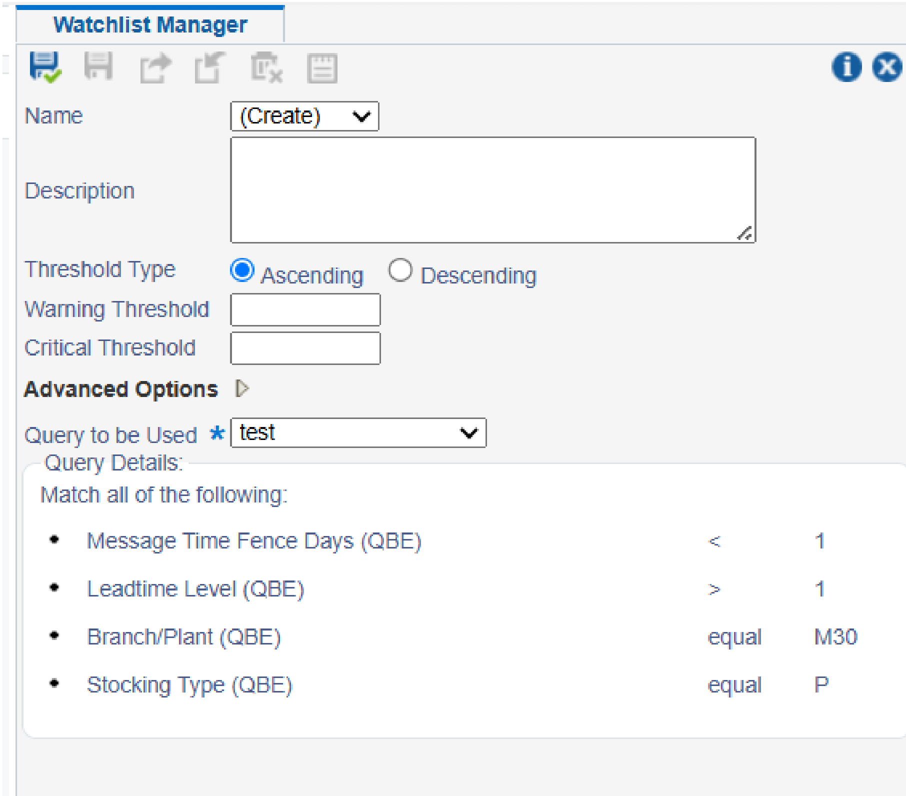
Step 3

Create a new query. Use the right pane selections to start with. Branch plant, stocking type, lead time > 1 (this example), etc. Save the query with a unique understandable name



Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the oneview sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to the all records option if you feel the watchlist extract is incorrect.

NOTE: Ideally we want the data where message time fence days is less than lead time level days, which is possible in SQL queries. But for watchlists, you can export data periodically and do excel VLOOKUP to get the subset of exceptions. Hope future releases provide field level comparison features under watchlists.

28. MRP items where Item Primary Supplier is blank Alert

Functional Area	Manufacturing
Number	28
Title	MRP items where Item Primary Supplier is blank Alert
Description	Fix planning data discrepancies
Purpose	Get alerts on key inventory items. Helps to manage supply chain better
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

MRP items where Item Primary Supplier is blank Alert

Business Requirement:

Releasing purchase orders from Message Review MRP application requires a primary supplier value. MRP release will fail for blank supplier value. PDM or Purchasing personnel who are responsible for setting up this value could have this watchlist. An example below is shown for some critical fields. You can expand it using MRP planning parameters (that require grid extension) so that the watchlist is useful and productive. You do not care about blank values in non-MRP item branch SKUs.

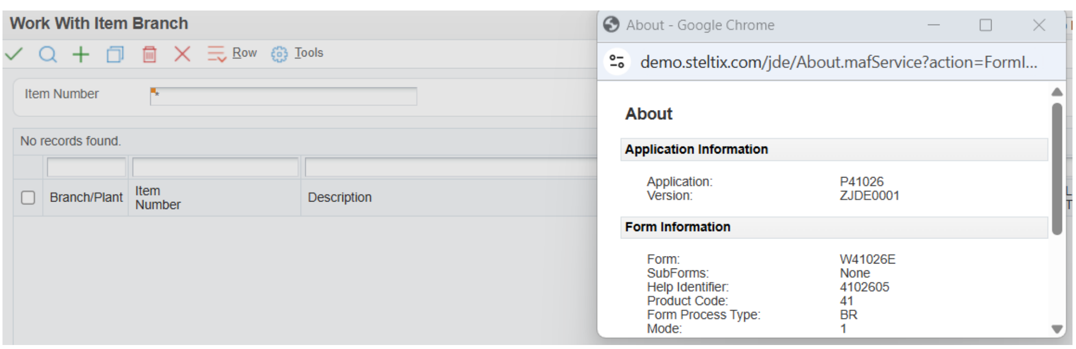
Technology used: Item Branch application

Limitations: None. Please check security granted to right roles

Table/Application Used: P41026

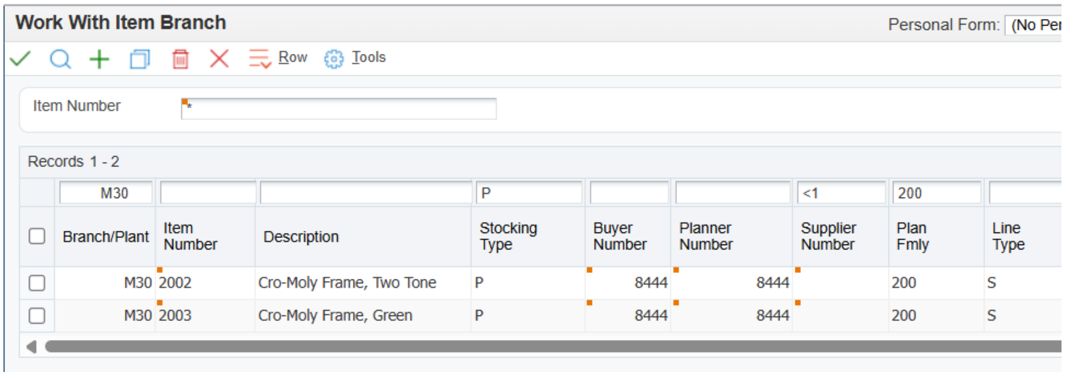
Step 1

Open this application from your menu. If it does not exists, ask IT to deploy to your security role. You will be testing this in non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2

Customize the grid (example below), place some QBE values to get valid data points


Work With Item Branch

Personal Form: (No Per

Row Tools

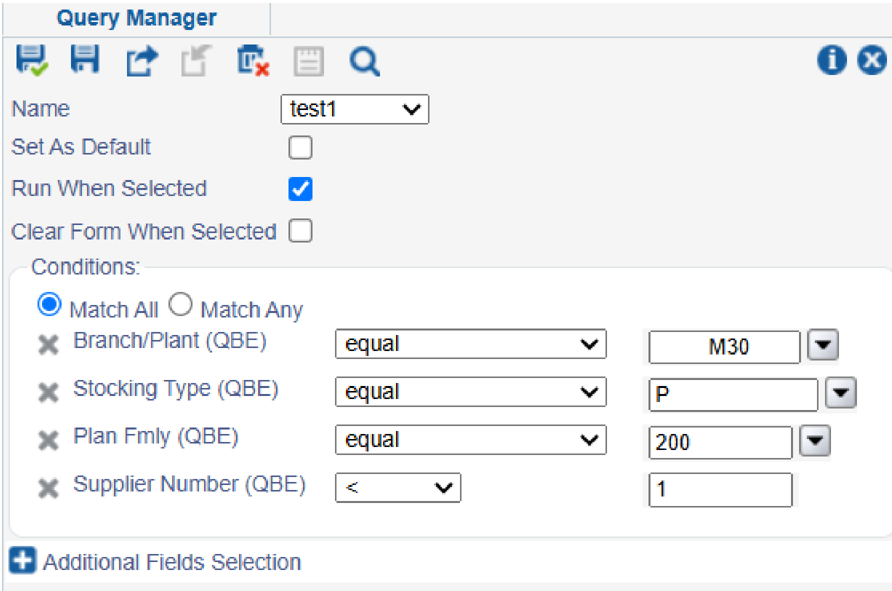
Item Number *

Records 1 - 2

	Branch/Plant	Item Number	Description	Stocking Type	Buyer Number	Planner Number	Supplier Number	Plan Fmly	Line Type
	M30			P			<1	200	
	M30	2002	Cro-Moly Frame, Two Tone	P	8444	8444		200	S
	M30	2003	Cro-Moly Frame, Green	P	8444	8444		200	S

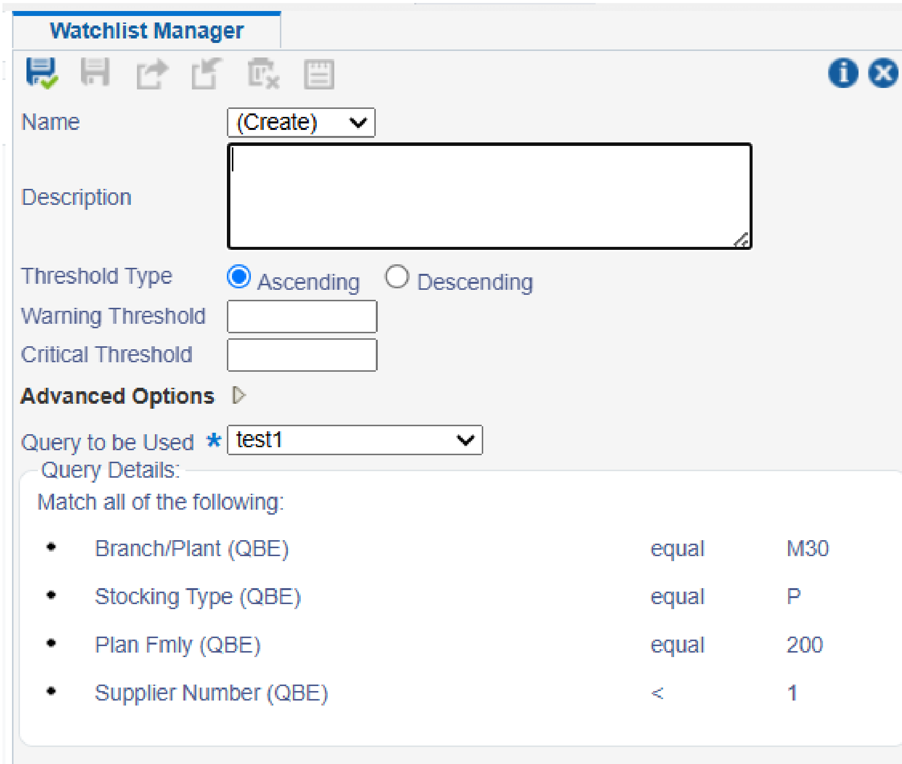
Step 3

Create a new query. Use the right pane selections to start with. Branch plant, stocking type, planning family (200 in this example), supplier number <1 (as example). Save the query with a unique understandable name



Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the oneview sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to the all records option if you feel the watchlist extract is incorrect.

NOTE: This above example uses planning family (PRP$) and stocking type=P values. You can add more conditions like planning code=1 and other category codes to get the fine-tuned list. Also note that stocking type=P in multi-branch ST/OT environment means something, where blank supplier code is a valid reason. You may have to exclude those distribution branches and focus on manufacturing plants where purchase orders (not transfer orders) are placed

29. WO component issues qty surprises Alert

Functional Area	Manufacturing
Number	29
Title	WO component issues qty surprises Alert
Description	Don’t wait till end of the month on the surprises
Purpose	Get alerts on key inventory items. Helps to manage supply chain better
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

WO component issues qty surprises Alert

Business Requirement:

In a fast moving manufacturing environment, the work order cycle is short and yet prone to errors. Users may double book the issues (if scanner didn’t work first time) and also issue components against the wrong work orders. Typically companies enable additional material issues, which can be possibly stopped with the change in processing option.

Workorders getting completed and goes to 95 (typically). Manufacturing accounting run at periodic intervals. Scheduled jobs push the status to 96 or 97 based on the configurations/usage. Accountants look at the variance. For any problems, they may push back to 92 or any other accounting use only status.

However, these orders on hold status need to be reviewed at every month end for better book keeping purposes. You don't want to book the variance the next months or many months after regular transactions have happened.

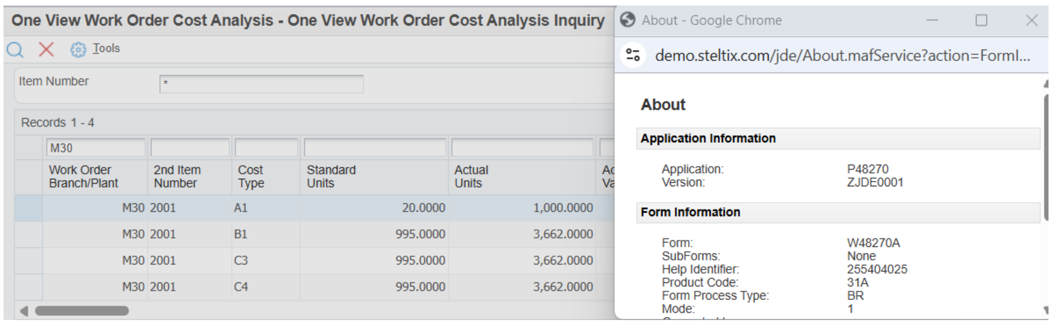
Technology used: UDO watchlist.

Limitations: Ensure you have security access to run this application

Table/Application Used: P48270

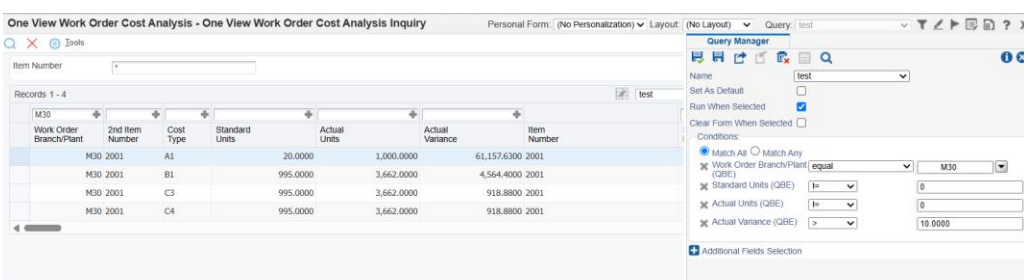
Step 1

Open One View WO cost analysis inquiry application

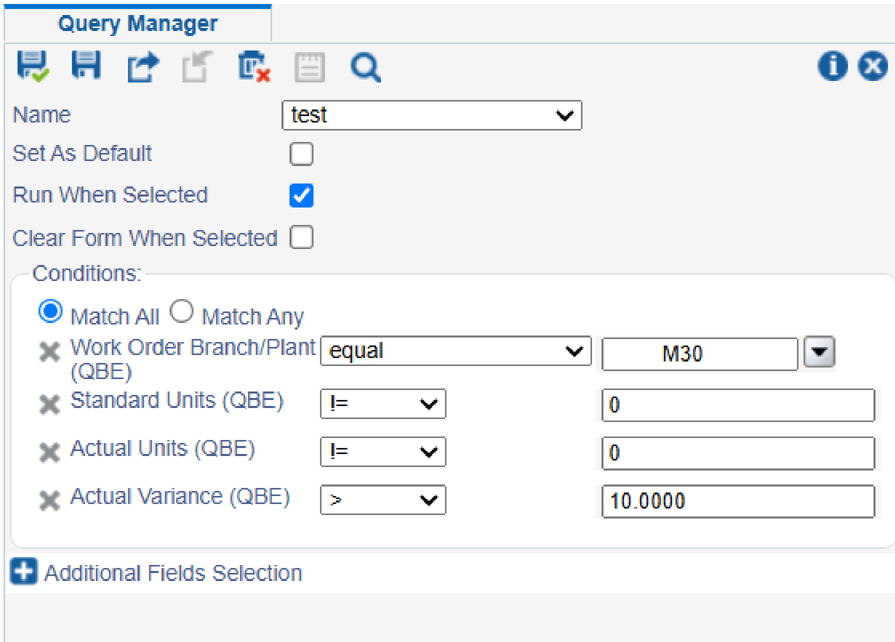


Step 2

Populate some QBE values and create a new query

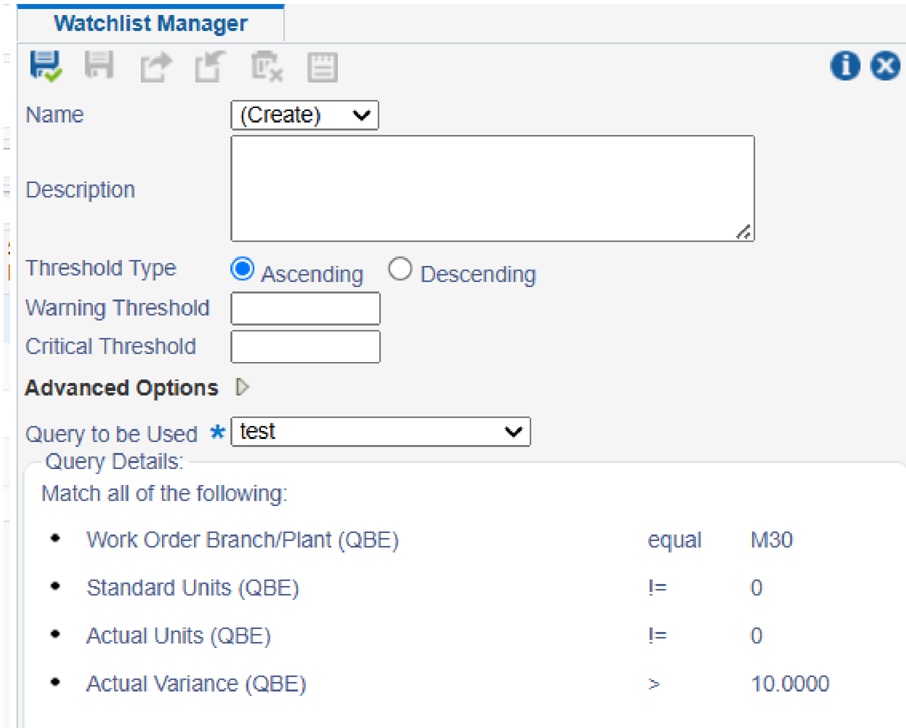


Bigger view of the query manager



Step 3

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



NOTE: This is a very powerful watchlist which can be used in many different combinations.

Standard units, actual units, actual variance at different threshold levels

Standard units, planning units, planned variance at different levels

Similar concept for $ values

It is important manufacturing accounting job run at regular scheduler intervals and not dependent on a user to run it.

30. Work order Engg threshold $ Alert

Functional Area	Manufacturing
Number	30
Title	Work order Engg threshold $ Alert
Description	Don’t wait till end of the month on the surprises
Purpose	Get alerts on key inventory items. Helps to manage manufacturing accounting better
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

Work order Engg threshold $ Alert

Business Requirement:

In a fast moving manufacturing environment, the work order cycle is short and yet prone to errors. Users may double book the issues (if scanner didn’t work first time) and also issue components against the wrong work orders. Typically companies enable additional material issues, which can be possibly stopped with the change in processing option.

Workorders getting completed and goes to 95 (typically). Manufacturing accounting run at periodic intervals. Scheduled jobs push the status to 96 or 97 based on the configurations/usage. Accountants look at the variance. For any problems, they may push back to 92 or any other accounting use only status.

However, these orders on hold status need to be reviewed at every month end for better book keeping purposes. You don't want to book the variance the next months or many months after regular transactions have happened.

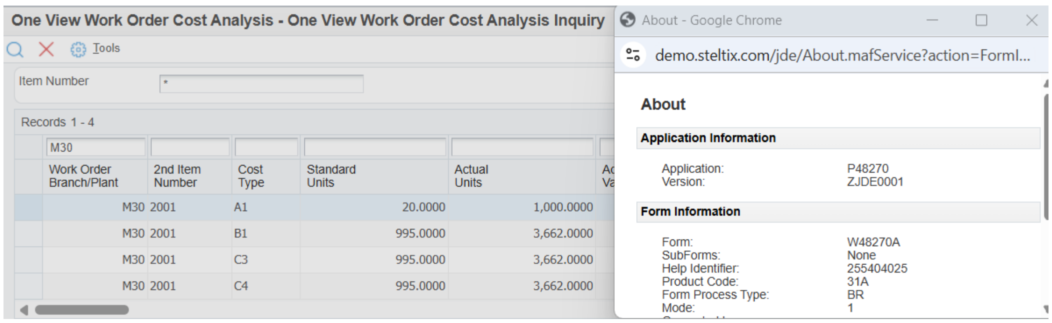
Technology used: UDO watchlist.

Limitations: Ensure you have security access to run this application

Table/Application Used: P48270

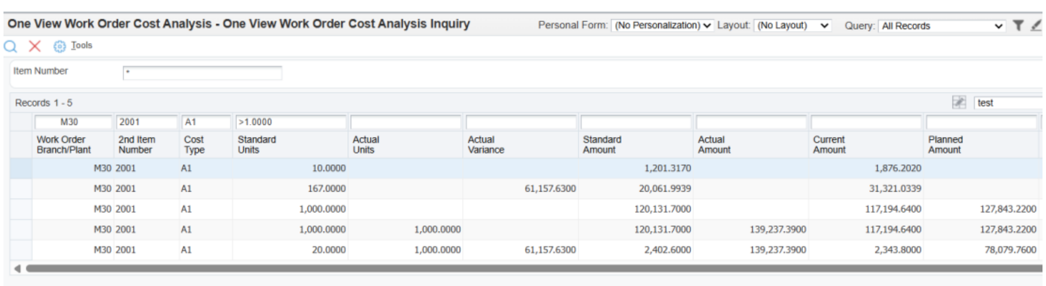
Step 1

Open One View WO cost analysis inquiry application

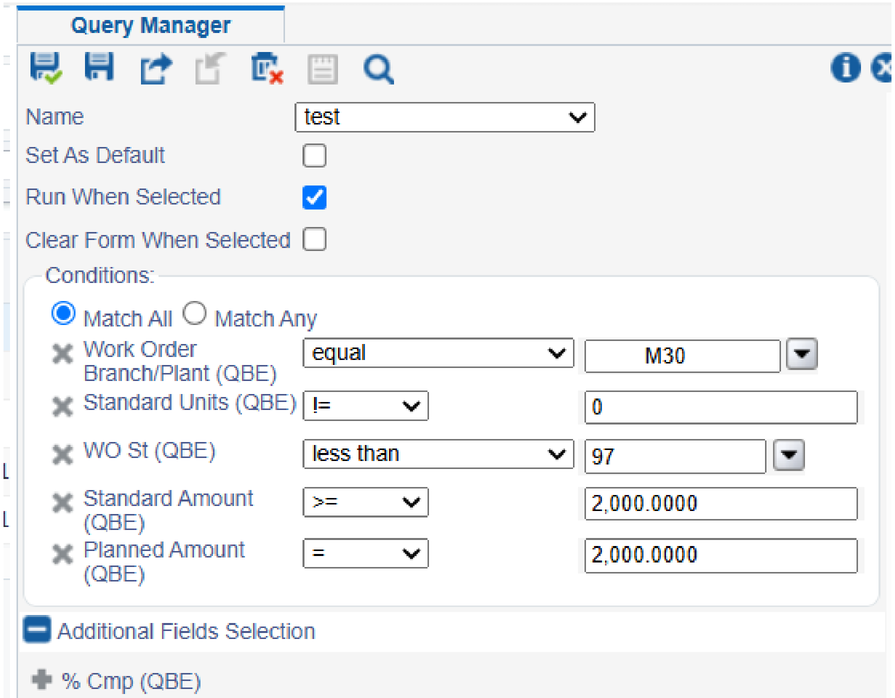


Step 2

Populate some QBE values and create a new query



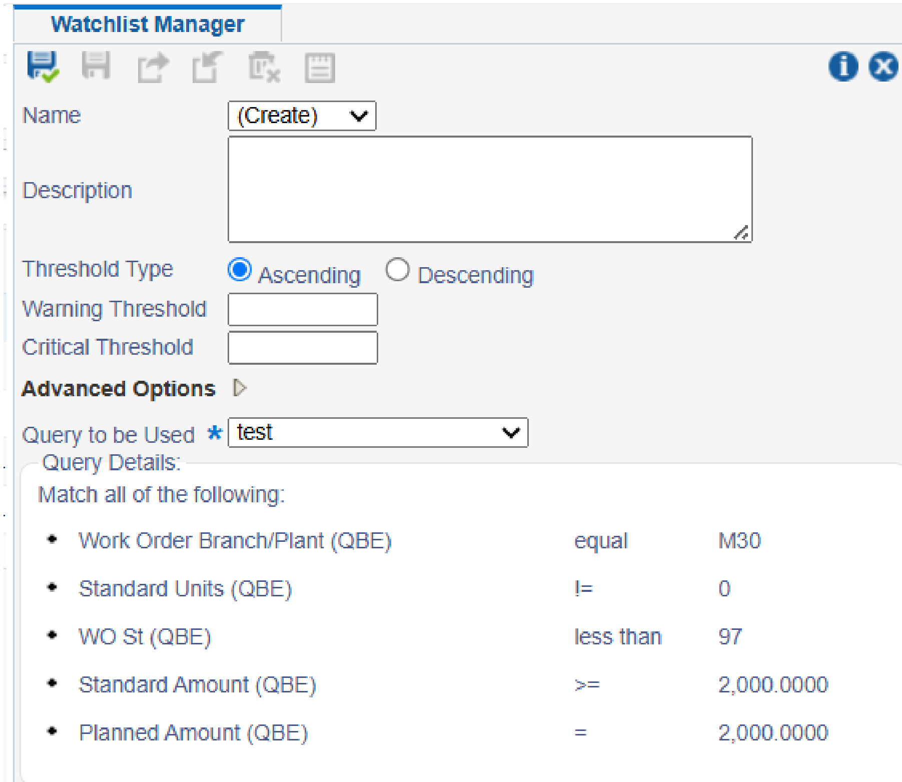
Bigger view of the query manager



Include cost type=A1 to the above

Step 3

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



NOTE: This is a very powerful watchlist which can be used in many different combinations.

Standard units, actual units, actual variance at different threshold levels

Standard units, planning units, planned variance at different levels

Similar concept for $ values

It is important manufacturing accounting job run at regular scheduler intervals and not dependent on a user to run it.

31. Work order Planned threshold $ Alert

Functional Area	Manufacturing
Number	31
Title	Work order Planned threshold $ Alert
Description	Don't wait till end of the month on the surprises
Purpose	Get alerts on key inventory items. Helps to manage manufacturing accounting better
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

Work order Planned threshold $ Alert

Business Requirement:

In a fast moving manufacturing environment, the work order cycle is short and yet prone to errors. Users may double book the issues (if scanner didn't work first time) and also issue components against the wrong work orders. Typically companies enable additional material issues, which can be possibly stopped with the change in processing option.

Workorders getting completed and goes to 95 (typically). Manufacturing accounting run at periodic intervals. Scheduled jobs push the status to 96 or 97 based on the configurations/usage. Accountants look at the variance. For any problems, they may push back to 92 or any other accounting use only status.

However, these orders on hold status need to be reviewed at every month end for better book keeping purposes. You don’t want to book the variance the next months or many months after regular transactions have happened.

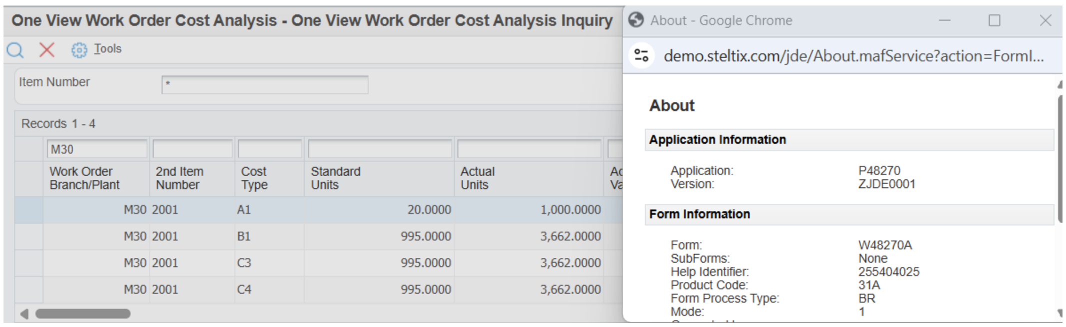
Technology used: UDO watchlist.

Limitations: Ensure you have security access to run this application

Table/Application Used: P48270

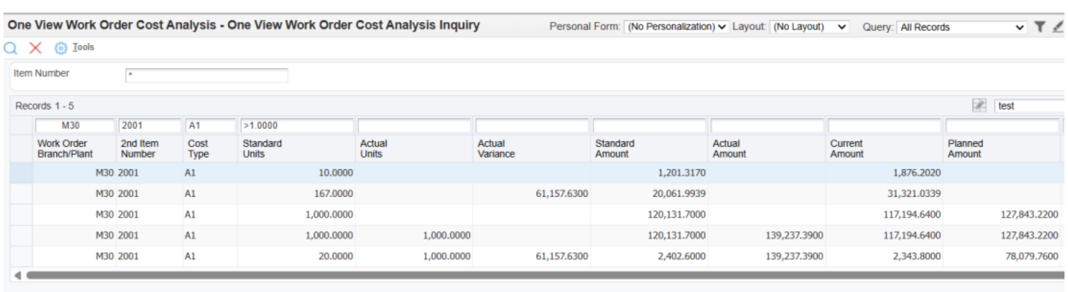
Step 1

Open One View WO cost analysis inquiry application

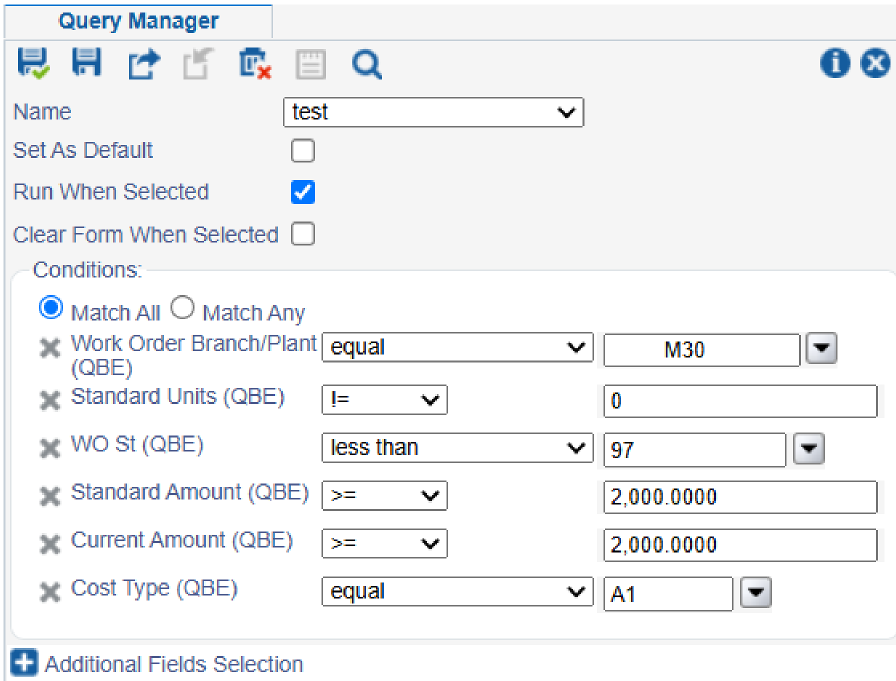


Step 2

Populate some QBE values and create a new query

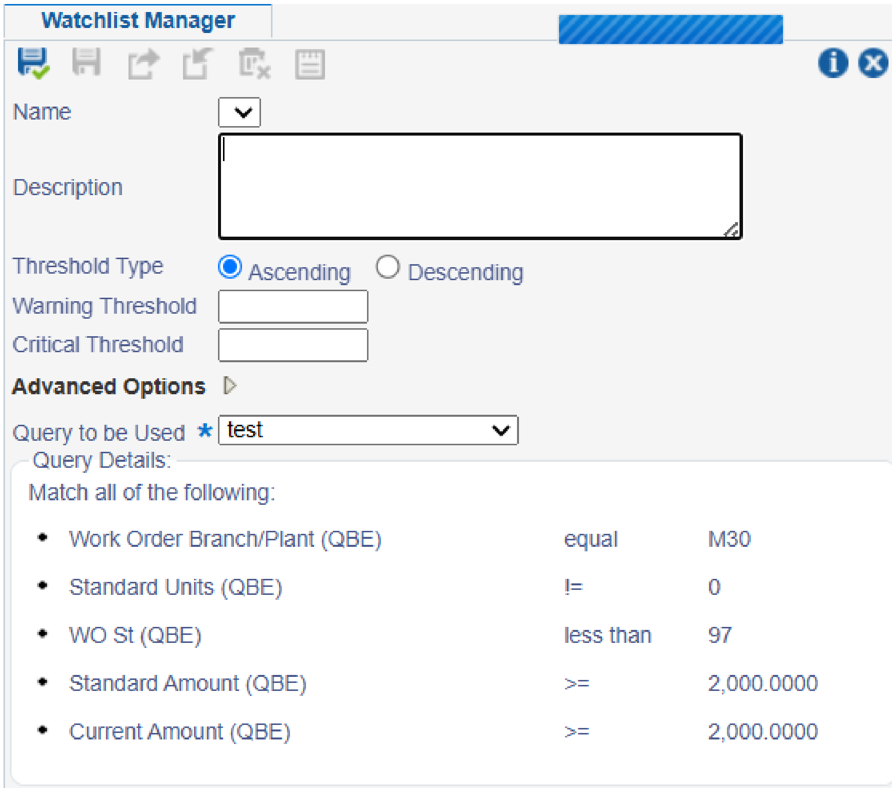


Bigger view of the query manager



Step 3

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



NOTE: This is a very powerful watchlist which can be used in many different combinations.

Standard units, actual units, actual variance at different threshold levels

Standard units, planning units, planned variance at different levels

Similar concept for $ values

It is important manufacturing accounting job run at regular scheduler intervals and not dependent on a user to run it.

32. Work Order Operations Delayed Alert

Functional Area	Manufacturing
Number	32
Title	Work Order Operations Delayed Alert
Description	Don't wait till end of the month on the surprises. Does your work orders get struck at operations due to delays and/or outside processing steps?
Purpose	Get alerts on key inventory items. Helps to manage workorder execution better
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

Work Order Operations Delayed Alert

Business Requirement:

On long lead time manufacturing environment, work orders get delayed at one or more workcenters. Schedulers keep chasing the work order progress but the planners or manufacturing supervisors need an alert that can tell the delays in a snapshot. That will help in rescheduling work orders and/or additional over time for those work centers.

This acts like an exception dispatch list which needs management attention.

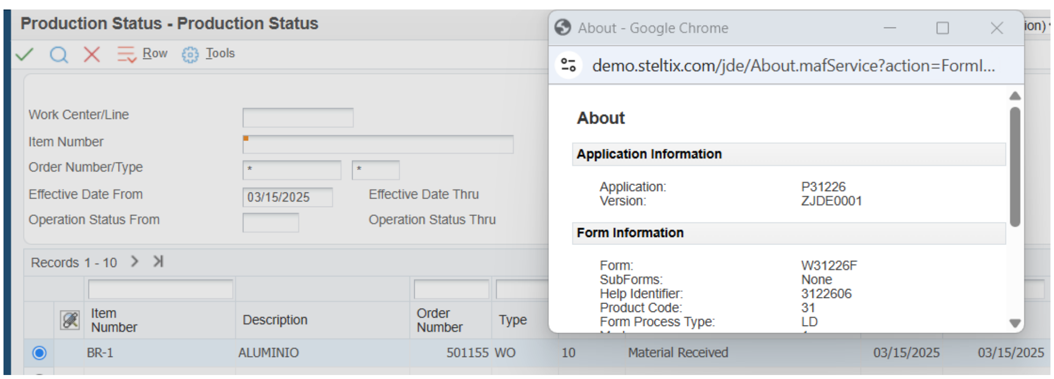
Technology used: Watch list

Limitations: None. Please check security granted to right roles

Table/Application Used: P31226

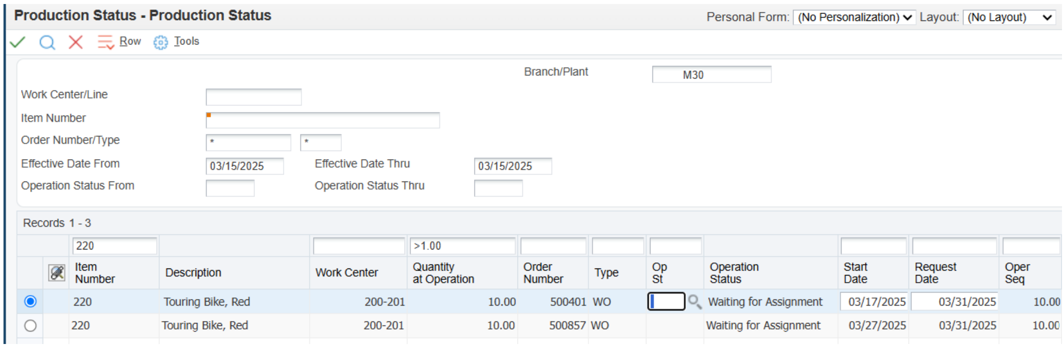
Step 1

Open this application from your menu. If it does not exists, ask IT to deploy to your security role. You will be testing this in non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



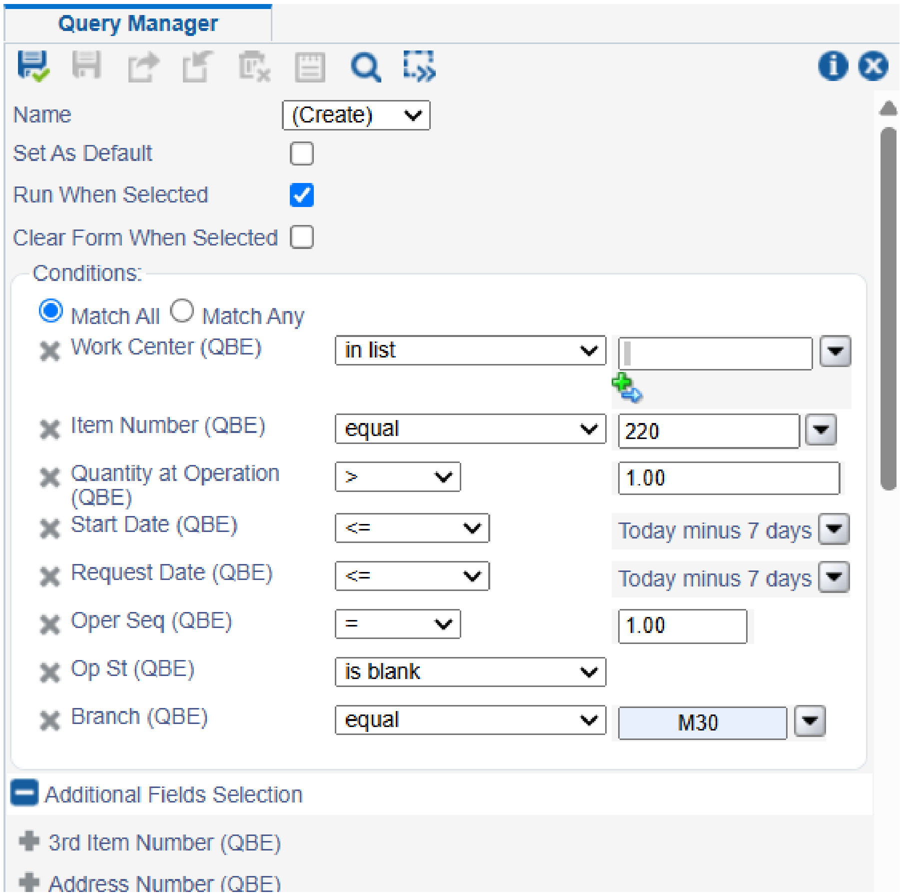
Step 2

Customize the grid (example below), place some QBE values to get valid data points



Step 3

Create a new query. Use the right pane selections to start with. You can focus on critical work center (or the typical last work center in a schedule), with item number or not, quantity at operation >1, start, and request date variations. Operation sequence and status are useful parameters if you are using them.



Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage

Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the oneview sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to the all records option if you feel the watchlist extract is incorrect.

33. Work order Actual threshold $ Alert

Functional Area	Manufacturing
Number	33
Title	Work order Actual threshold $ Alert
Description	Don’t wait till end of the month on the surprises
Purpose	Get alerts on key inventory items. Helps to manage manufacturing accounting better
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

Work order Actual threshold $ Alert

Business Requirement:

In a fast moving manufacturing environment, the work order cycle is short and yet prone to errors. Users may double book the issues (if scanner didn’t work first time) and also issue components against the wrong work orders. Typically companies enable additional material issues, which can be possibly stopped with the change in processing option.

Workorders getting completed and goes to 95 (typically). Manufacturing accounting run at periodic intervals. Scheduled jobs push the status to 96 or 97 based on the configurations/usage. Accountants look at the variance. For any problems, they may push back to 92 or any other accounting use only status.

However, these orders on hold status need to be reviewed at every month end for better book keeping purposes. You don't want to book the variance the next months or many months after regular transactions have happened.

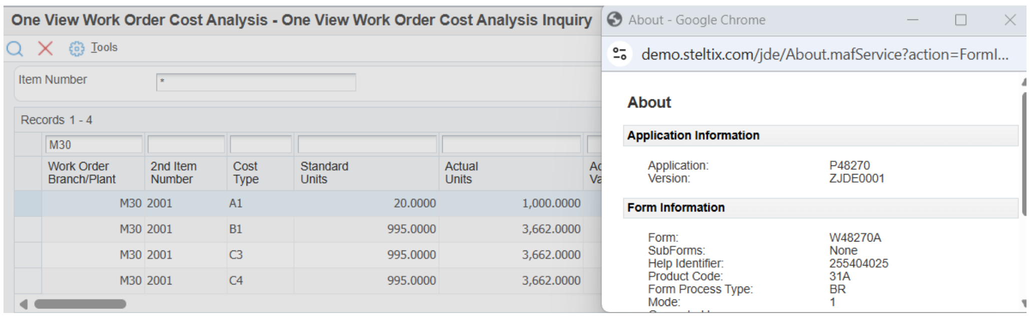
Technology used: UDO watchlist.

Limitations: Ensure you have security access to run this application

Table/Application Used: P48270

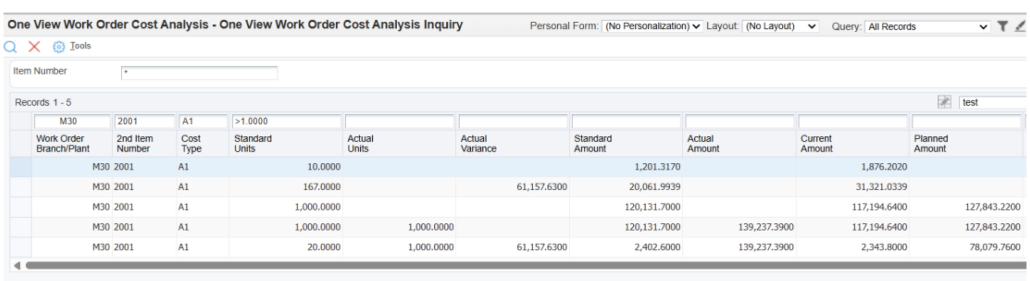
Step 1

Open One View WO cost analysis inquiry application

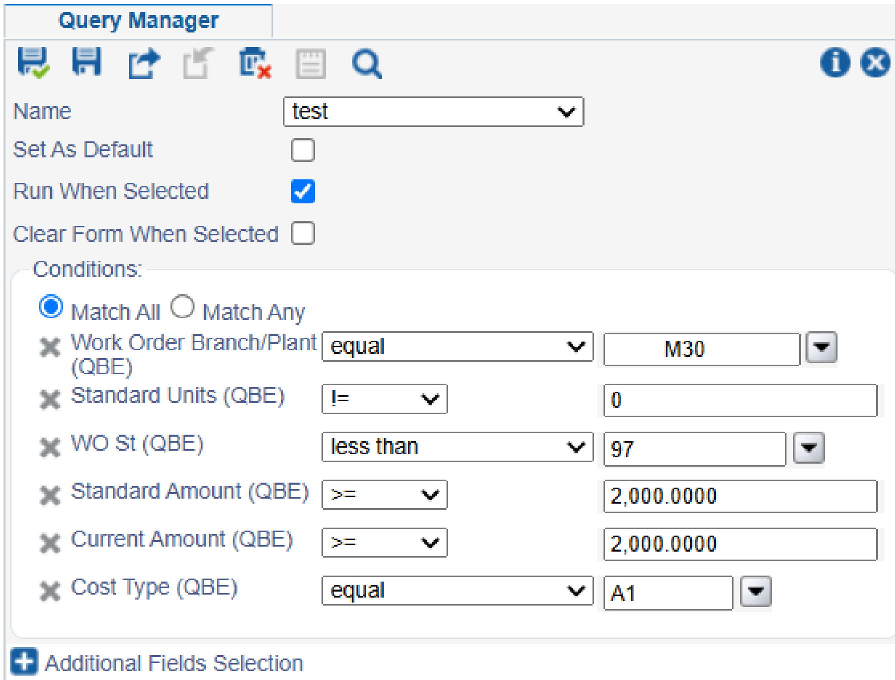


Step 2

Populate some QBE values and create a new query



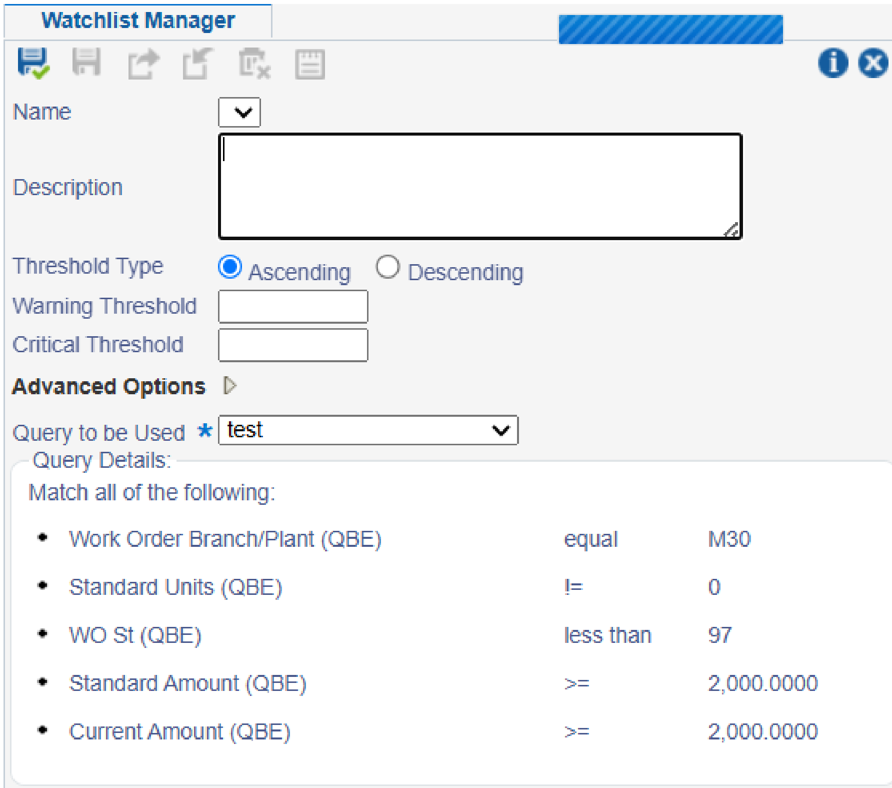
Bigger view of the query manager



Replace the current amount field with actual amount field

Step 3

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



NOTE: This is a very powerful watchlist which can be used in many different combinations.

Standard units, actual units, actual variance at different threshold levels

Standard units, planning units, planned variance at different levels

Similar concept for $ values

It is important manufacturing accounting job run at regular scheduler intervals and not dependent on a user to run it.

34. Work order exception status & age analysis Alert

Functional Area	Manufacturing
Number	34
Title	Work order exception status & age analysis Alert
Description	Don’t wait till end of the month on the surprises
Purpose	Get alerts on key inventory items. Helps to manage manufacturing process better
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

Work order exception status & age analysis Alert

Business Requirement:

You could be the manufacturing supervisor who manages work orders that are processed and completed successfully. If the work order goes through certain steps and then there is a need to hold the workorder from processing, you can either use hold code (or) use a special status like 82 (example). Or sometimes planners use the status like 08 to keep the workorder from NOT getting picked up further into next steps.

Another example, as cost accountant, you push the order status to 92 (example) or keep at 96 and not do variance accounting yet.

This watchlist could be used for variety of reasons and you create each one for the age analysis, like <30 days, ><60 days, ><90days

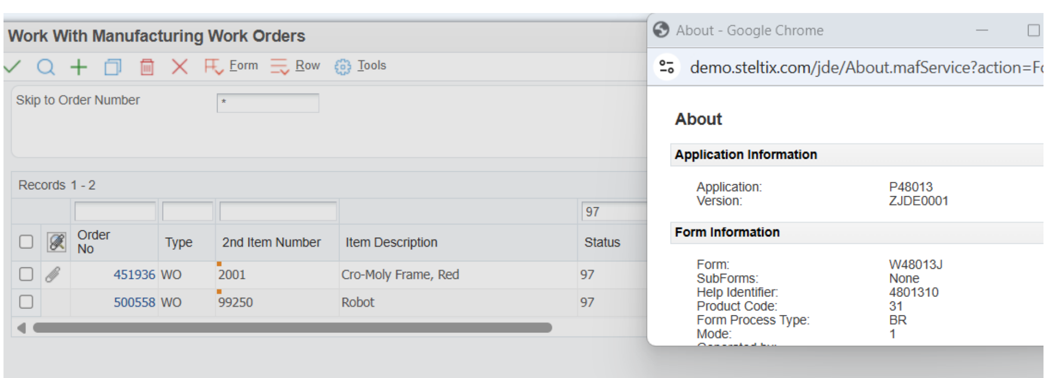
Technology used: UDO watchlist.

Limitations: Ensure you have security access to run this application

Table/Application Used: P48013

Step 1

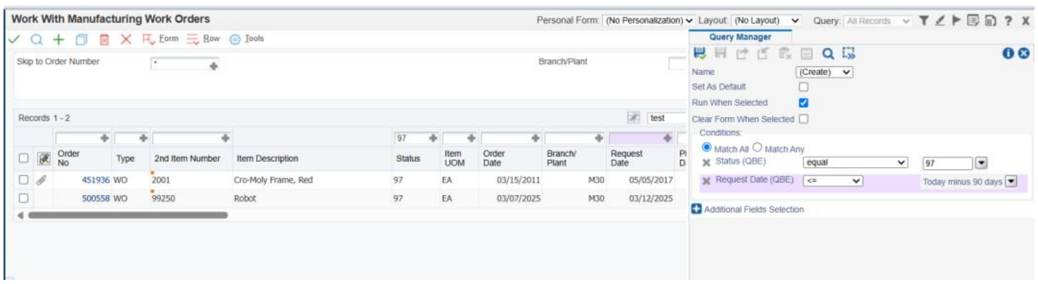
Open Workorder entry application



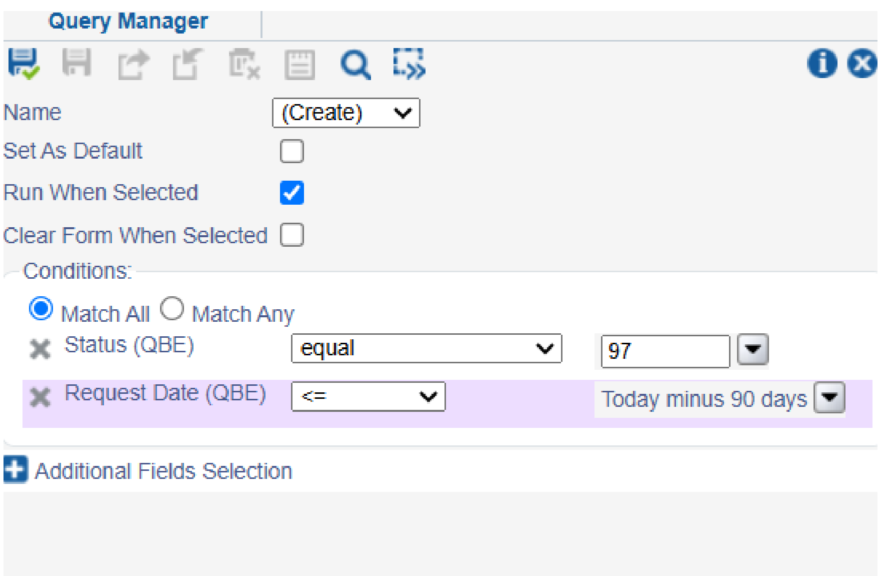
Step 2

Query some QBE values. Create a new inquiry

In this example, status code=97 is used since the demo environment didn't have exception codes.

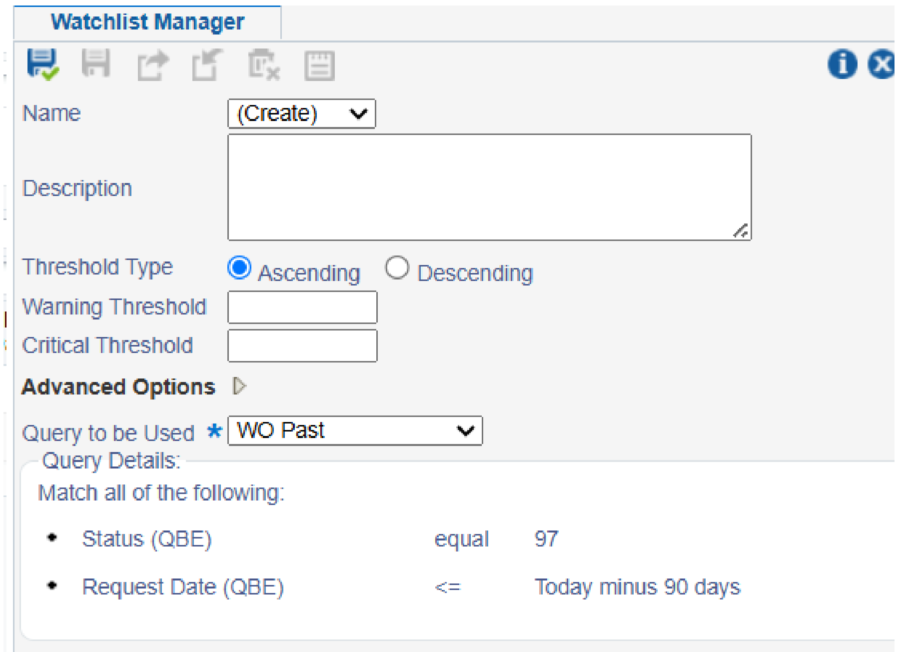


Right pane repeated for clarity view



Step 3

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



NOTE: This is a very powerful watchlist which can be used in many different combinations.

As mentioned you can go creative for different exception status and have separate watch for different days range (30, 60, 90)

If you feel users are using various status codes without the process understanding (because JDE UDC value has them), plan to invoke Work order activity rules in the manufacturing constants. Like other order activity rules, users can’t enter their own UDC code, if the flow is not in WO activity rules.

35. Work Order Scrap Quantity Surprises Alert

Functional Area	Manufacturing
Number	35
Title	Work Order Scrap Quantity Surprises Alert
Description	Don’t wait till end of the month on the surprises
Purpose	Get alerts on key inventory items. Helps to manage manufacturing process better
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

Work Order Scrap Quantity Surprises Alert

Business Requirement:

If you have defined specific scrap percentages in the bill of materials. However, during work order execution things change and usage goes up (typically). This pose surprises to Planners using MRP and Buyers who thought everything is under control. An alert will help the supervisors.

This acts like an exception materials issues list which needs management attention. This query can be combined in a CAFE1 composite to know the entire Work order partslist and WO status.

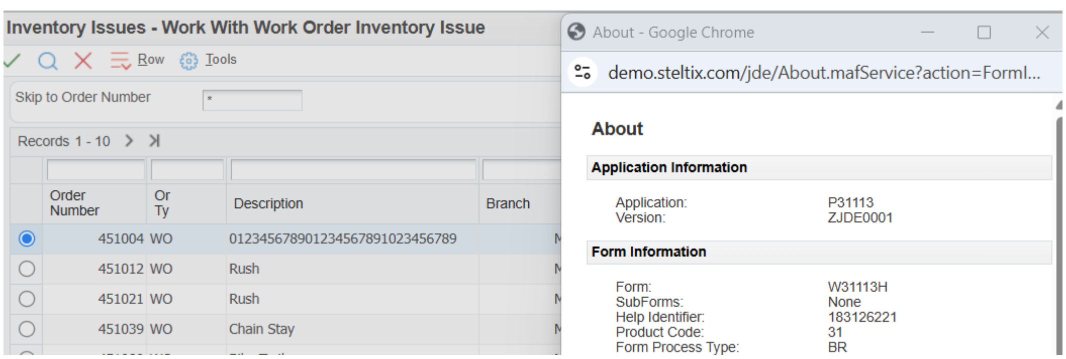
Technology used: Watch list

Limitations: None. Please check security granted to right roles

Table/Application Used: P31113

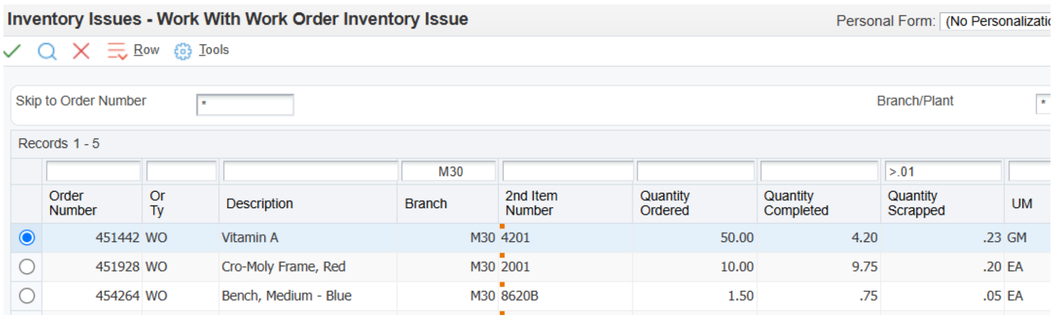
Step 1

Open this application from your menu. If it does not exists, ask IT to deploy to your security role. You will be testing this in non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2

Customize the grid (example below), place some QBE values to get valid data points



Inventory Issues - Work With Work Order Inventory Issue

Personal Form: (No Personalizati

Row Tools

Skip to Order Number *

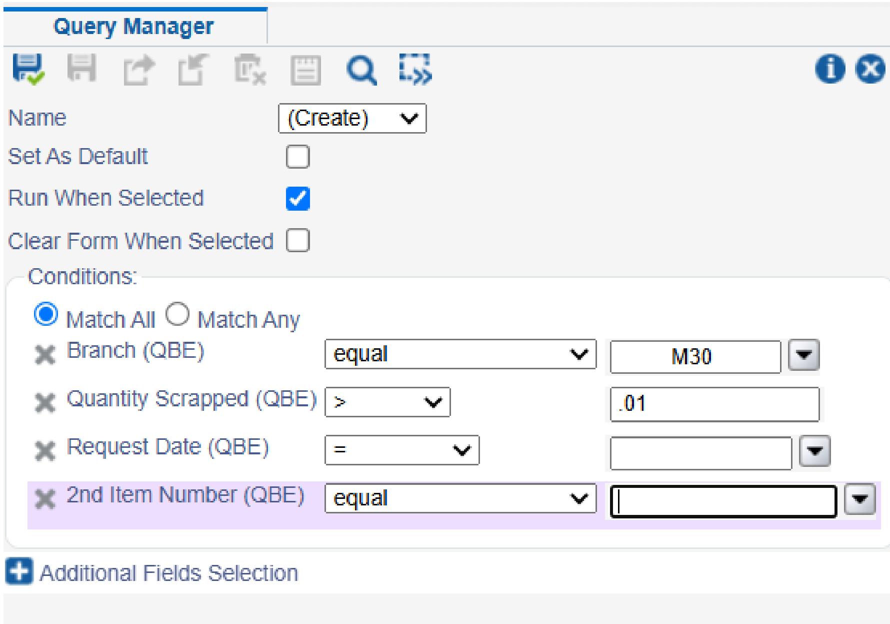
Branch/Plant *

Records 1 - 5

Order Number	Or Ty	Description	Branch	2nd Item Number	Quantity Ordered	Quantity Completed	Quantity Scrapped	UM
			M30				>.01	
451442	WO	Vitamin A	M30	4201	50.00	4.20	.23	GM
451928	WO	Cro-Moly Frame, Red	M30	2001	10.00	9.75	.20	EA
454264	WO	Bench, Medium - Blue	M30	8620B	1.50	.75	.05	EA

Step 3

Create a new query. Use the right pane selections to start with. You can focus on scrap quantity threshold (not necessarily >0.01), request date back dated 30 days behind and list problem components. This application does not have many fields/columns by default. You may need to add more grid customization to get values like WO status, WO parent item, etc.



Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage

Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the oneview sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to the all records option if you feel the watchlist extract is incorrect.

36. Work order Variance B cost type threshold $ Alert

Functional Area	Manufacturing
Number	36
Title	Work order Variance B cost type threshold $ Alert
Description	Don't wait till end of the month on the surprises
Purpose	Get alerts on key inventory items. Helps to manage manufacturing process better
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

Work order Variance B cost type threshold $ Alert

Business Requirement:

In a fast moving manufacturing environment, the work order cycle is short and yet prone to errors. Users may double book the issues (if scanner didn't work first time) and also issue components against the wrong work orders. Typically companies enable additional material issues, which can be possibly stopped with the change in processing option.

Work orders getting completed and goes to 95 (typically). Manufacturing accounting run at periodic intervals. Scheduled jobs push the status to 96 or 97 based on the configurations/usage. Accountants look at the variance. For any problems, they may push back to 92 or any other accounting use only status.

However, these orders on hold status need to be reviewed at every month end for better book keeping purposes. You don't want to book the variance the next months or many months after regular transactions have happened.

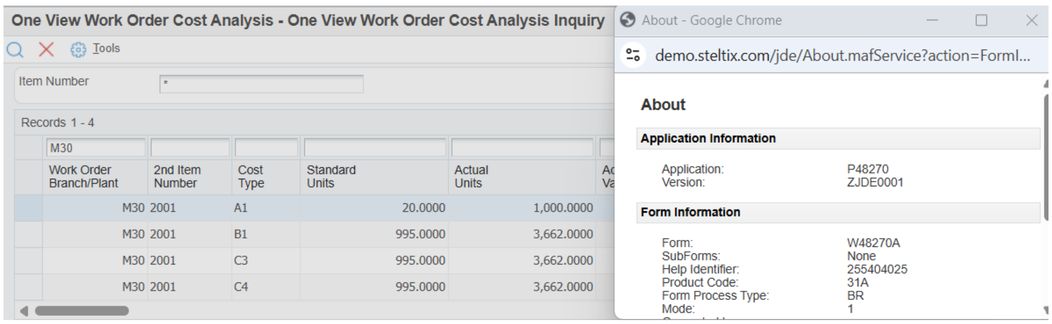
Technology used: UDO watchlist.

Limitations: Ensure you have security access to run this application

Table/Application Used: P48270

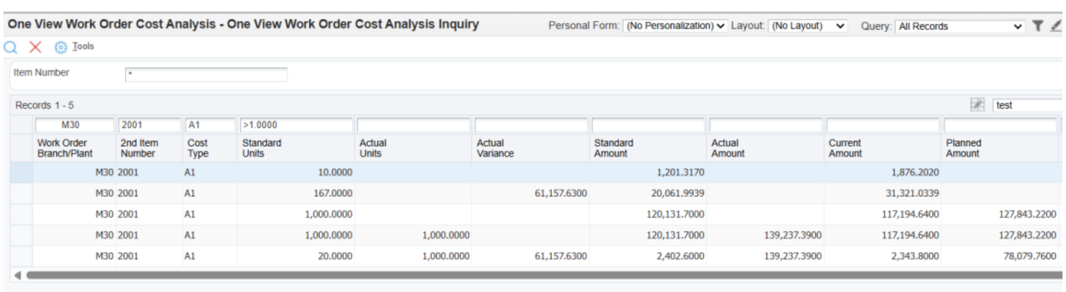
Step 1

Open One View WO cost analysis inquiry application

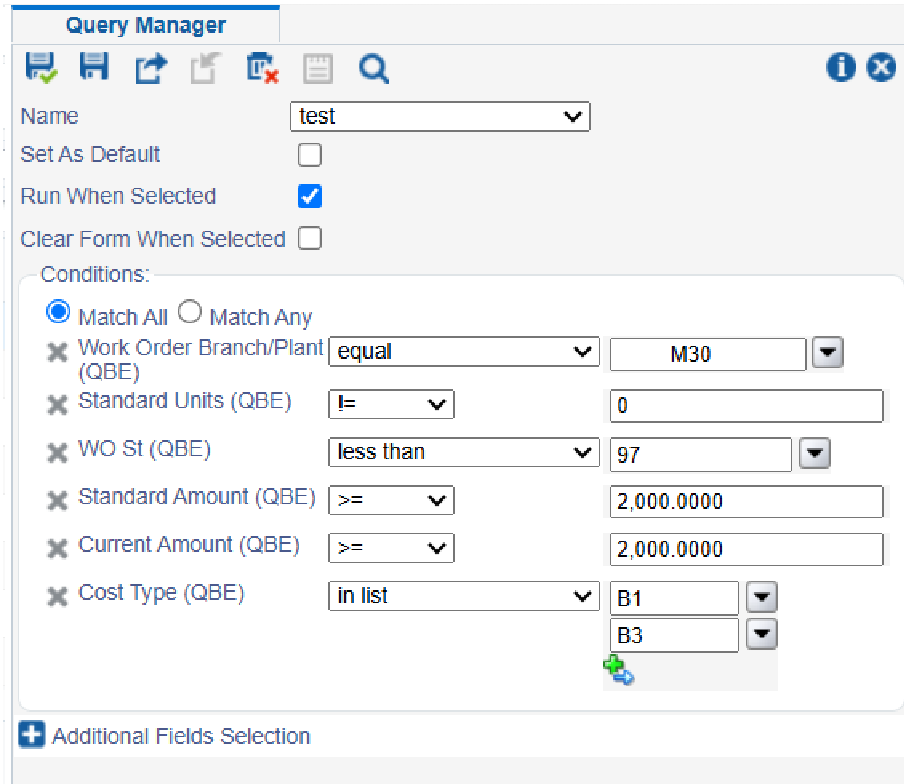


Step 2

Populate some QBE values and create a new query

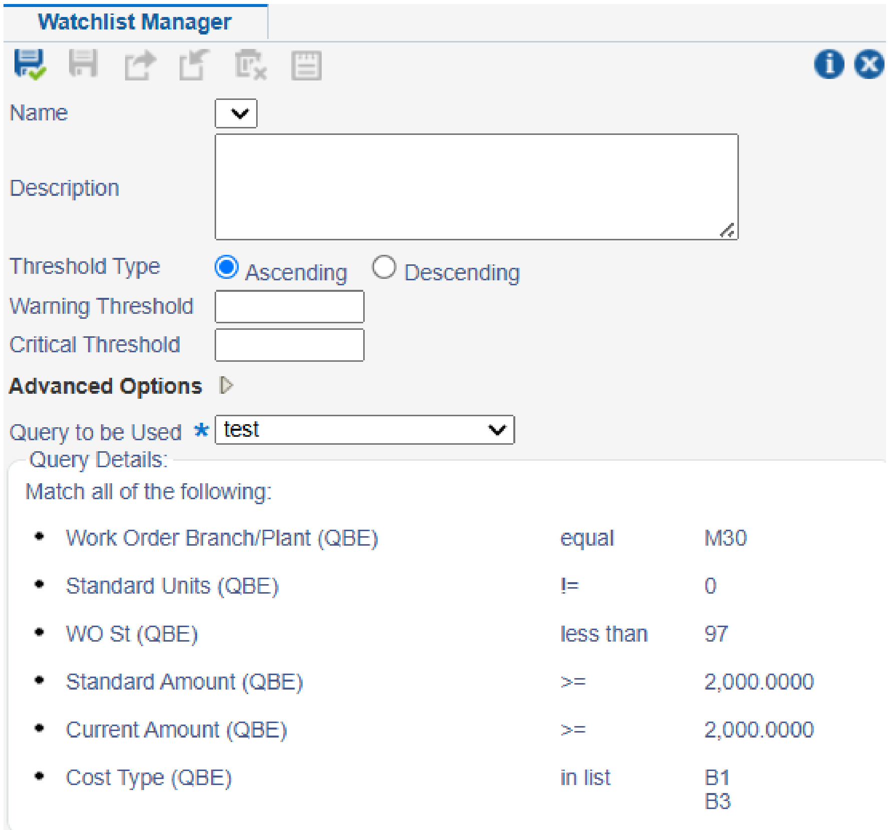


Bigger view of the query manager



Step 3

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



NOTE: This is a very powerful watchlist which can be used in many different combinations.

Standard units, actual units, actual variance at different threshold levels

Standard units, planning units, planned variance at different levels

Similar concept for $ values

It is important manufacturing accounting job run at regular scheduler intervals and not dependent on a user to run it.

37. Work order Variance C cost type threshold $ Alert

Functional Area	Manufacturing
Number	37
Title	Work order Variance C cost type threshold $ Alert
Description	Don’t wait till end of the month on the surprises
Purpose	Get alerts on key inventory items. Helps to manage manufacturing process better
Contents	Watch list
	You can also invoke orchestrator to start the watchlist into notification section. This is optional

Work order Variance C cost type threshold $ Alert

Business Requirement:

In a fast moving manufacturing environment, the work order cycle is short and yet prone to errors. Users may double book the issues (if scanner didn’t work first time) and also issue components against the wrong work orders. Typically companies enable additional material issues, which can be possibly stopped with the change in processing option.

Workorders getting completed and goes to 95 (typically). Manufacturing accounting run at periodic intervals. Scheduled jobs push the status to 96 or 97 based on the configurations/usage. Accountants look at the variance. For any problems, they may push back to 92 or any other accounting use only status.

However, these orders on hold status need to be reviewed at every month end for better book keeping purposes. You don't want to book the variance the next months or many months after regular transactions have happened.

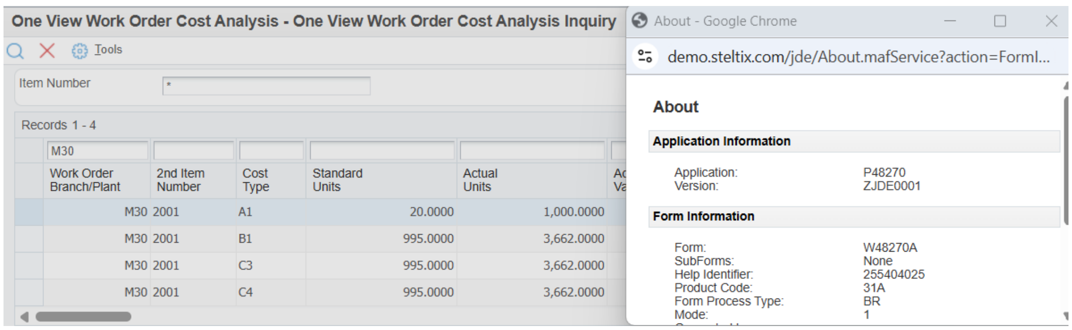
Technology used: UDO watchlist.

Limitations: Ensure you have security access to run this application

Table/Application Used: P48270

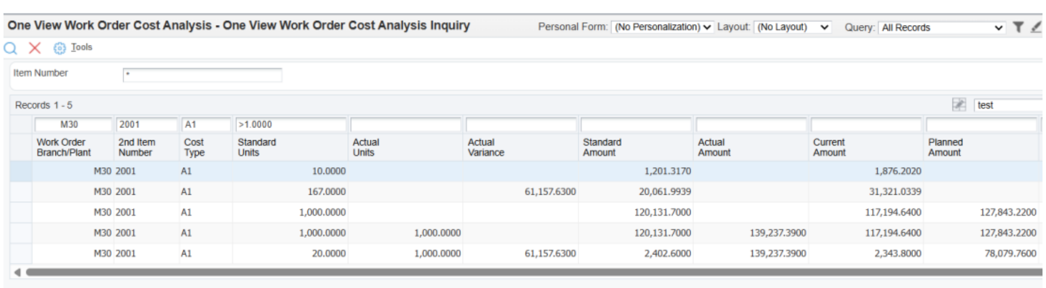
Step 1

Open One View WO cost analysis inquiry application

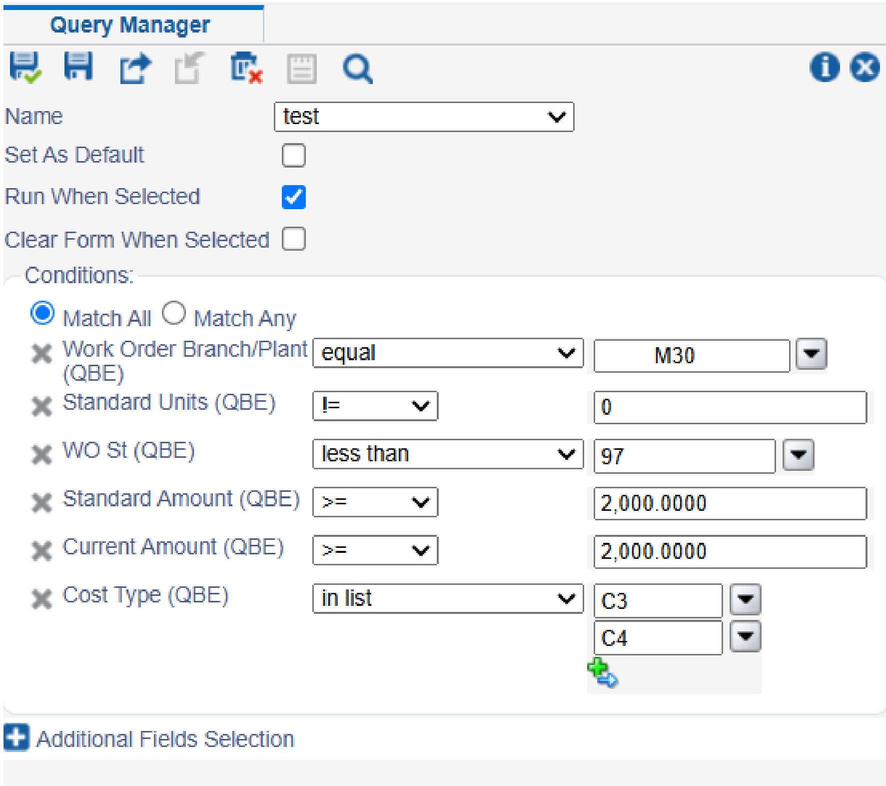


Step 2

Populate some QBE values and create a new query

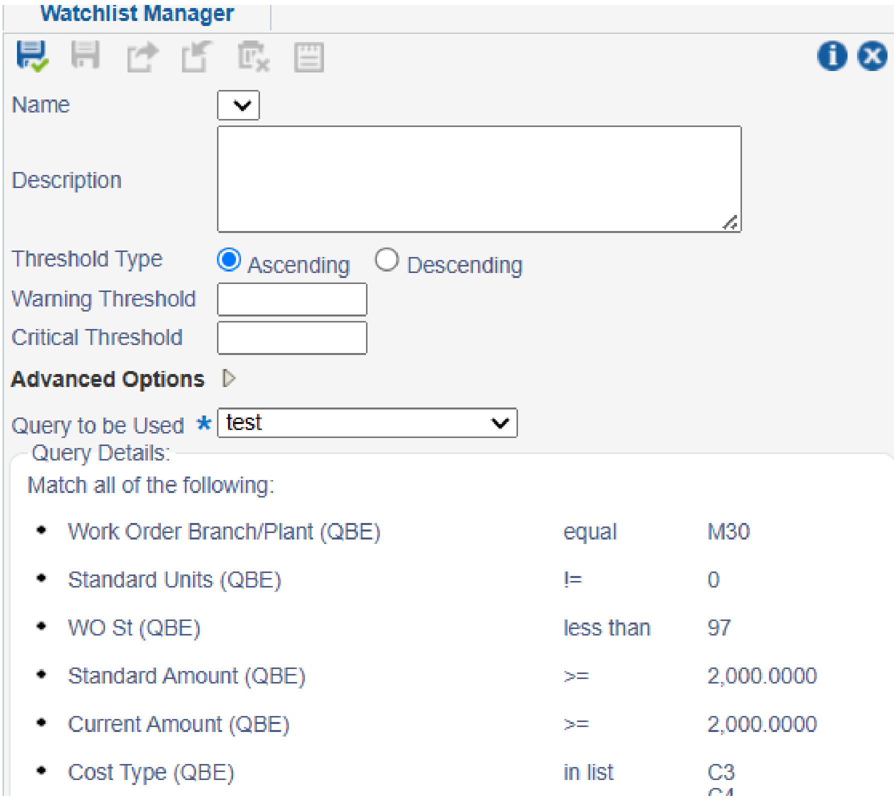


Bigger view of the query manager



Step 3

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



NOTE: This is a very powerful watchlist which can be used in many different combinations.

Standard units, actual units, actual variance at different threshold levels

Standard units, planning units, planned variance at different levels

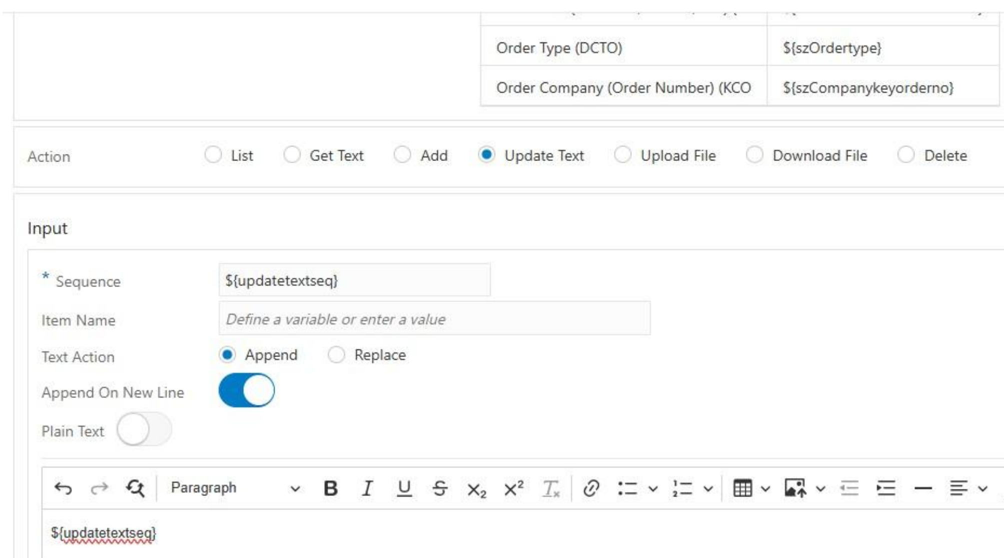
Similar concept for $ values

It is important manufacturing accounting job run at regular scheduler intervals and not dependent on a user to run it.

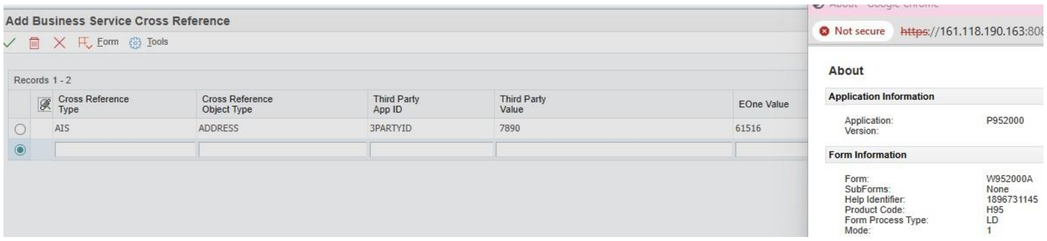
ORCHESTRATOR EXAMPLES

Various tools within orchestrator module are explained in this section with examples. It is expected that user has basic understanding and hands-on exposure to these tools. The primary objective of the book is to give business cases and not deep dive in creating solutions to the business cases since each customer environment is unique and totally different!

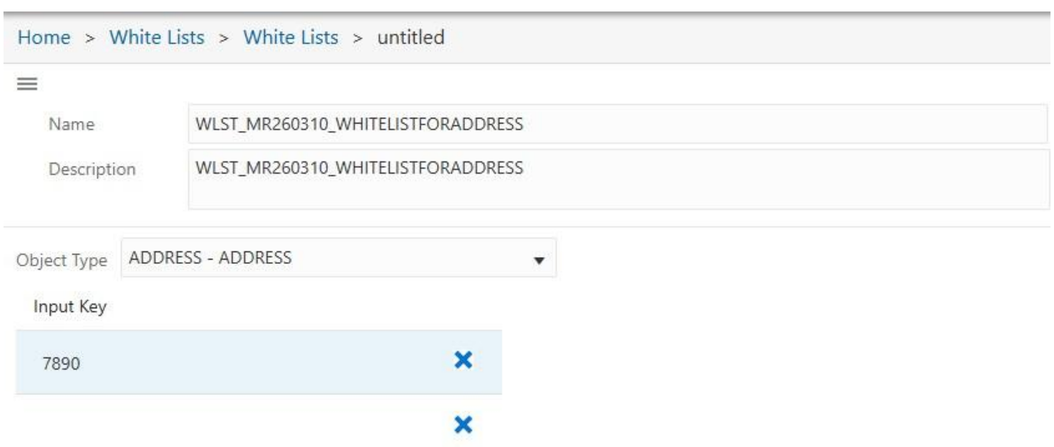
Update Text example

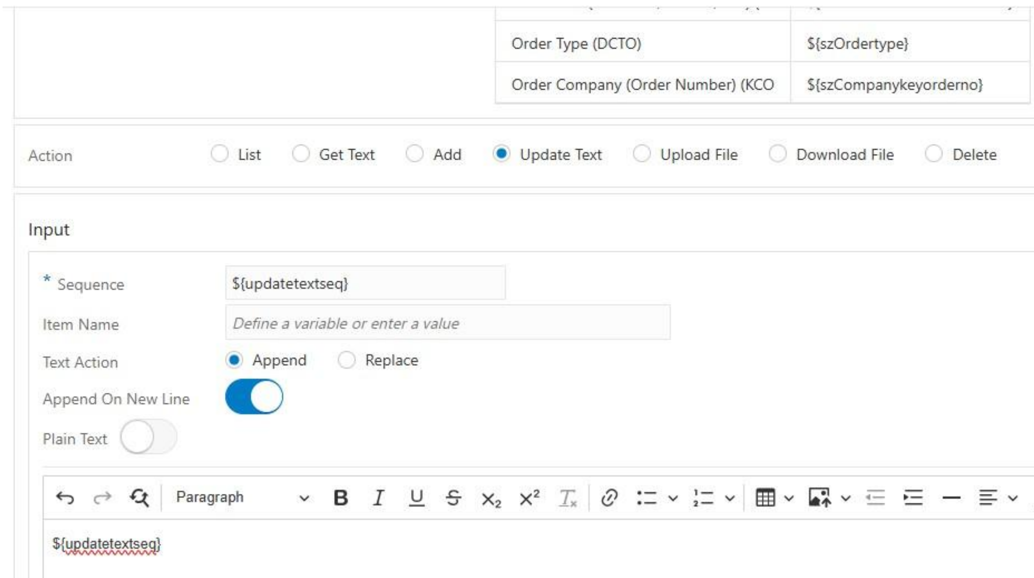


Adding business cross reference example

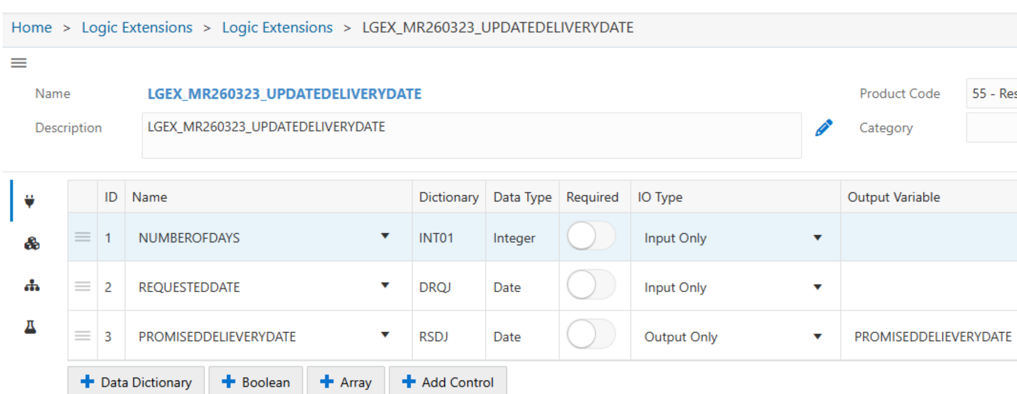


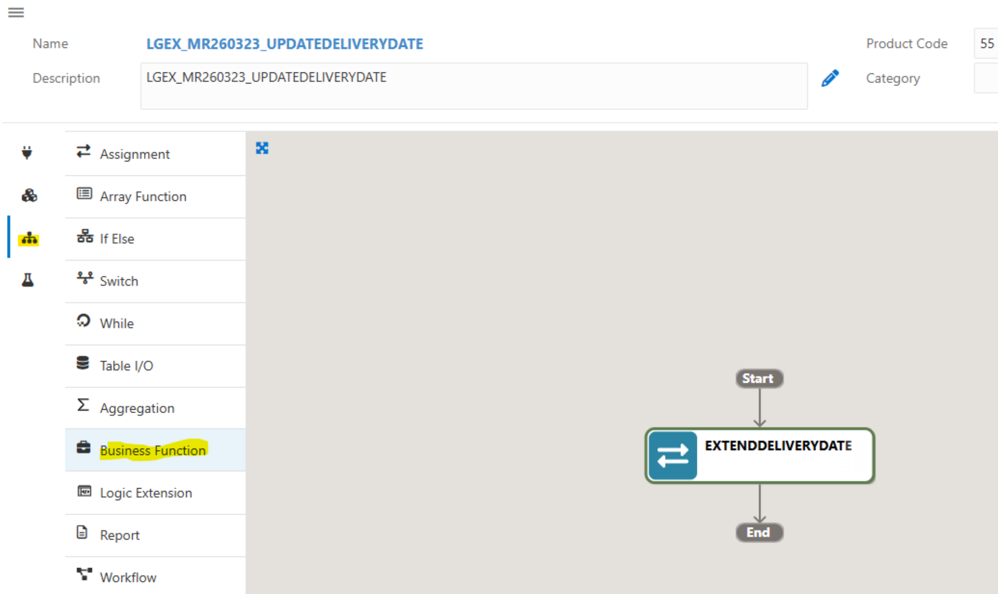
Watchlist within Orchestrator Example

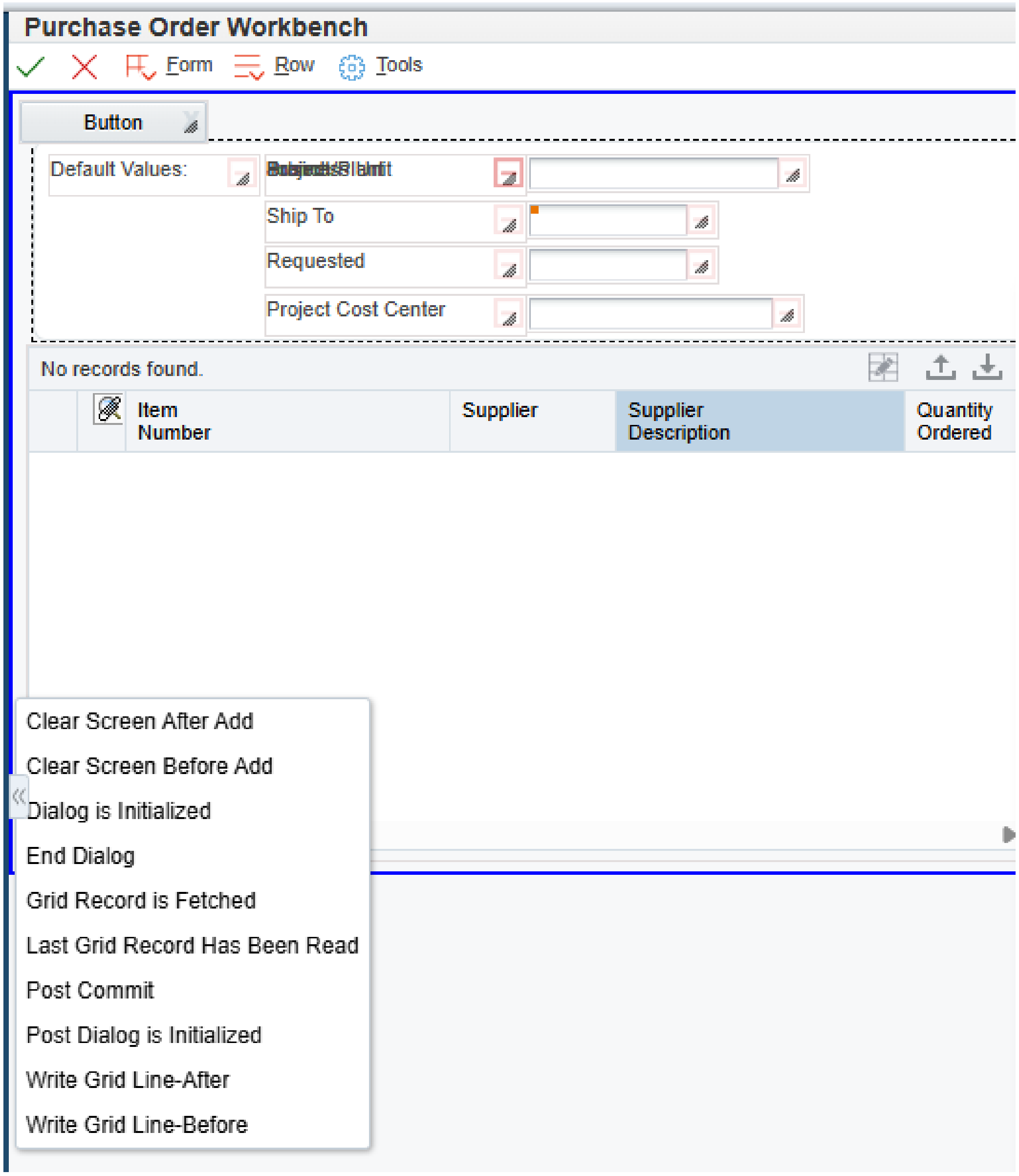


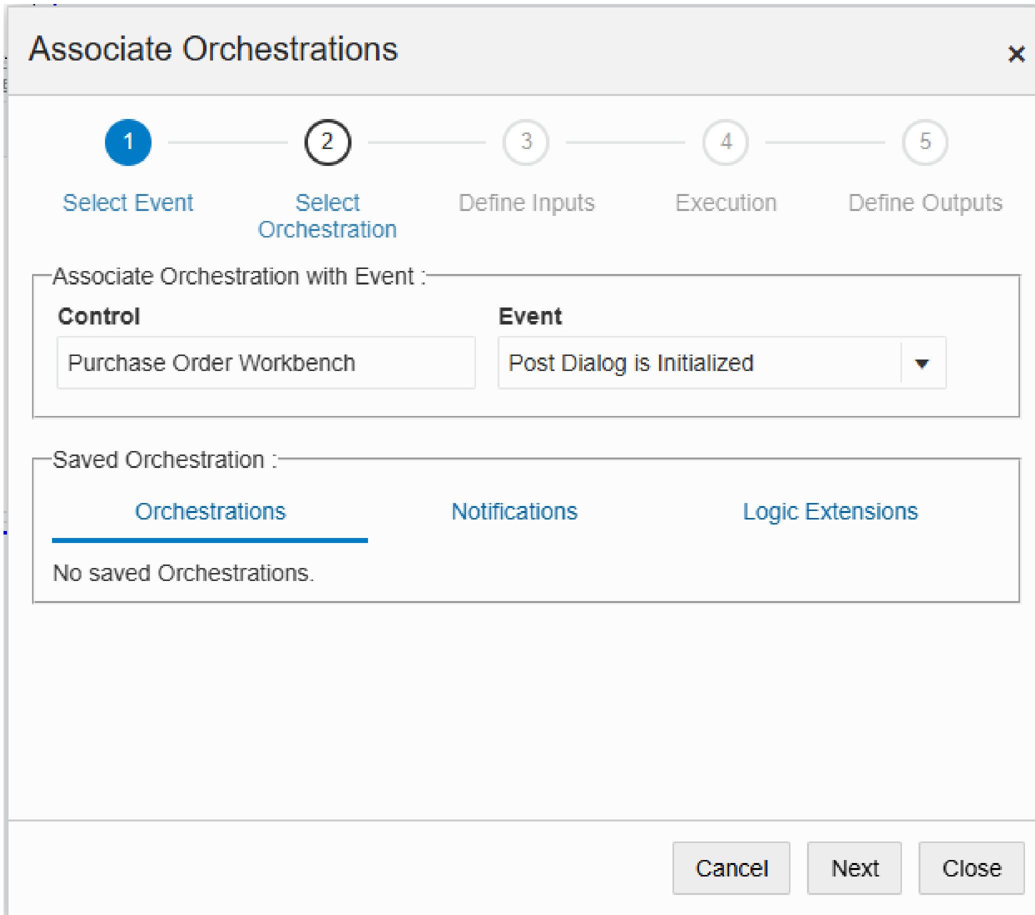


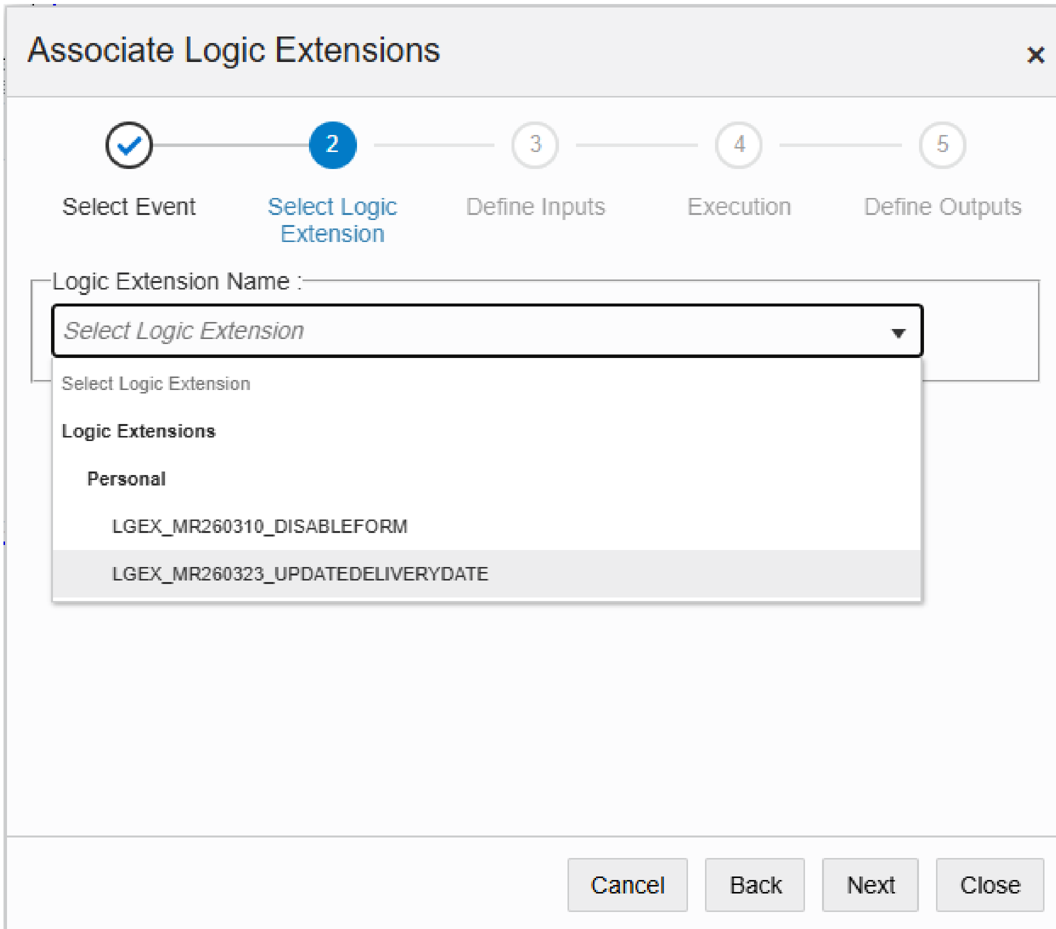
Logic attached to Form Extension Example

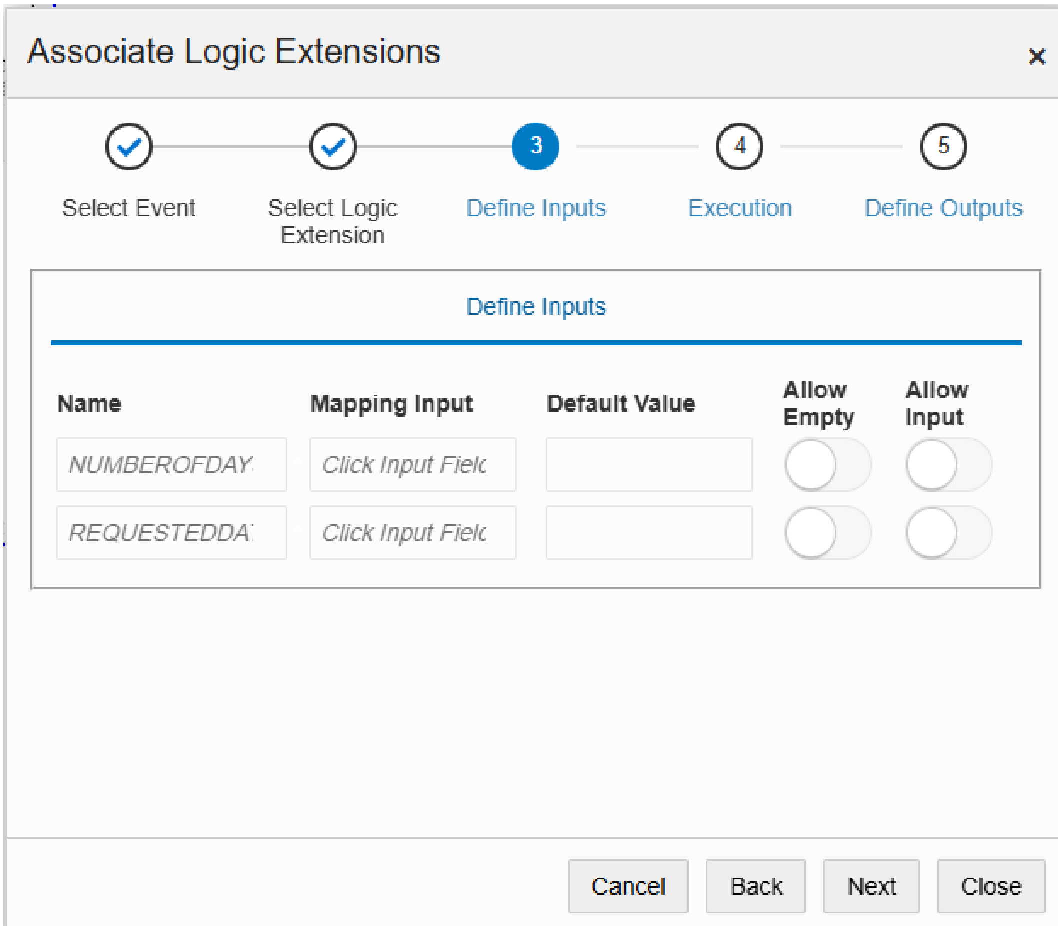



Name
LGEX_MR260323_UPDATEDELIVERYDATE
Product Code
55
Description
LGEX_MR260323_UPDATEDELIVERYDATE
Category
Assignment
Array Function
If Else
Switch
While
Table I/O
Aggregation
Business Function
Logic Extension
Report
Workflow
Start
EXTENDDELIVERYDATE
End

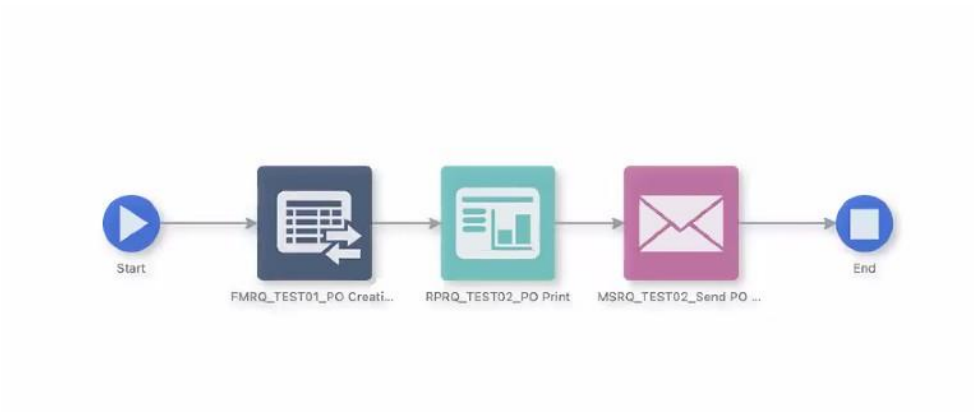

Purchase Order Workbench
Form
Row
Tools
Button
Default Values:
Ship To
Requested
Project Cost Center
No records found.
Item Number
Supplier
Supplier Description
Quantity Ordered
Clear Screen After Add
Clear Screen Before Add
Dialog is Initialized
End Dialog
Grid Record is Fetched
Last Grid Record Has Been Read
Post Commit
Post Dialog is Initialized
Write Grid Line-After
Write Grid Line-Before


Associate Orchestrations
1
2
3
4
5
Select Event
Select Orchestration
Define Inputs
Execution
Define Outputs
Associate Orchestration with Event :
Control
Event
Purchase Order Workbench
Post Dialog is Initialized
Saved Orchestration :
Orchestrations
Notifications
Logic Extensions
No saved Orchestrations.
Cancel
Next
Close

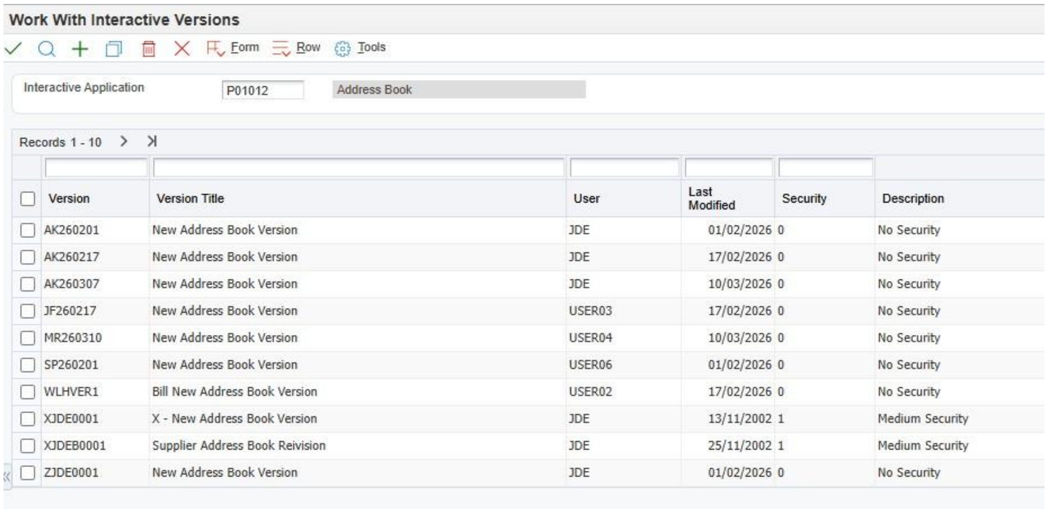

Associate Logic Extensions
Select Event
Select Logic Extension
Define Inputs
Execution
Define Outputs
Logic Extension Name :
Select Logic Extension
Select Logic Extension
Logic Extensions
Personal
LGEX_MR260310_DISABLEFORM
LGEX_MR260323_UPDATEDELIVERYDATE
Cancel
Back
Next
Close


Associate Logic Extensions
Select Event
Select Logic Extension
Define Inputs
Execution
Define Outputs
Define Inputs
Name
Mapping Input
Default Value
Allow Empty
Allow Input
NUMBEROFDAY
Click Input Fielc
REQUESTEDDA
Click Input Fielc
Cancel
Back
Next
Close

Orchestrator Flow Example



Disabling certain fields in a custom application version example

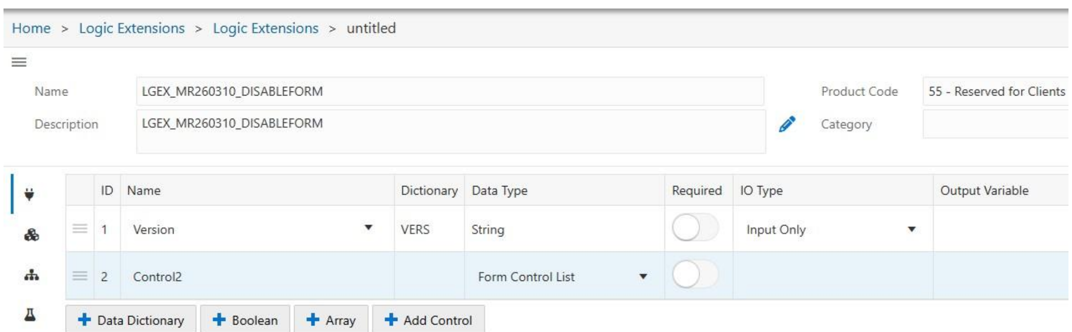


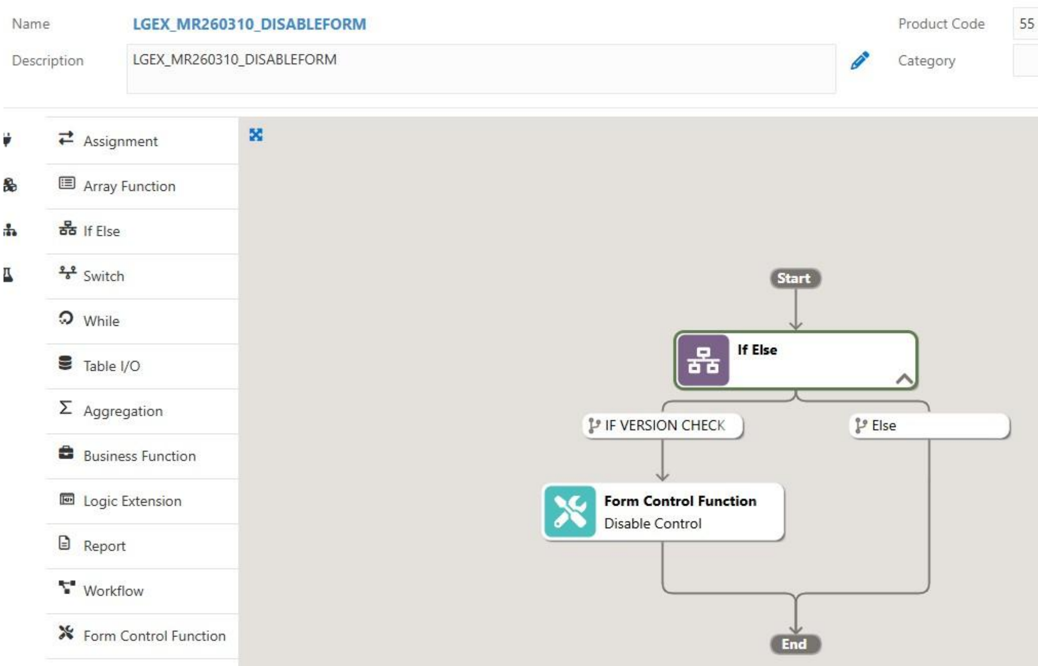
Work With Interactive Versions

Interactive Application P01012 Address Book

Records 1 - 10

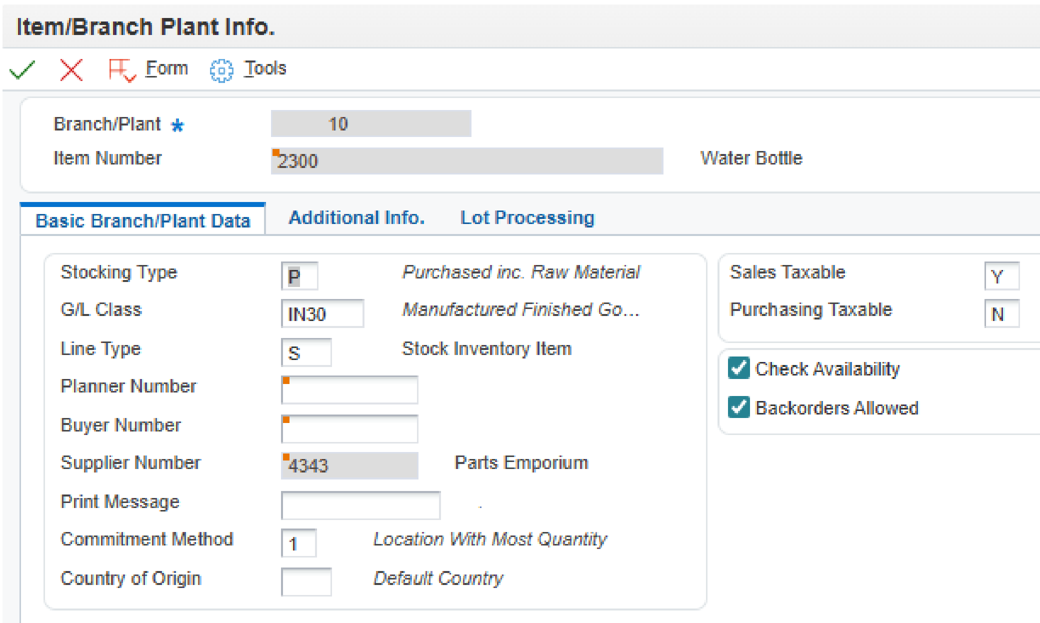
Version	Version Title	User	Last Modified	Security	Description
AK260201	New Address Book Version	JDE	01/02/2026	0	No Security
AK260217	New Address Book Version	JDE	17/02/2026	0	No Security
AK260307	New Address Book Version	JDE	10/03/2026	0	No Security
JF260217	New Address Book Version	USER03	17/02/2026	0	No Security
MR260310	New Address Book Version	USER04	10/03/2026	0	No Security
SP260201	New Address Book Version	USER06	01/02/2026	0	No Security
WLHVER1	Bill New Address Book Version	USER02	17/02/2026	0	No Security
XJDE0001	X - New Address Book Version	JDE	13/11/2002	1	Medium Security
XJDEB0001	Supplier Address Book Reivision	JDE	25/11/2002	1	Medium Security
ZJDE0001	New Address Book Version	JDE	01/02/2026	0	No Security




Name
LGEX_MR260310_DISABLEFORM
Product Code
55
Description
LGEX_MR260310_DISABLEFORM
Category
Assignment
Array Function
If Else
Switch
While
Table I/O
Aggregation
Business Function
Logic Extension
Report
Workflow
Form Control Function
Start
If Else
IF VERSION CHECK
Else
Form Control Function
Disable Control
End


Form Control Function
Actions
Label
Form Control Function
Description
Disable Control
Function Name
Disable Control
Control
Control2
The Form Control function will execute only when this logic extension is called directly from a from extension. If this logic extension is included in an orchestration, the Form Control function will have no effect.

Example of Item branch supplier field suppressed in a version.

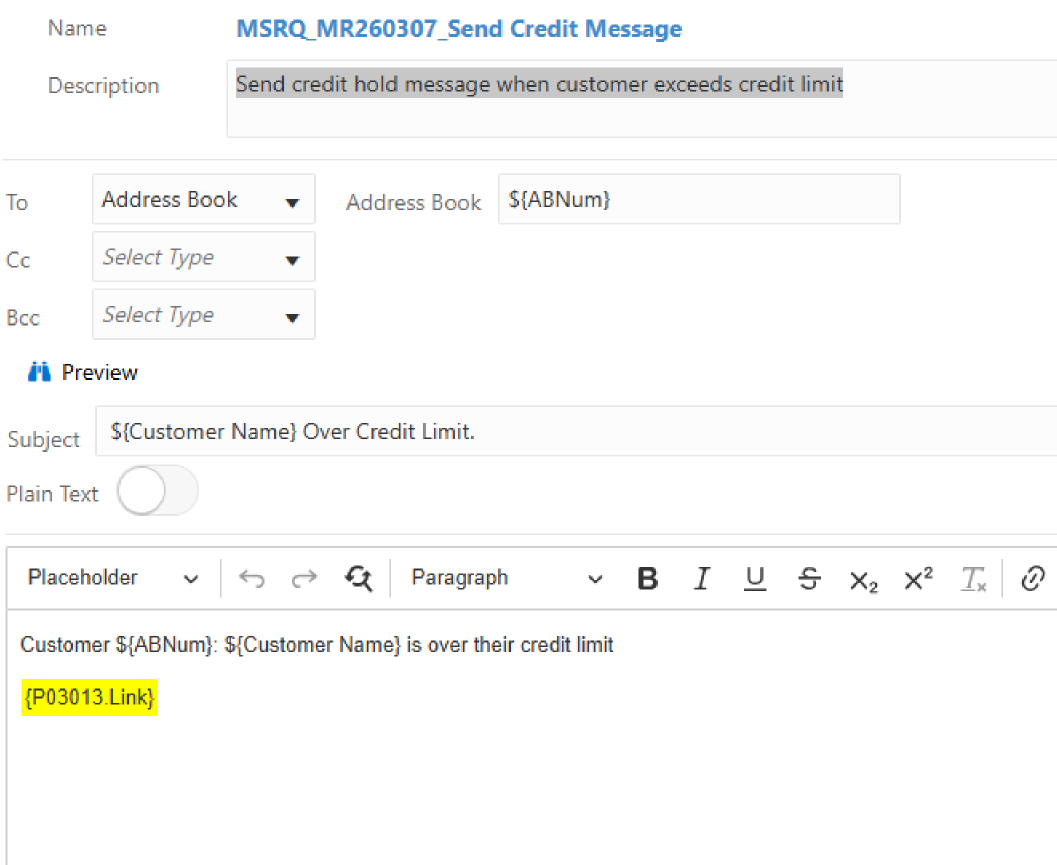


Send credit hold message when customer exceeds credit limit

Name: MSRQ_MR260307_Send Credit Message

Description: Send credit hold message when customer exceeds credit limit

Purpose:



Links - 1

Application Links - 1

Add

Customer Master Revision

Application Link ID: P03013

Application: P03013

Version Variable

Form: W03013B - Customer Master Revision

Version: ZJDE0001 - Customer Master - Redesign

Link Text: Customer Master Revision

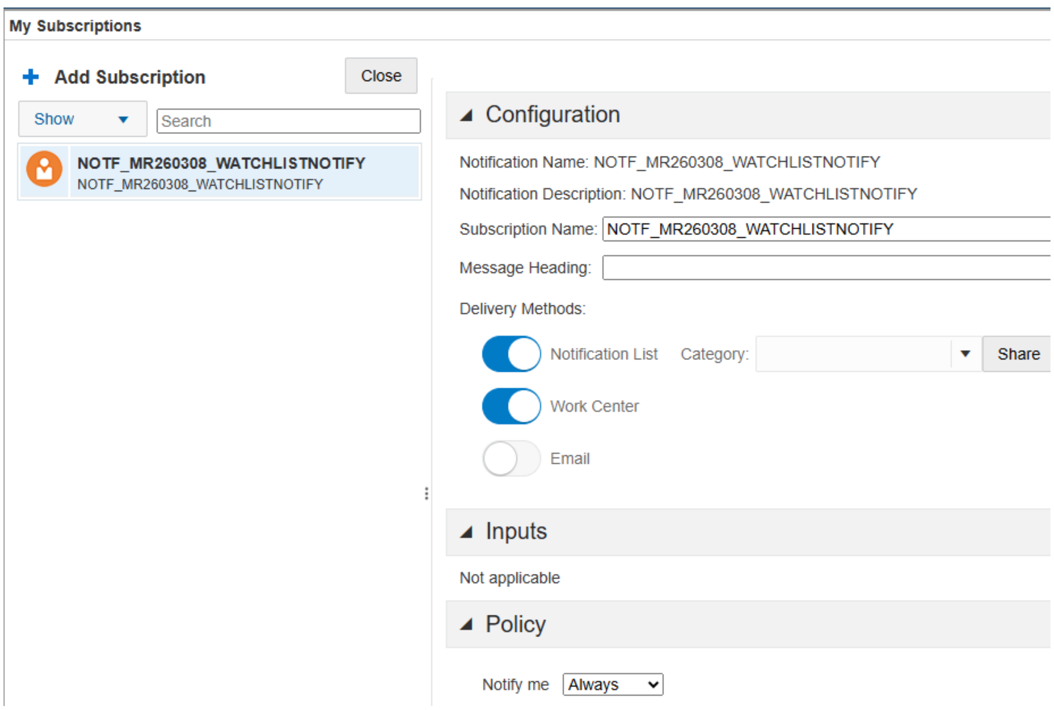
ID	Name	Description	Form Interconnect Value
7	mnAddressNumber	Address Number (AN8)	${ABNum}
8	szCompany	Company (CO)	
11	mn_Tab_ToGoTo	Math Numeric 01 (MATH01)	00000
12	szCountryForPayroll	Country Code (CCPR)	

Scheduler example

Name: SCHD_MR260308_EVERY5MIN

Description: SCHD_MR260308_EVERY5MIN

Purpose:

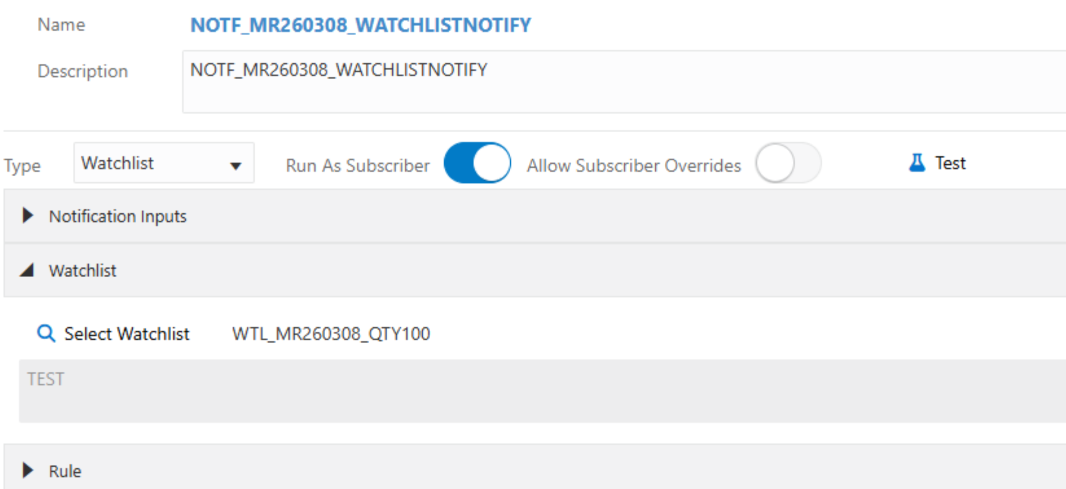


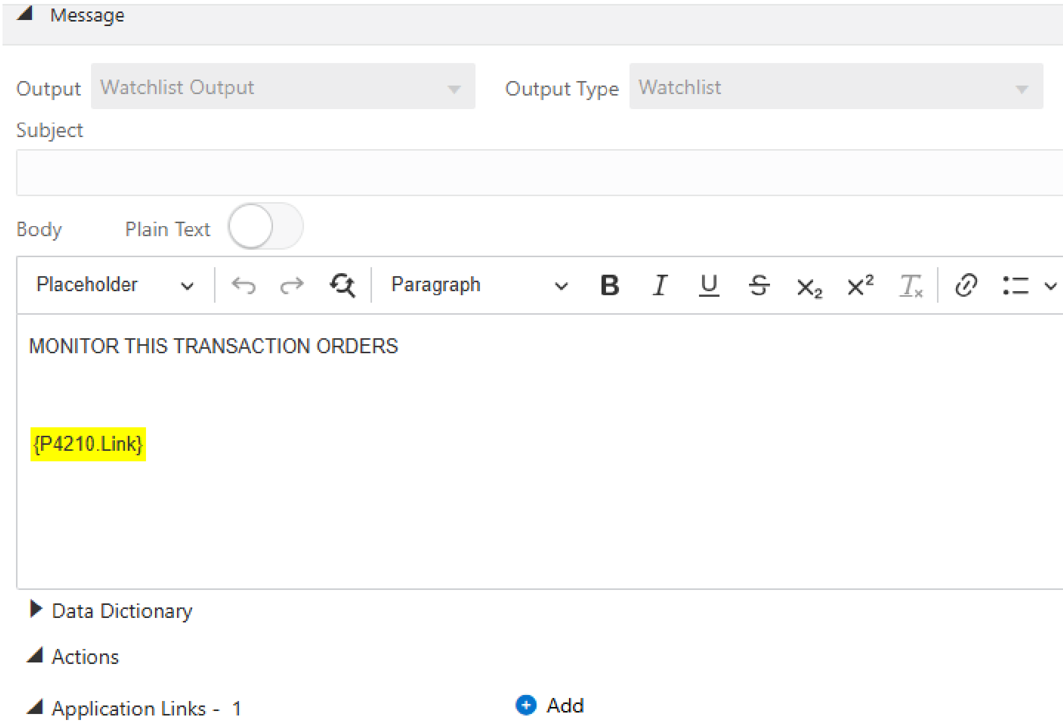
Watchlist notification within orchestrator example

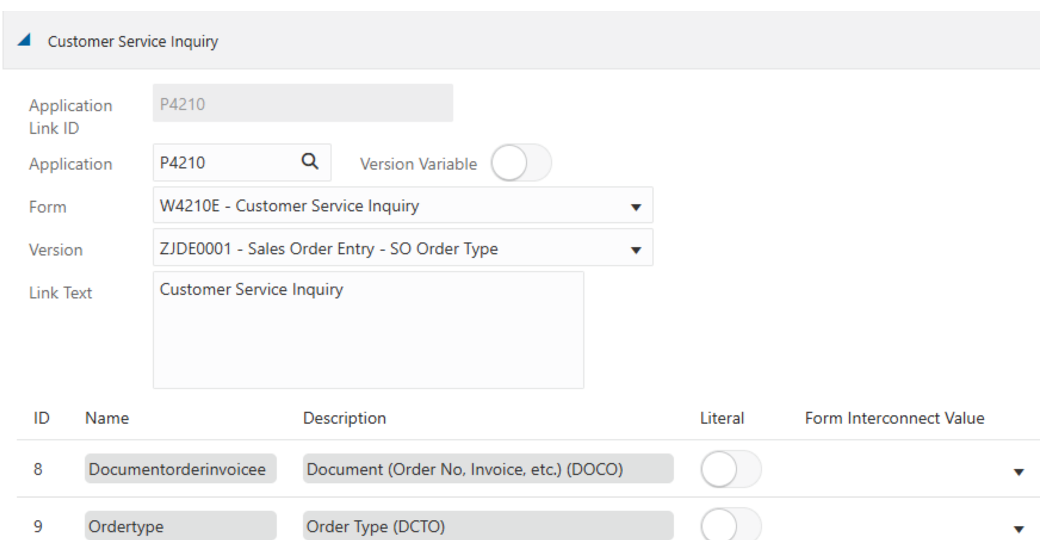
Name: NOTF_MR260308_WATCHLISTNOTIFY

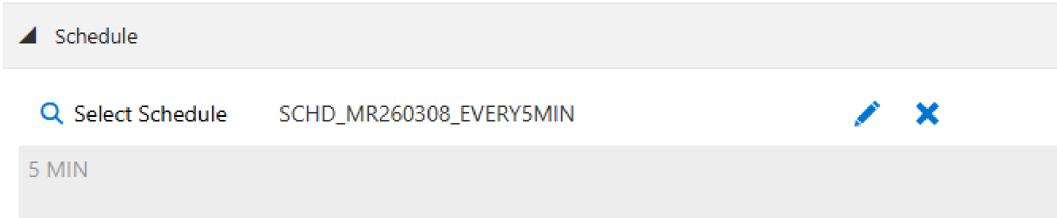
Description: NOTF_MR260308_WATCHLISTNOTIFY

Purpose:




Message
Output
Watchlist Output
Output Type
Watchlist
Subject
Body
Plain Text
Placeholder
Paragraph
MONITOR THIS TRANSACTION ORDERS
{P4210.Link}
Data Dictionary
Actions
Application Links - 1
Add

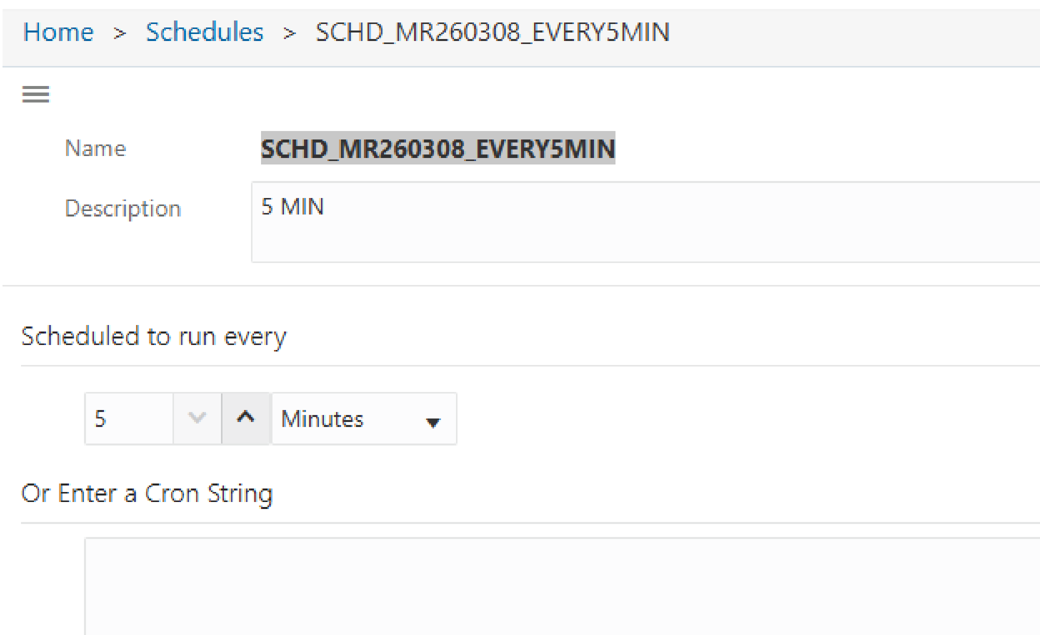

Customer Service Inquiry
Application Link ID
P4210
Application
P4210
Version Variable
Form
W4210E - Customer Service Inquiry
Version
ZJDE0001 - Sales Order Entry - SO Order Type
Link Text
Customer Service Inquiry
ID
Name
Description
Literal
Form Interconnect Value
8
Documentorderinvoicee
Document (Order No, Invoice, etc.) (DOCO)
9
Ordertype
Order Type (DCTO)



Name: SCHD_MR260308_EVERY5MIN

Description: SCHD_MR260308_EVERY5MIN

Purpose:

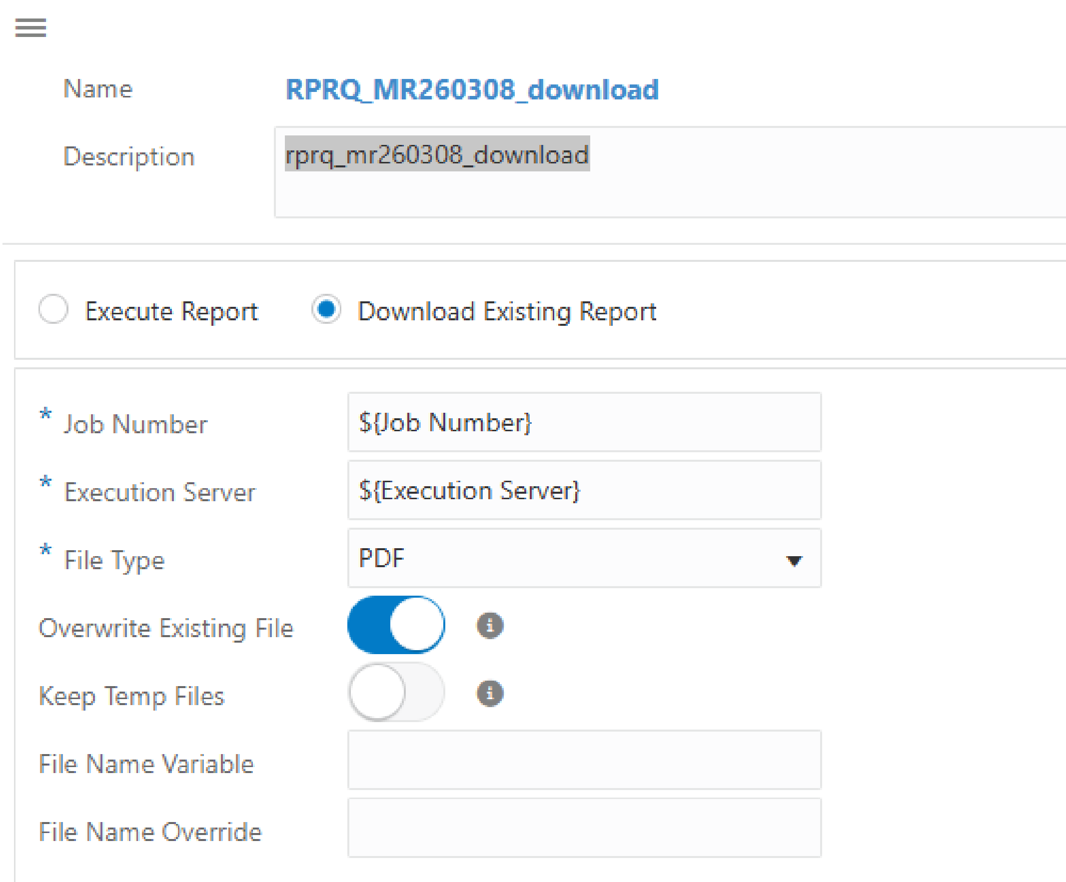


Report download example

Name: RPRQ_MR260308_download

Description: rprq_mr260308_download

Purpose:

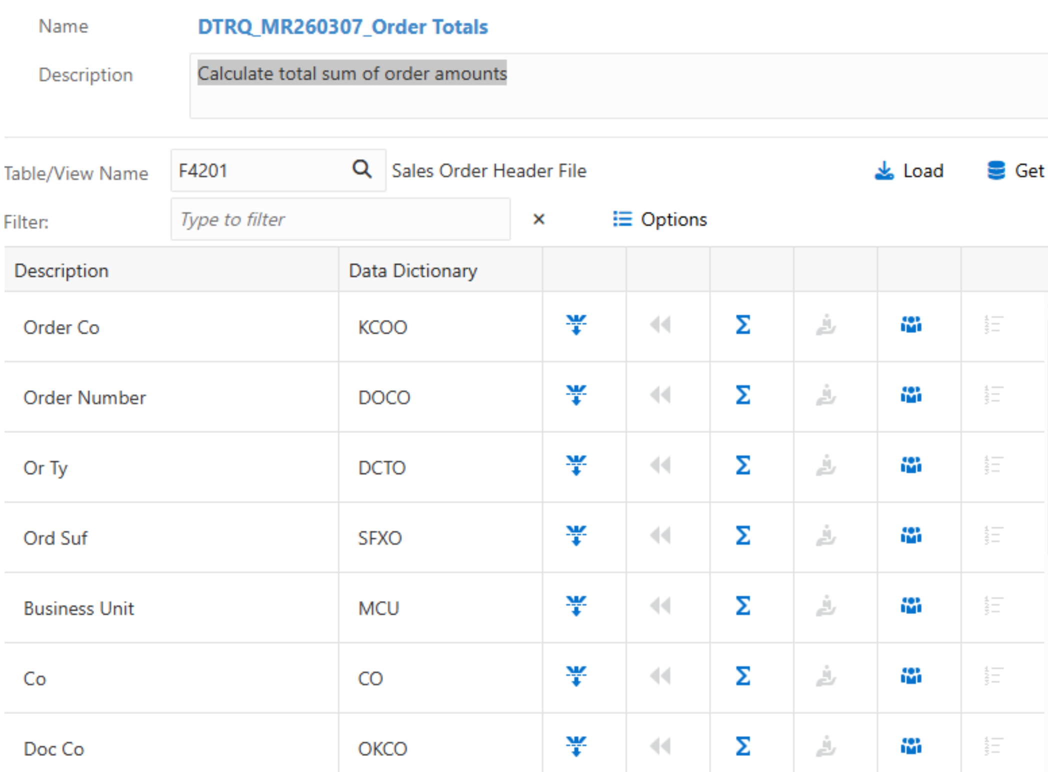


Data request example

Name: DTRQ_MR260307_Order Totals

Description: Calculate total sum of order amounts

Purpose:



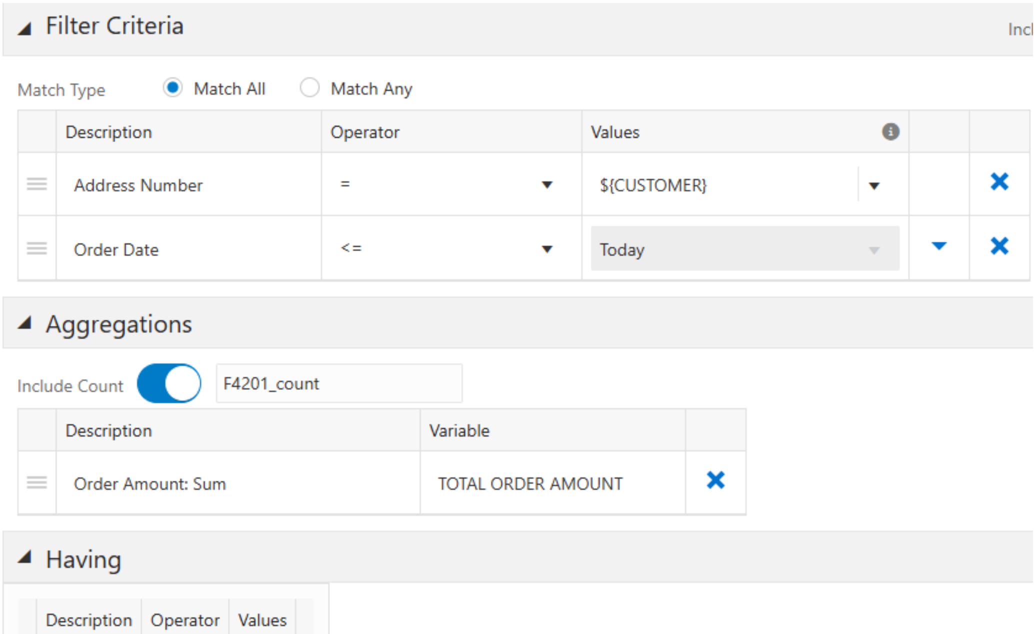
Name DTRQ_MR260307_Order Totals

Description Calculate total sum of order amounts

Table/View Name F4201 Sales Order Header File Load Get

Filter: Type to filter × Options

Description	Data Dictionary
Order Co	KCOO
Order Number	DOCO
Or Ty	DCTO
Ord Suf	SFXO
Business Unit	MCU
Co	CO
Doc Co	OKCO

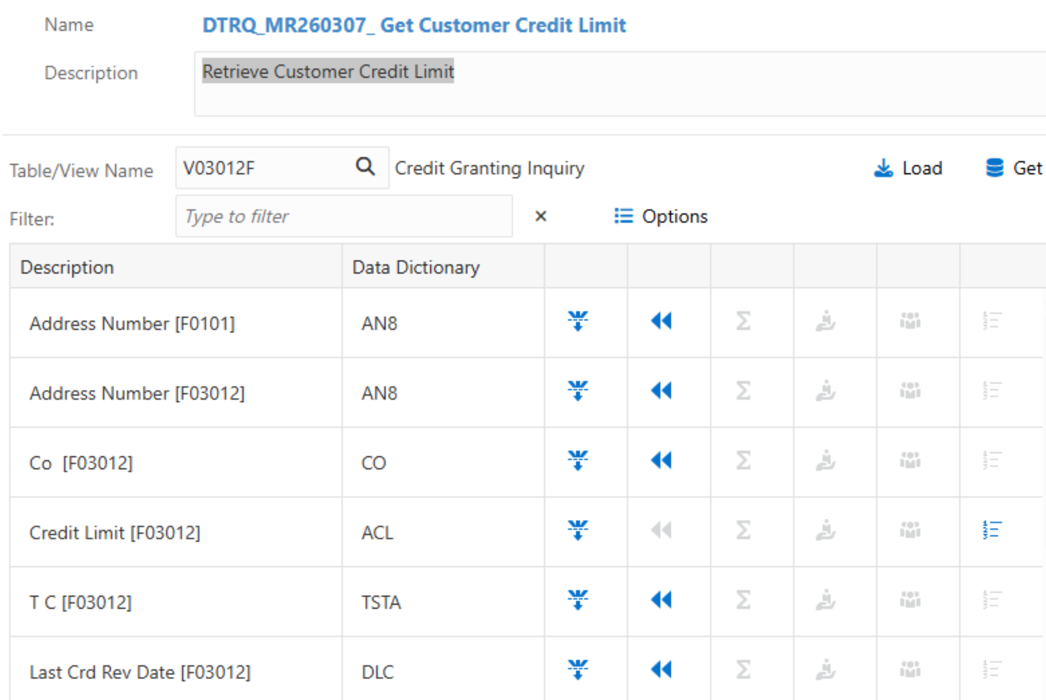

Filter Criteria
Incl
Match Type
Match All
Match Any
Description
Operator
Values
Address Number
=
${CUSTOMER}
Order Date
<=
Today
Aggregations
Include Count
F4201_count
Description
Variable
Order Amount: Sum
TOTAL ORDER AMOUNT
Having
Description
Operator
Values

Retrieve customer credit limit example

Name: DTRQ_MR260307_ Get Customer Credit Limit

Description: Retrieve Customer Credit Limit

Purpose:



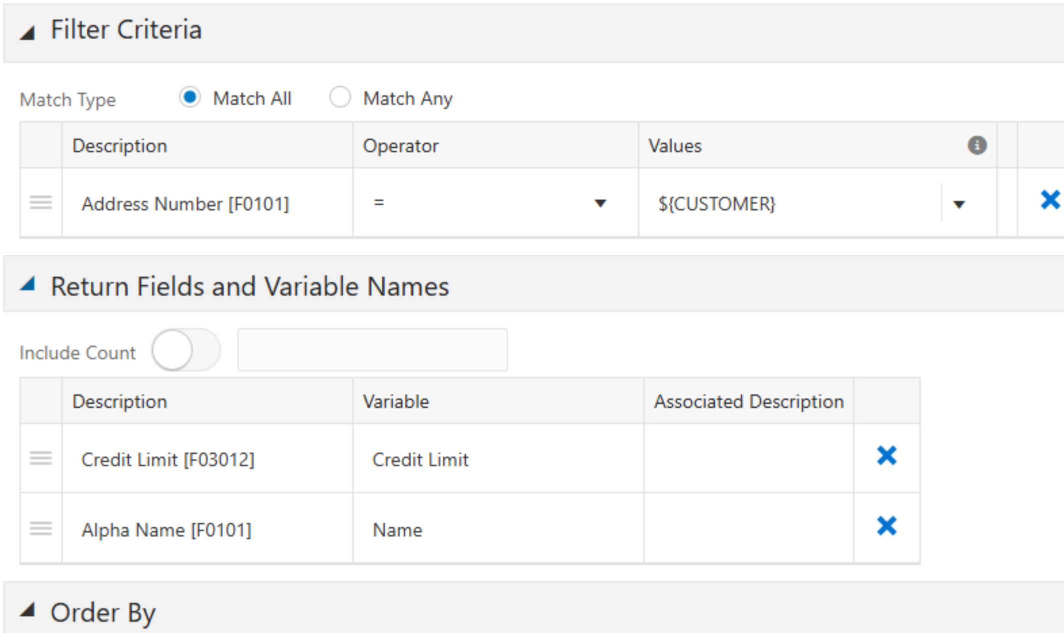
Name DTRQ_MR260307_ Get Customer Credit Limit

Description Retrieve Customer Credit Limit

Table/View Name V03012F Credit Granting Inquiry Load Get

Filter: Type to filter × Options

Description	Data Dictionary
Address Number [F0101]	AN8
Address Number [F03012]	AN8
Co [F03012]	CO
Credit Limit [F03012]	ACL
T C [F03012]	TSTA
Last Crd Rev Date [F03012]	DLC

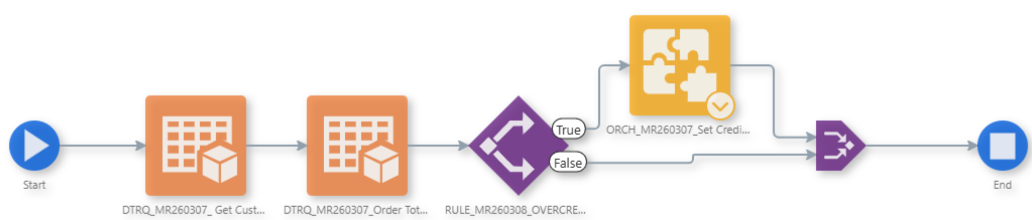

Filter Criteria
Match Type
Match All
Match Any
Description
Operator
Values
Address Number [F0101]
=
${CUSTOMER}
Return Fields and Variable Names
Include Count
Description
Variable
Associated Description
Credit Limit [F03012]
Credit Limit
Alpha Name [F0101]
Name
Order By

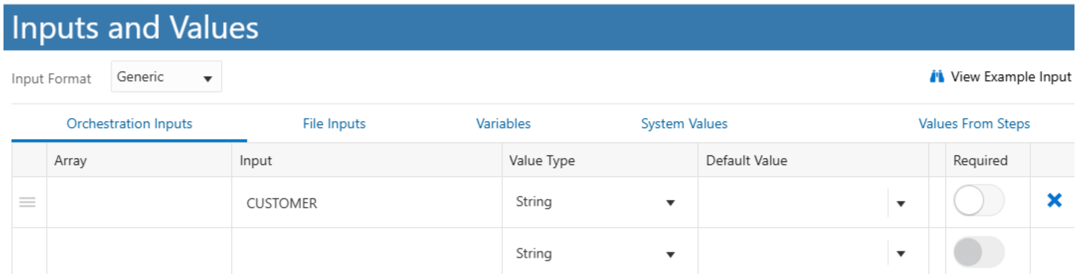
Credit check complete orchestrator flow example

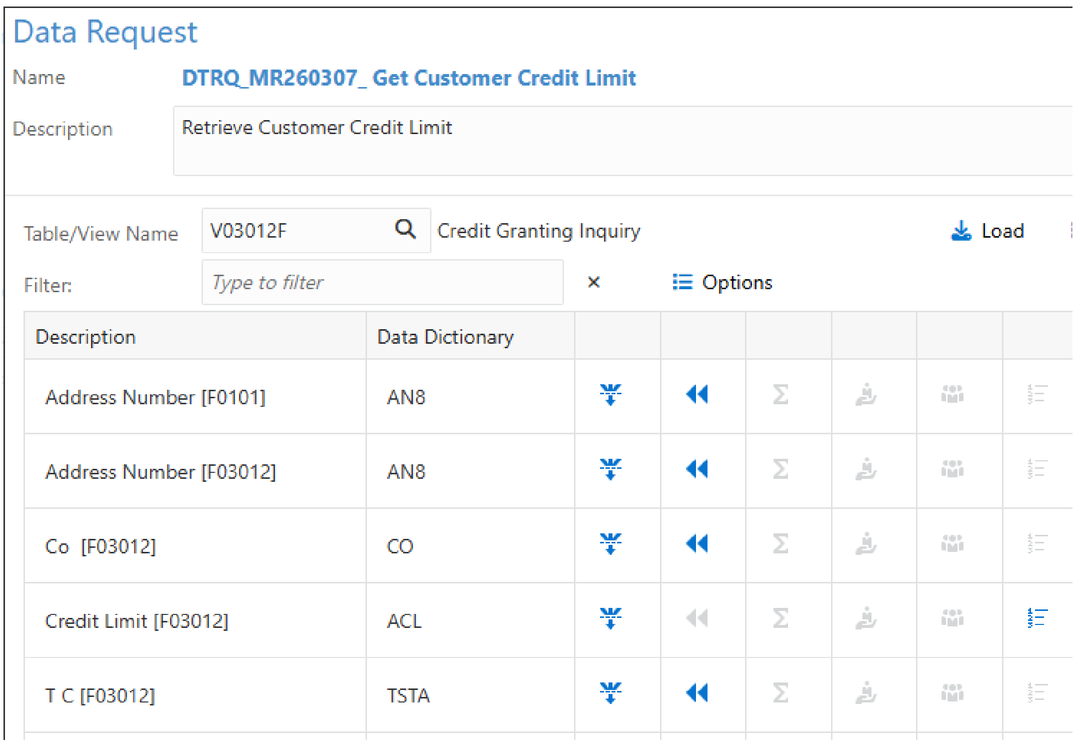
Name: ORCH_MR260308_CUSTCREDITCHECK

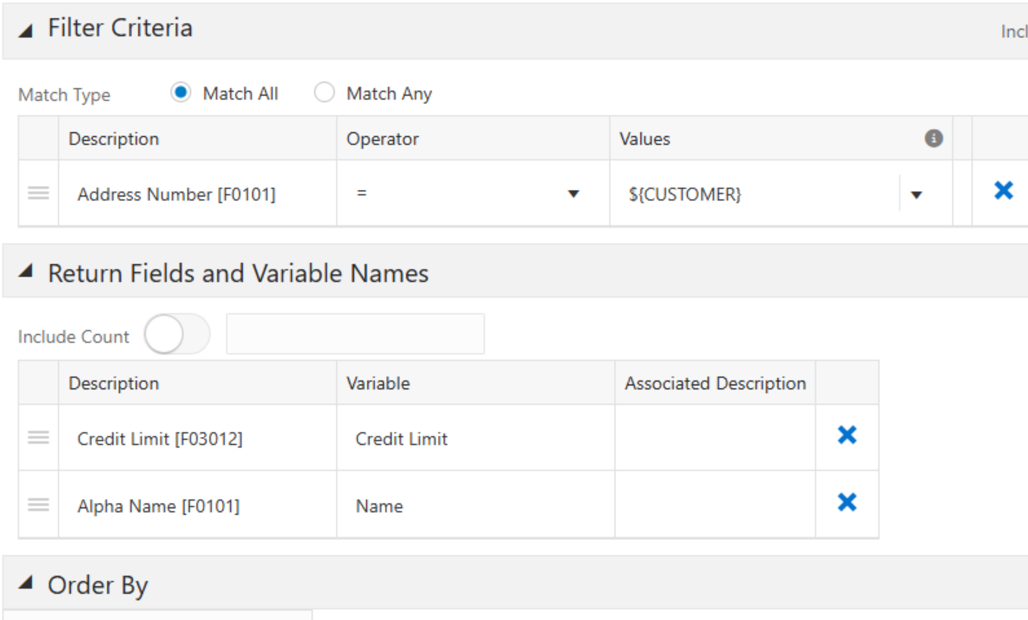
Description: CREDIT CHECK

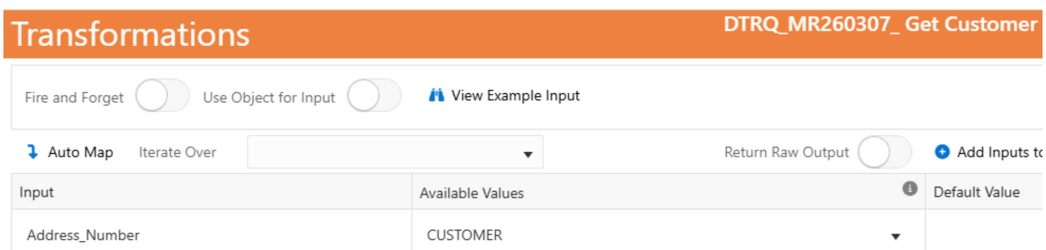
Purpose:

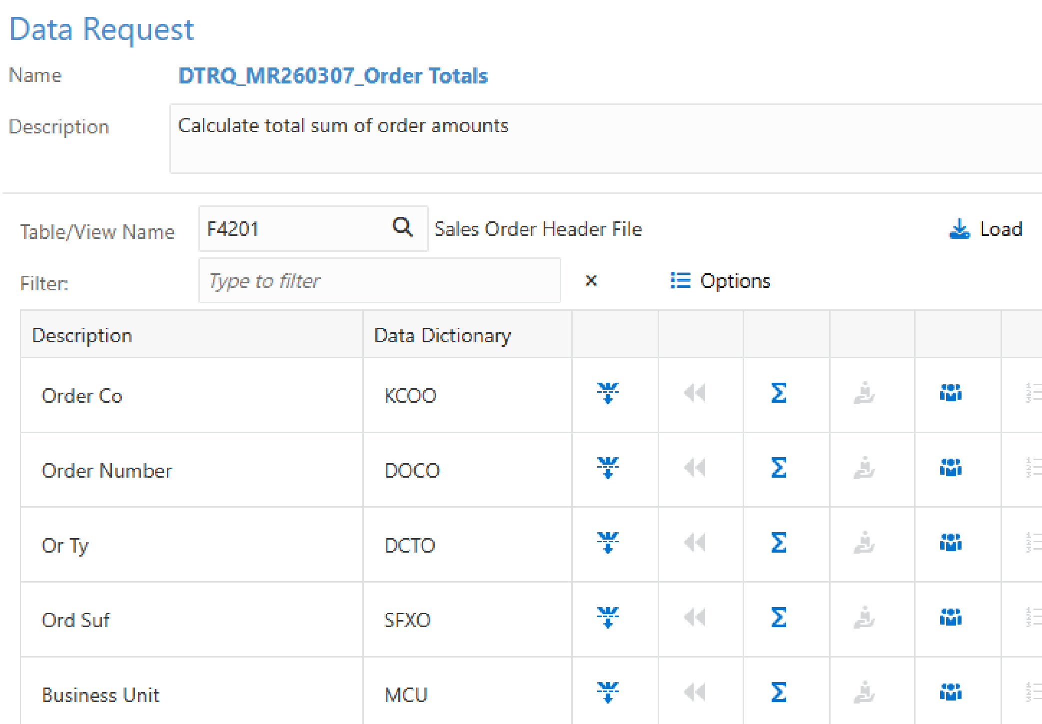


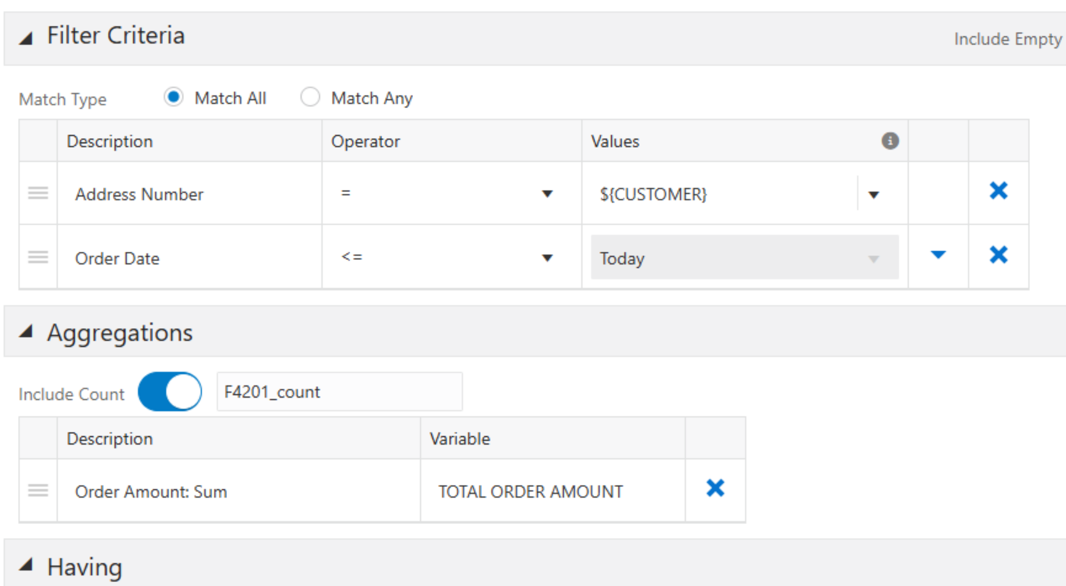

Inputs and Values
Input Format
Generic
View Example Input
Orchestration Inputs
File Inputs
Variables
System Values
Values From Steps
Array
Input
Value Type
Default Value
Required
CUSTOMER
String
String


Data Request
Name
DTRQ_MR260307_ Get Customer Credit Limit
Description
Retrieve Customer Credit Limit
Table/View Name
V03012F
Credit Granting Inquiry
Load
Filter:
Type to filter
Options
Description
Data Dictionary
Address Number [F0101]
AN8
Address Number [F03012]
AN8
Co [F03012]
CO
Credit Limit [F03012]
ACL
T C [F03012]
TSTA


Filter Criteria
Incl
Match Type
Match All
Match Any
Description
Operator
Values
Address Number [F0101]
=
${CUSTOMER}
Return Fields and Variable Names
Include Count
Description
Variable
Associated Description
Credit Limit [F03012]
Credit Limit
Alpha Name [F0101]
Name
Order By


Transformations
DTRQ_MR260307_ Get Customer
Fire and Forget
Use Object for Input
View Example Input
Auto Map
Iterate Over
Return Raw Output
Add Inputs to
Input
Available Values
Default Value
Address_Number
CUSTOMER


Data Request
Name
DTRQ_MR260307_Order Totals
Description
Calculate total sum of order amounts
Table/View Name
F4201
Sales Order Header File
Load
Filter:
Type to filter
Options
Description
Data Dictionary
Order Co
KCOO
Order Number
DOCO
Or Ty
DCTO
Ord Suf
SFXO
Business Unit
MCU


Filter Criteria
Include Empty
Match Type
Match All
Match Any
Description
Operator
Values
Address Number
=
${CUSTOMER}
Order Date
<=
Today
Aggregations
Include Count
F4201_count
Description
Variable
Order Amount: Sum
TOTAL ORDER AMOUNT
Having

Transformations

DTRQ_MR260307_Order
Data

Auto Map | Iterate Over | Return Raw Output | Add Inputs to Orches

Input	Available Values	Default Value
CUSTOMER	CUSTOMER	

Rule

Name: RULE_MR260308_OVERCREDITLIMIT

Description: CONDITION

Match Type: Match All

Rule Type	Value 1	Operator	Literal	Value 2
Numeric	OpenOrderAmt	>		CreditLimit
		=		

Transformations

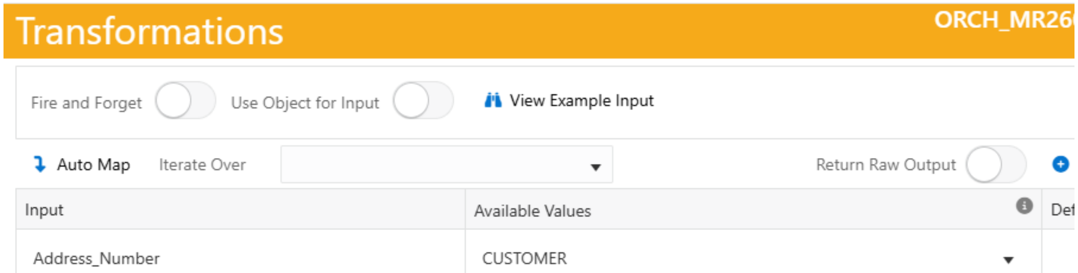
RULE_MR260308

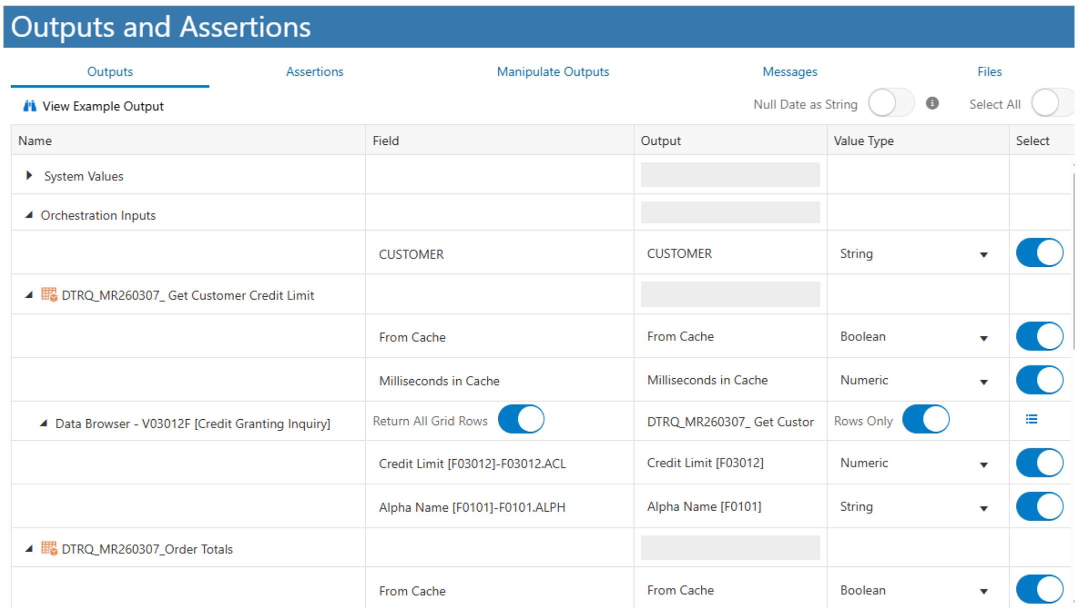
Auto Map | Iterate Over

Input	Available Values	Defau
OpenOrderAmt	TOTAL ORDER AMOUNT	
CreditLimit	Credit Limit	

Name: ORCH_MR260307_Set Credit Hold

Description: Set credit hold when customer exceeds credit limit


Transformations
ORCH_MR26
Fire and Forget
Use Object for Input
View Example Input
Auto Map
Iterate Over
Return Raw Output
Input
Available Values
Def
Address_Number
CUSTOMER

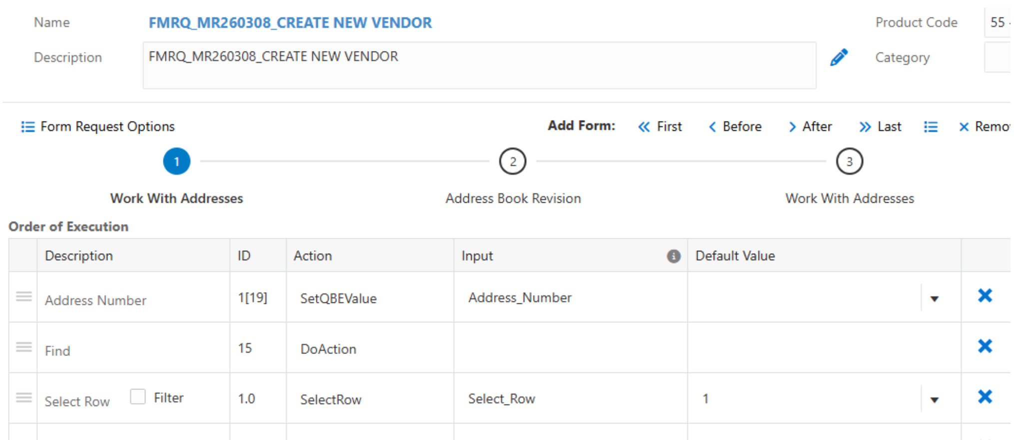

Outputs and Assertions
Outputs
Assertions
Manipulate Outputs
Messages
Files
View Example Output
Null Date as String
Select All
Name
Field
Output
Value Type
Select
System Values
Orchestration Inputs
CUSTOMER
CUSTOMER
String
DTRQ_MR260307_ Get Customer Credit Limit
From Cache
From Cache
Boolean
Milliseconds in Cache
Milliseconds in Cache
Numeric
Data Browser - V03012F [Credit Granting Inquiry]
Return All Grid Rows
DTRQ_MR260307_ Get Custor
Rows Only
Credit Limit [F03012]-F03012.ACL
Credit Limit [F03012]
Numeric
Alpha Name [F0101]-F0101.ALPH
Alpha Name [F0101]
String
DTRQ_MR260307_Order Totals
From Cache
From Cache
Boolean

Form Request Example

Name: FMRQ_MR260308_CREATE NEW VENDOR

Description: FMRQ_MR260308_CREATE NEW VENDOR

Purpose:



Available Actions

Description	ID	Return	Variable
▸ Button and Exits			
Alpha Name	58		
Display Address	63		
Display Phone	62		
Search Type	54		
▸ Work With Addresses - QBE			
▸ Work With Addresses - Grid	1		

Name: MSRQ_MR260308_CREATE NEW VENDOR

Description: MSRQ_MR260308_CREATE NEW VENDOR

To: Address Book — Address Book: ${VENDOR}

Cc: Email Address — Email Address: 61516

Bcc: *Select Type*

Preview

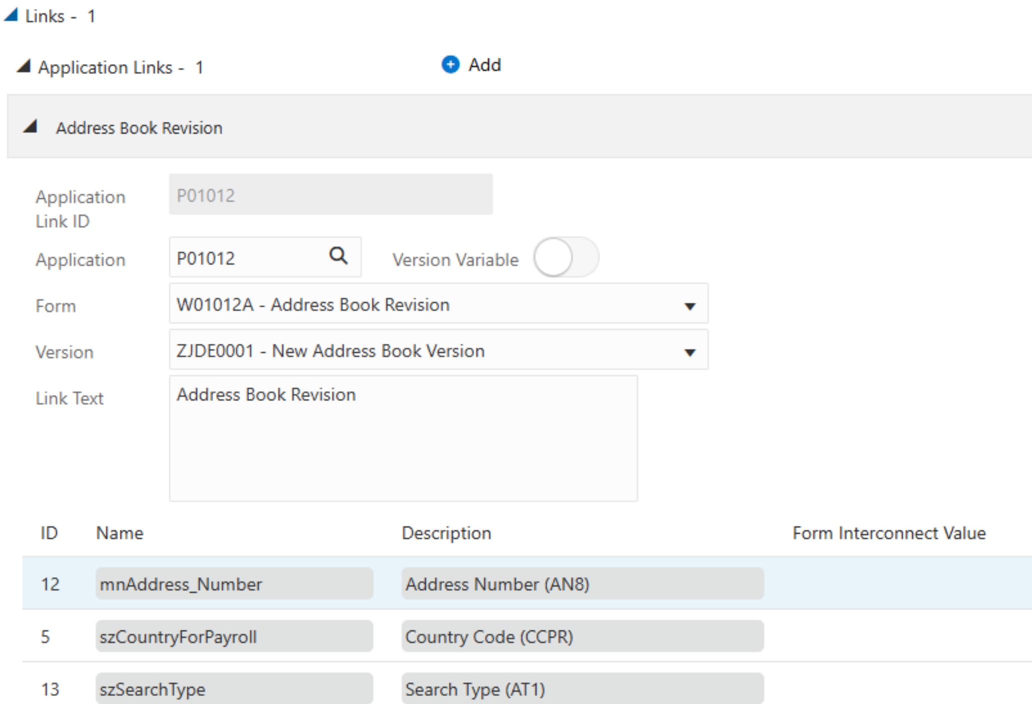
Subject: MSRQ_MR260308_CREATE NEW VENDOR

Plain Text

Placeholder | Paragraph | B I U S X₂ X²

MSRQ_MR260308_CREATE NEW VENDOR

{P01012.Link}


Links - 1

Application Links - 1 Add

Address Book Revision

Application Link ID: P01012

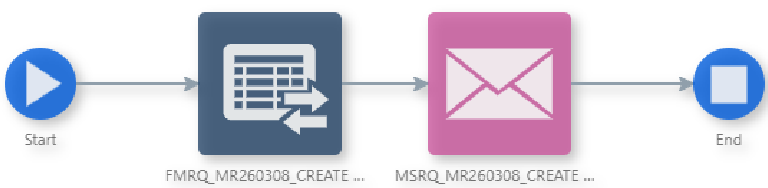
Application: P01012 Version Variable

Form: W01012A - Address Book Revision

Version: ZJDE0001 - New Address Book Version

Link Text: Address Book Revision

ID	Name	Description	Form Interconnect Value
12	mnAddress_Number	Address Number (AN8)	
5	szCountryForPayroll	Country Code (CCPR)	
13	szSearchType	Search Type (AT1)	

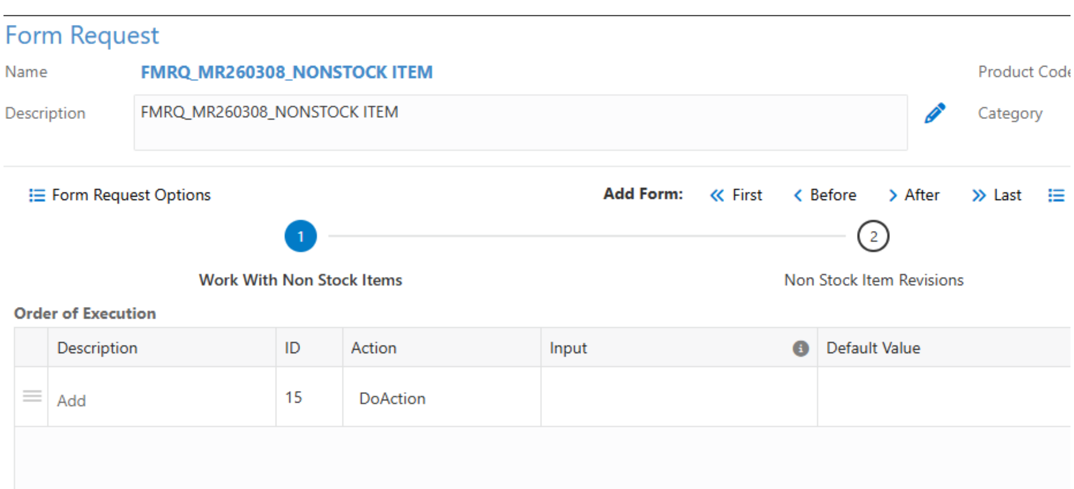


Non stock item creation example

Name: ORCH_MR260308_NONSTOCK ITEM CREATION

Description: ORCH_MR260308_NONSTOCK ITEM CREATION

Purpose:



Form Request

Name: FMRQ_MR260308_NONSTOCK ITEM

Description: FMRQ_MR260308_NONSTOCK ITEM

Product Code

Category

Form Request Options

Add Form: First Before After Last

1 Work With Non Stock Items

2 Non Stock Item Revisions

Order of Execution

Description	ID	Action	Input	Default Value
Add	15	DoAction		

Form Request Options

Add Form: « First ‹ Before › After » Last × Remove

1 Work With Non Stock Items — 2 **Non Stock Item Revisions**

Order of Execution

Description	ID	Action	Input	Default Value
Product Number	42	SetControlValue	Product_No	MR260308NONSTOCK
Description	46	SetControlValue	Description	
G/L Class	56	SetControlValue	G_L_Class	AD20
Line Type	54	SetControlValue	Line_Type	
Commodity Class	66	SetControlValue	Commodity_Class	

Transformations

FMRQ_MR260308_NONSTO

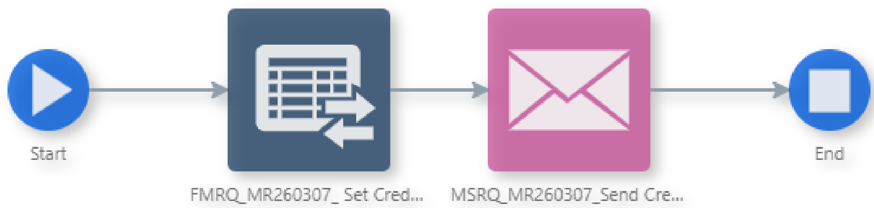
Auto Map   Iterate Over   Return Raw Output   Add Inputs to Or

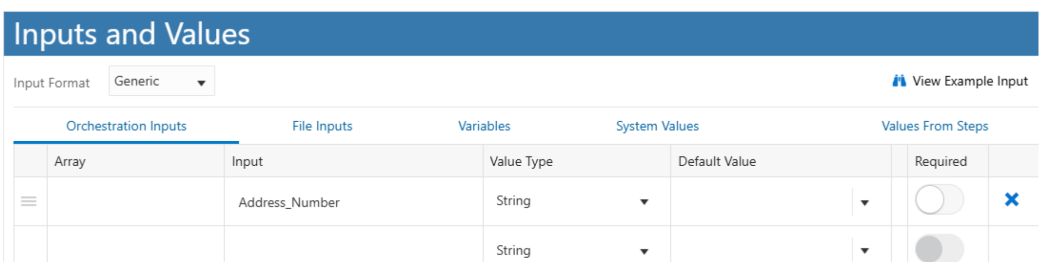
Input	Available Values	Default Value
Product_No		
Description		
G_L_Class		
Line_Type		
Commodity_Class		
P4101N_Version		

Name: ORCH_MR260307_Set Credit Hold

Description: Set credit hold when customer exceeds credit limit

Purpose:



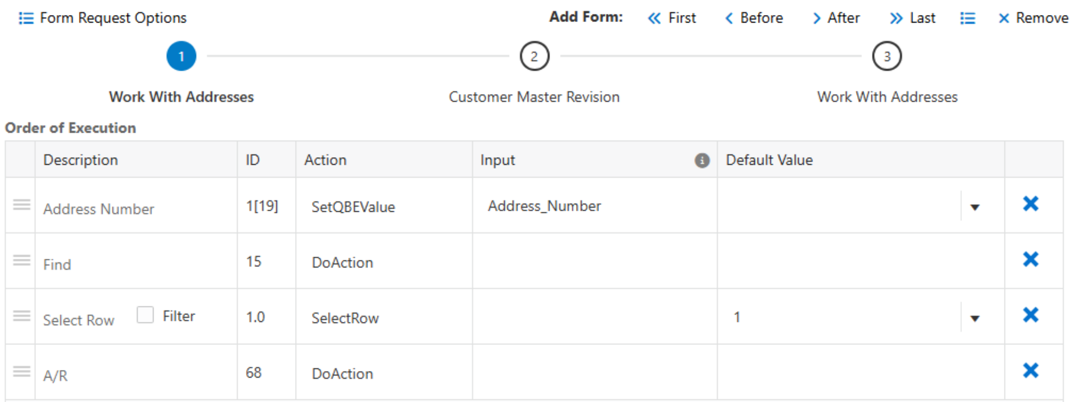

Inputs and Values

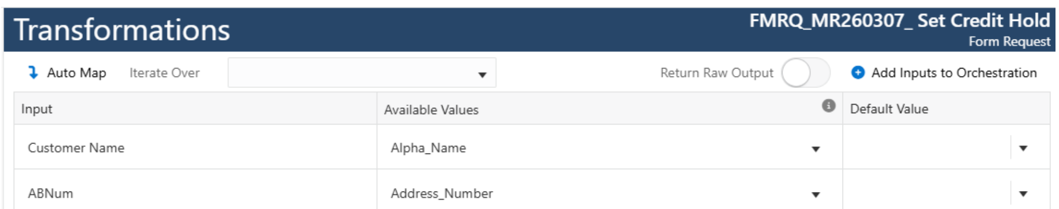
Input Format Generic

View Example Input

Orchestration Inputs | File Inputs | Variables | System Values | Values From Steps

	Array	Input	Value Type	Default Value	Required	
		Address_Number	String			
			String			


Form Request Options
Add Form: First Before After Last Remove
1 Work With Addresses
2 Customer Master Revision
3 Work With Addresses
Order of Execution
Description | ID | Action | Input | Default Value
Address Number | 1[19] | SetQBEValue | Address_Number |
Find | 15 | DoAction | |
Select Row Filter | 1.0 | SelectRow | | 1
A/R | 68 | DoAction | |


Transformations
FMRQ_MR260307_ Set Credit Hold
Form Request
Auto Map Iterate Over
Return Raw Output
Add Inputs to Orchestration
Input | Available Values | Default Value
Customer Name | Alpha_Name |
ABNum | Address_Number |

Available Actions

Description	ID	Return	Variable
▸ Button and Exits			
Alpha Name	58		
Display Address	63		
Display Phone	62		
Search Type	54		
▸ Work With Addresses - QBE			
▸ Work With Addresses - Grid	1		

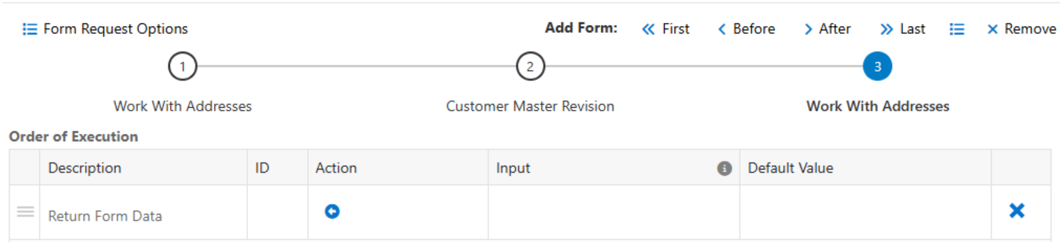
Form Request Options

Add Form: First Before After Last Remove

1 Work With Addresses — 2 **Customer Master Revision** — 3 Work With Addresses

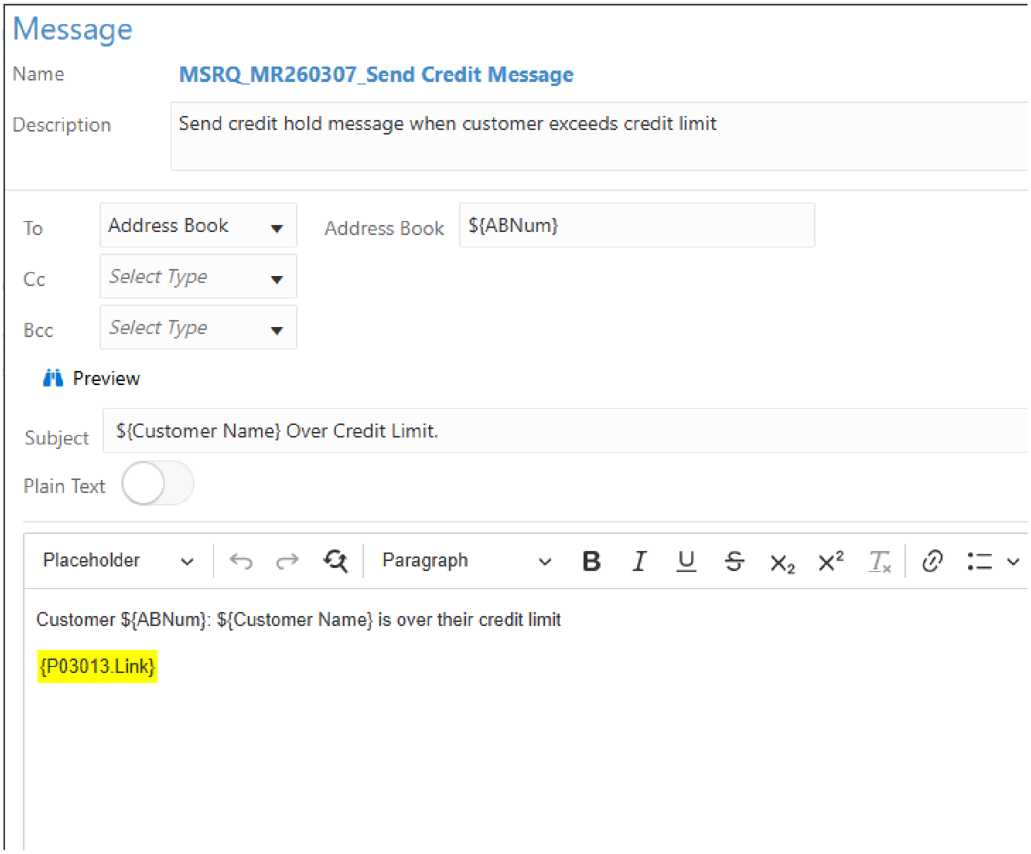
Order of Execution

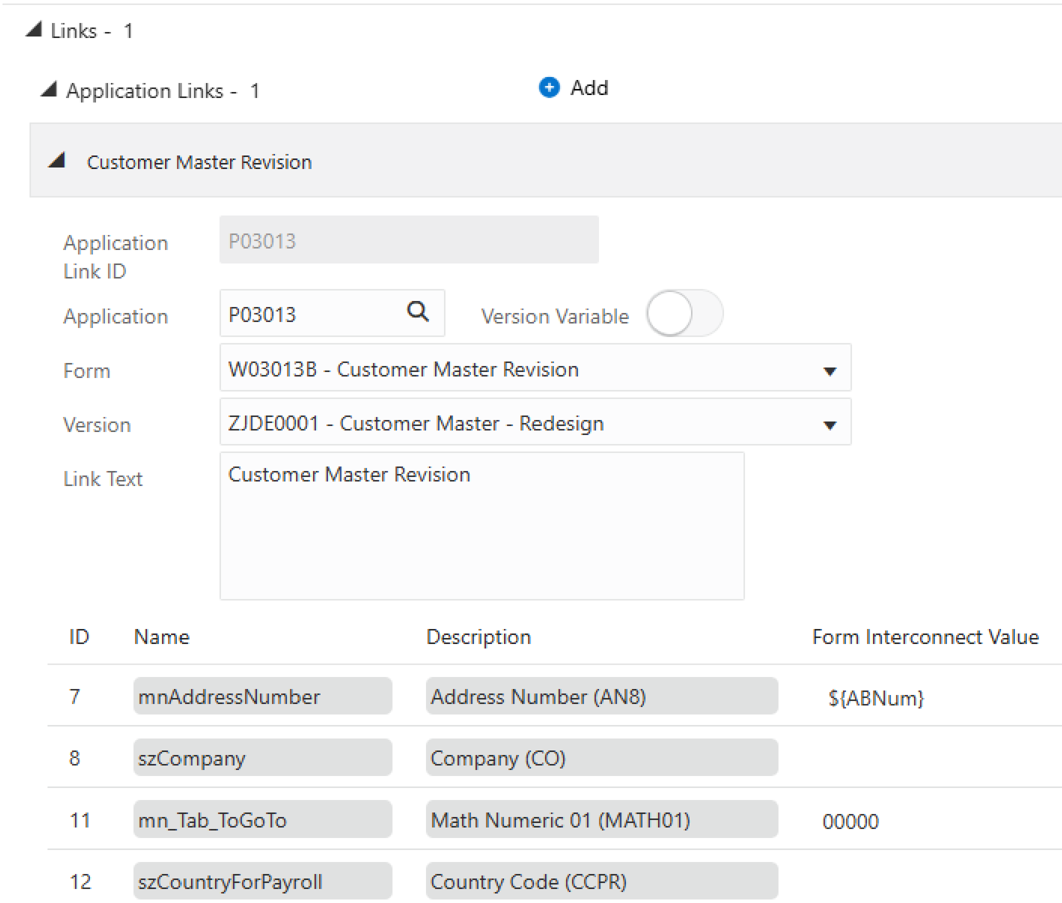
Description	ID	Action	Input	Default Value	
Credit	23.25	TabClick			✖
Credit Message	77	SetControlValue		7	✖
OK	11	DoAction			✖

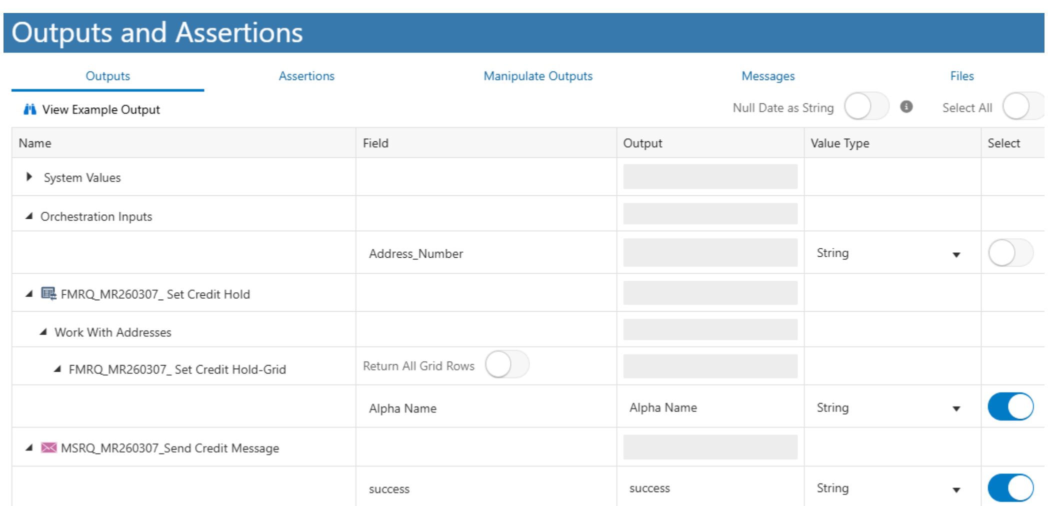

Form Request Options
Add Form:
First
Before
After
Last
Remove
1
2
3
Work With Addresses
Customer Master Revision
Work With Addresses
Order of Execution
Description
ID
Action
Input
Default Value
Return Form Data

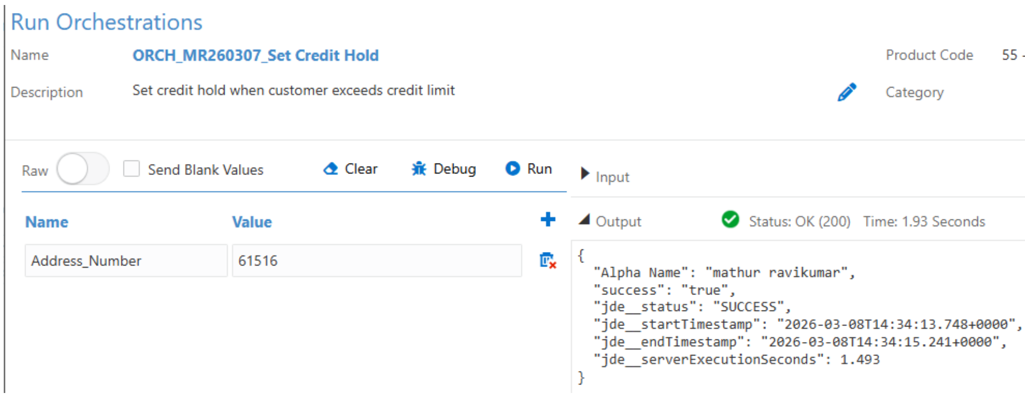
Available Actions

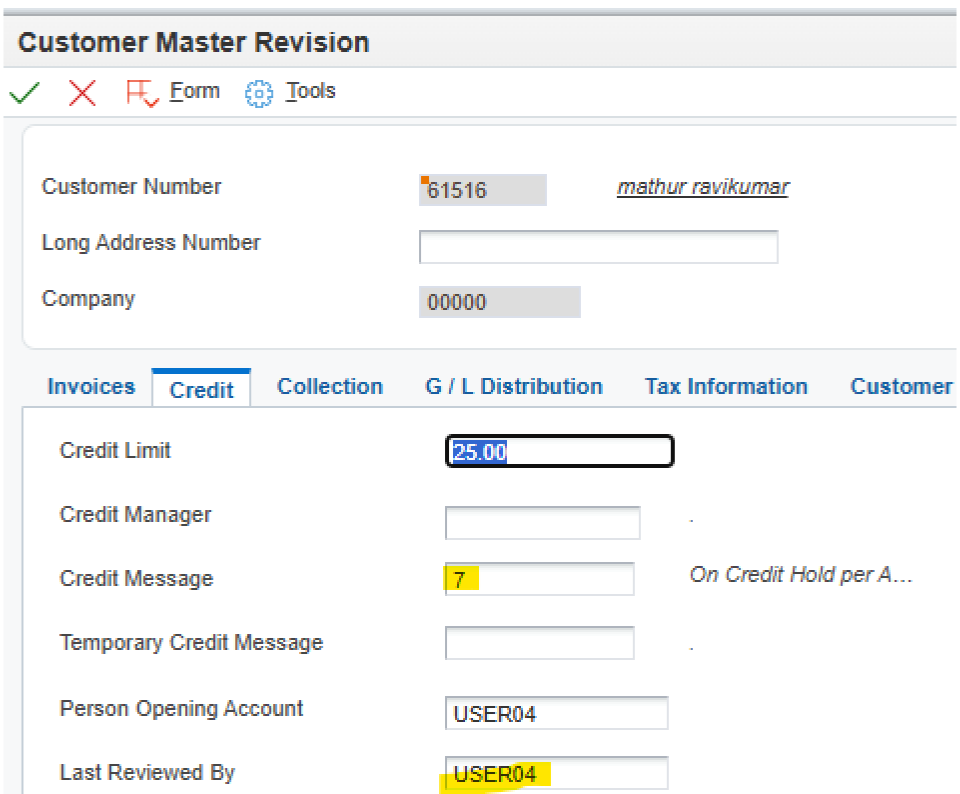
Description	ID	Return	Variable	
▸ Button and Exits				
Alpha Name	58			+
Display Address	63			+
Display Phone	62			+
Search Type	54			+
▸ Work With Addresses - QBE				
Work With Addresses - Grid	1		GridOut_1_3	
Include Count				
Select All Rows				+
Select Row				+
Address Line 1	40			
Address Number	19			
Alpha Name	20		Alpha_Name	

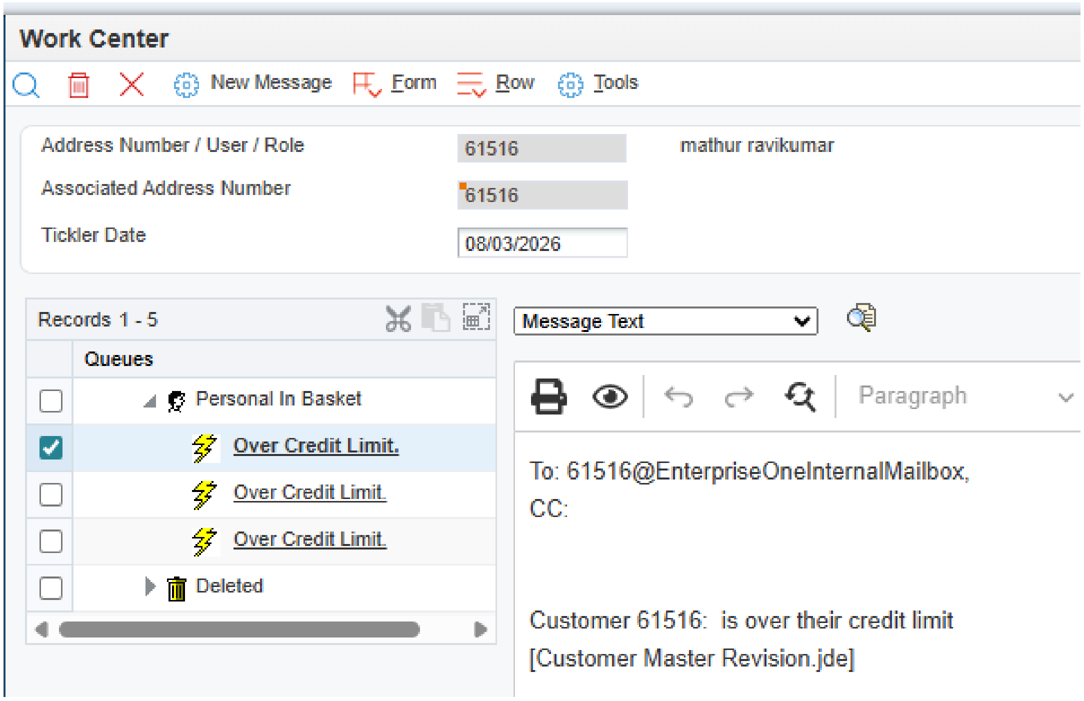

Message
Name
MSRQ_MR260307_Send Credit Message
Description
Send credit hold message when customer exceeds credit limit
To
Address Book
Address Book
${ABNum}
Cc
Select Type
Bcc
Select Type
Preview
Subject
${Customer Name} Over Credit Limit.
Plain Text
Placeholder
Paragraph
Customer ${ABNum}: ${Customer Name} is over their credit limit
{P03013.Link}

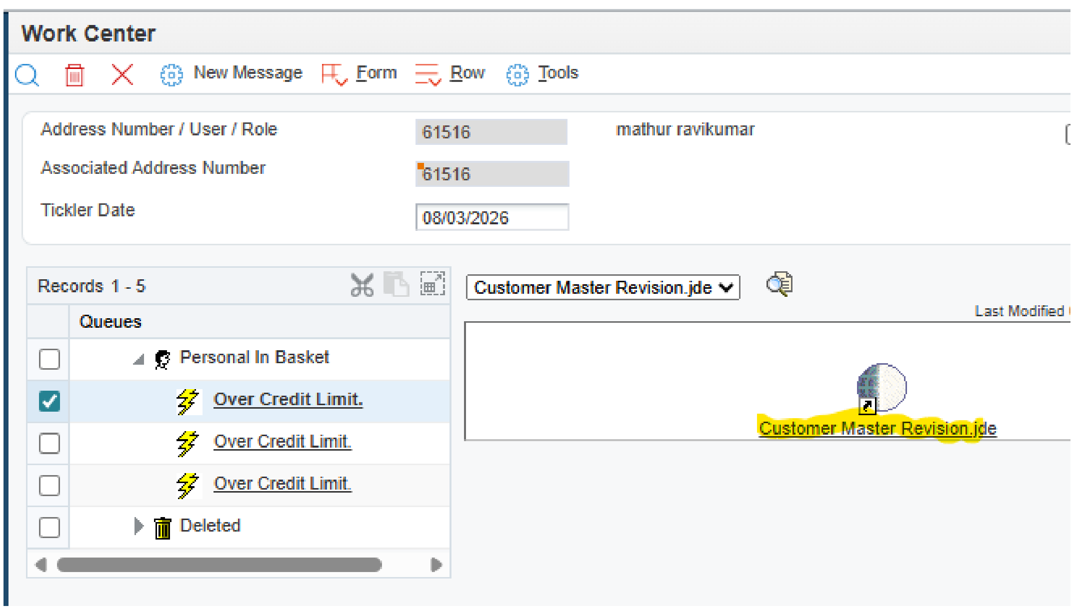

Links - 1
Application Links - 1
Add
Customer Master Revision
Application Link ID
P03013
Application
P03013
Version Variable
Form
W03013B - Customer Master Revision
Version
ZJDE0001 - Customer Master - Redesign
Link Text
Customer Master Revision
ID
Name
Description
Form Interconnect Value
7
mnAddressNumber
Address Number (AN8)
${ABNum}
8
szCompany
Company (CO)
11
mn_Tab_ToGoTo
Math Numeric 01 (MATH01)
00000
12
szCountryForPayroll
Country Code (CCPR)

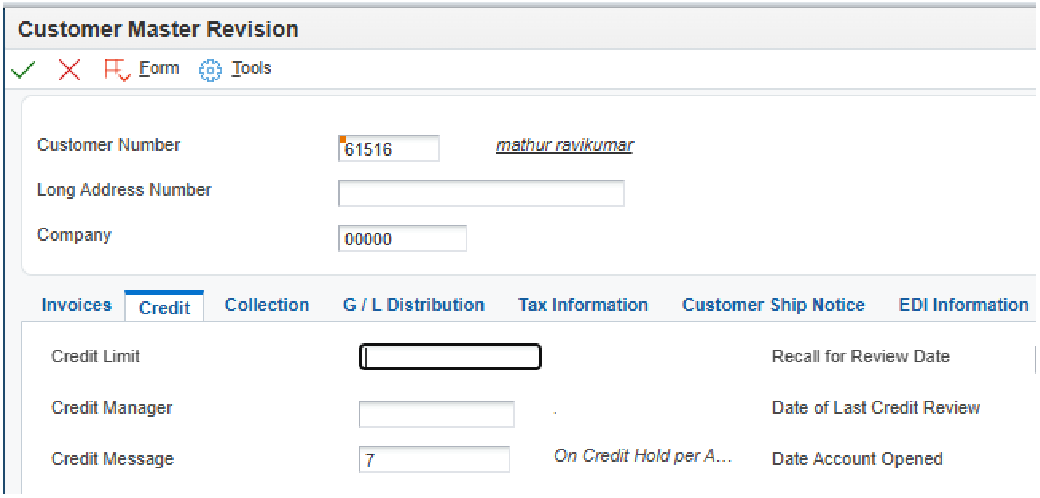

Outputs and Assertions
Outputs
Assertions
Manipulate Outputs
Messages
Files
View Example Output
Null Date as String
Select All
Name
Field
Output
Value Type
Select
System Values
Orchestration Inputs
Address_Number
String
FMRQ_MR260307_ Set Credit Hold
Work With Addresses
FMRQ_MR260307_ Set Credit Hold-Grid
Return All Grid Rows
Alpha Name
Alpha Name
String
MSRQ_MR260307_Send Credit Message
success
success
String


Run Orchestrations
Name
ORCH_MR260307_Set Credit Hold
Product Code
55 -
Description
Set credit hold when customer exceeds credit limit
Category
Raw
Send Blank Values
Clear
Debug
Run
Input
Name
Value
Output
Status: OK (200)
Time: 1.93 Seconds
Address_Number
61516
{
"Alpha Name": "mathur ravikumar",
"success": "true",
"jde__status": "SUCCESS",
"jde__startTimestamp": "2026-03-08T14:34:13.748+0000",
"jde__endTimestamp": "2026-03-08T14:34:15.241+0000",
"jde__serverExecutionSeconds": 1.493
}


Customer Master Revision
Form
Tools
Customer Number
61516
mathur ravikumar
Long Address Number
Company
00000
Invoices
Credit
Collection
G / L Distribution
Tax Information
Customer
Credit Limit
25.00
Credit Manager
Credit Message
7
On Credit Hold per A...
Temporary Credit Message
Person Opening Account
USER04
Last Reviewed By
USER04


Work Center
New Message
Form
Row
Tools
Address Number / User / Role
61516
mathur ravikumar
Associated Address Number
61516
Tickler Date
08/03/2026
Records 1 - 5
Message Text
Queues
Personal In Basket
Over Credit Limit.
Over Credit Limit.
Over Credit Limit.
Deleted
Paragraph
To: 61516@EnterpriseOneInternalMailbox,
CC:
Customer 61516: is over their credit limit
[Customer Master Revision.jde]


Work Center
New Message
Form
Row
Tools
Address Number / User / Role
61516
mathur ravikumar
Associated Address Number
61516
Tickler Date
08/03/2026
Records 1 - 5
Customer Master Revision.jde
Queues
Personal In Basket
Over Credit Limit.
Over Credit Limit.
Over Credit Limit.
Deleted
Customer Master Revision.jde

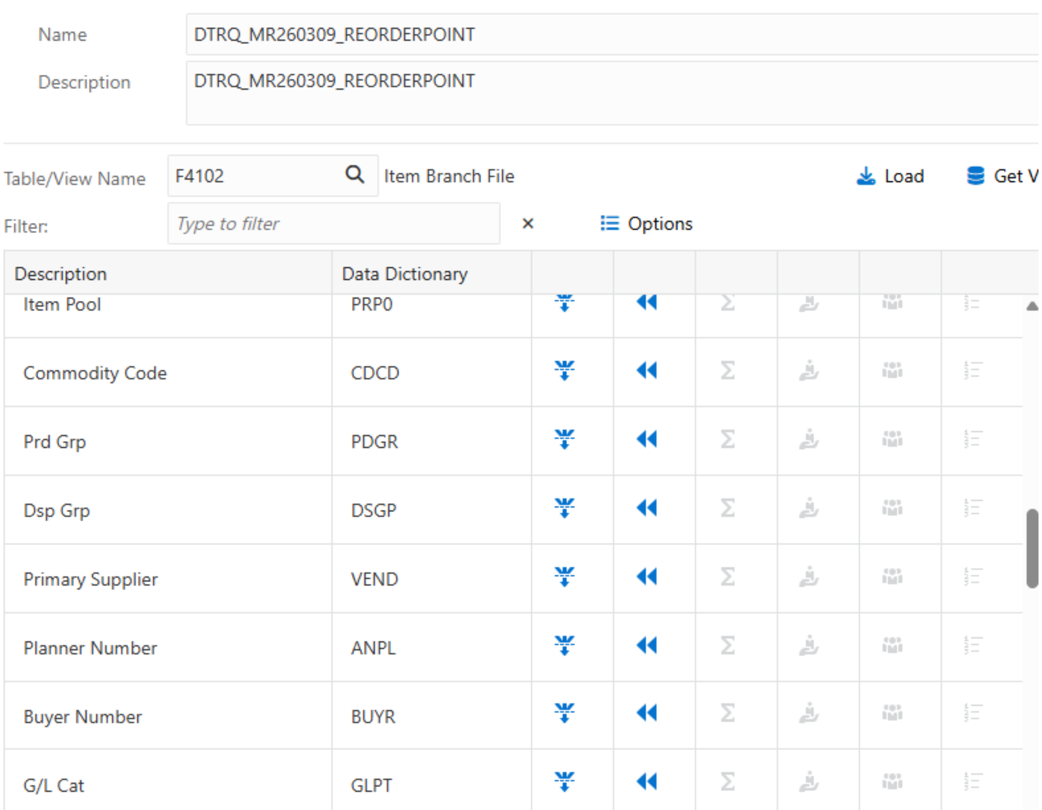

Customer Master Revision
Form
Tools
Customer Number
61516
mathur ravikumar
Long Address Number
Company
00000
Invoices
Credit
Collection
G / L Distribution
Tax Information
Customer Ship Notice
EDI Information
Credit Limit
Recall for Review Date
Credit Manager
Date of Last Credit Review
Credit Message
7
On Credit Hold per A...
Date Account Opened

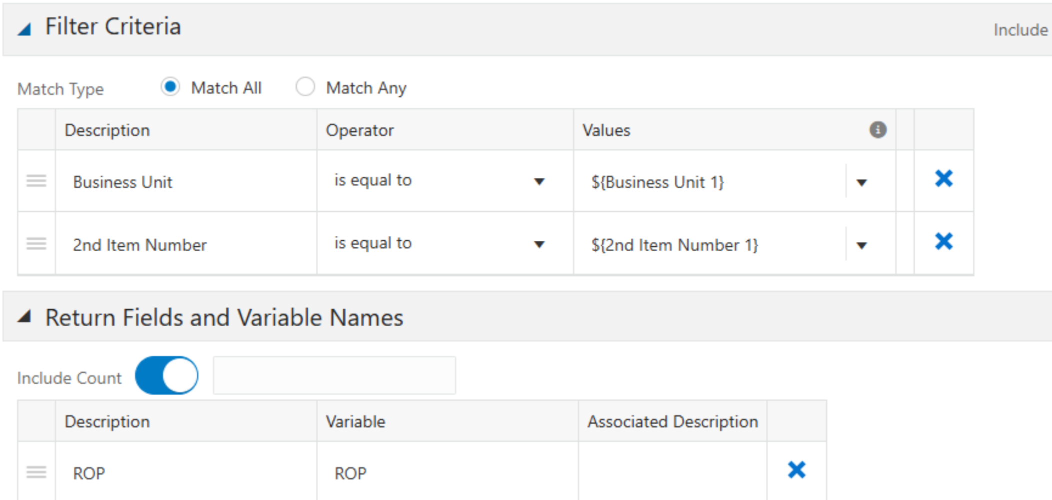
Name: ORCH_MR260308_NONSTOCK ITEM CREATION

Description: ORCH_MR260308_NONSTOCK ITEM CREATION

Purpose:

DTRQ_MR260309_REORDERPOINT





DTRQ_MR260309_ONHANDINVENTORY

Name	DTRQ_MR260309_ONHANDINVENTORY
Description	DTRQ_MR260309_ONHANDINVENTORY

Table/View Name F41021 Item Location File Load Get V

Filter: Type to filter × Options

Description	Data Dictionary
Short Item No	ITM
Business Unit	MCU
Location	LOCN
Lot Serial Number	LOTN
Primary Location	PBIN
G/L Cat	GLPT
Lot Stat Code	LOTS
Last Rcpt Date	LRCJ

Filter Criteria

Include

Match Type Match All Match Any

Description	Operator	Values
Business Unit	is equal to	${Business Unit 1}
Short Item No	=	${Short Item No 1}

Return Fields and Variable Names

Include Count

Description	Variable	Associated Description
Quantity On Hand	Quantity On Hand	

Rule

Name: RULE_MR260309_INV VS ROP

Description: RULE_MR260309_INV VS ROP

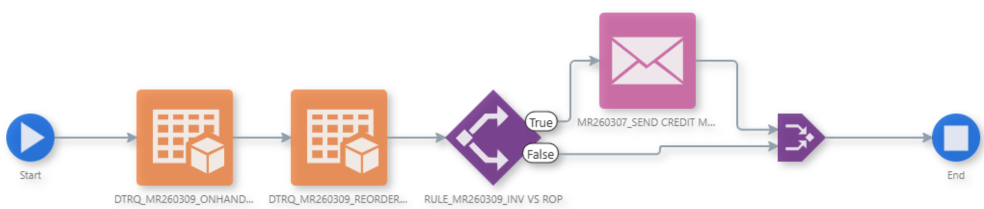
Product Code

Category

Match Type: Match All

Rule Type	Value 1	Operator	Literal	Value 2
String	${ONHAND}	<		${ROP}
		=		

ORCH_MR260309_ONHAND VS ROP ALERT



JDE UDO TOOLS, CAFE1, WATCHLISTS, EXTENSIONS

CAFE1 Purchasing Composite

Business Requirement:

CAFE1 is a powerful JDE UDO tool to build composite application talking to each other applications. Useful in quick data review as in item branch master data review to complex decision making process like whether to process MRP messages or not. Also useful in management review and S & OP (Sales and operations planning) review sessions. You can prebuild the queries and bring up the CAFE1 application in the group sessions to review data points.

In this example we are tying purchase order inquiry with Supply & demand inquiry

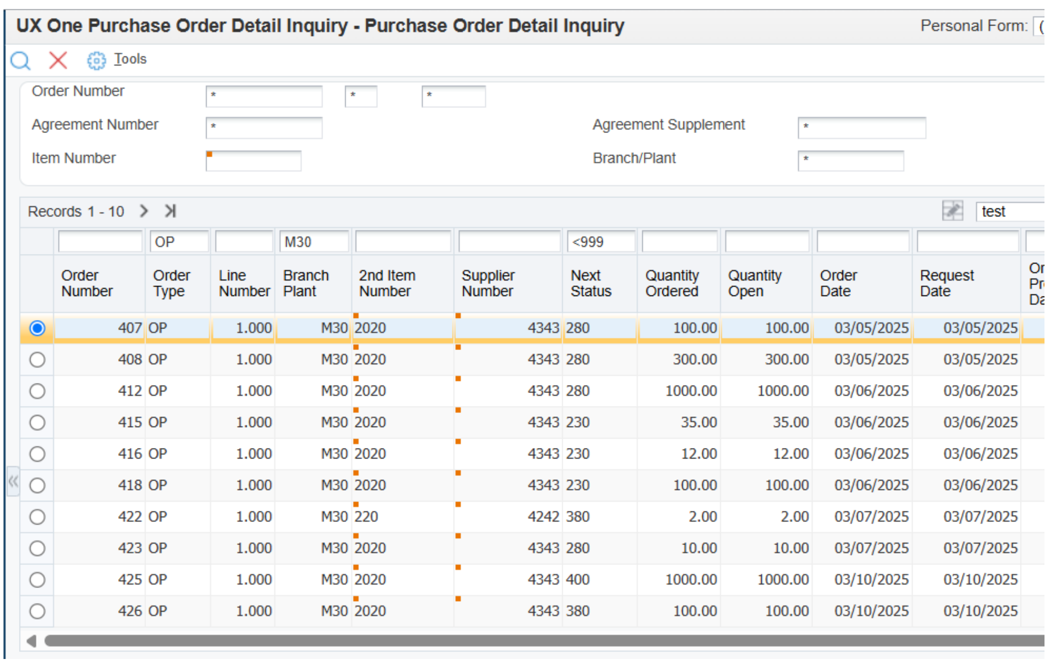
Technology used: UDO CAFE1.

Limitations: Ensure you have security access to generate the CAFE1 UDOs.

Table/Application Used: Ux One Purchase Order detail inquiry

Step 1

Open Ux One Purchase Order detail inquiry. Enter QBE values to filter get sample data. Reformat the grid and/or complete grid extension sessions.


UX One Purchase Order Detail Inquiry - Purchase Order Detail Inquiry

Personal Form:

Tools

Order Number * * *

Agreement Number *

Agreement Supplement *

Item Number

Branch/Plant *

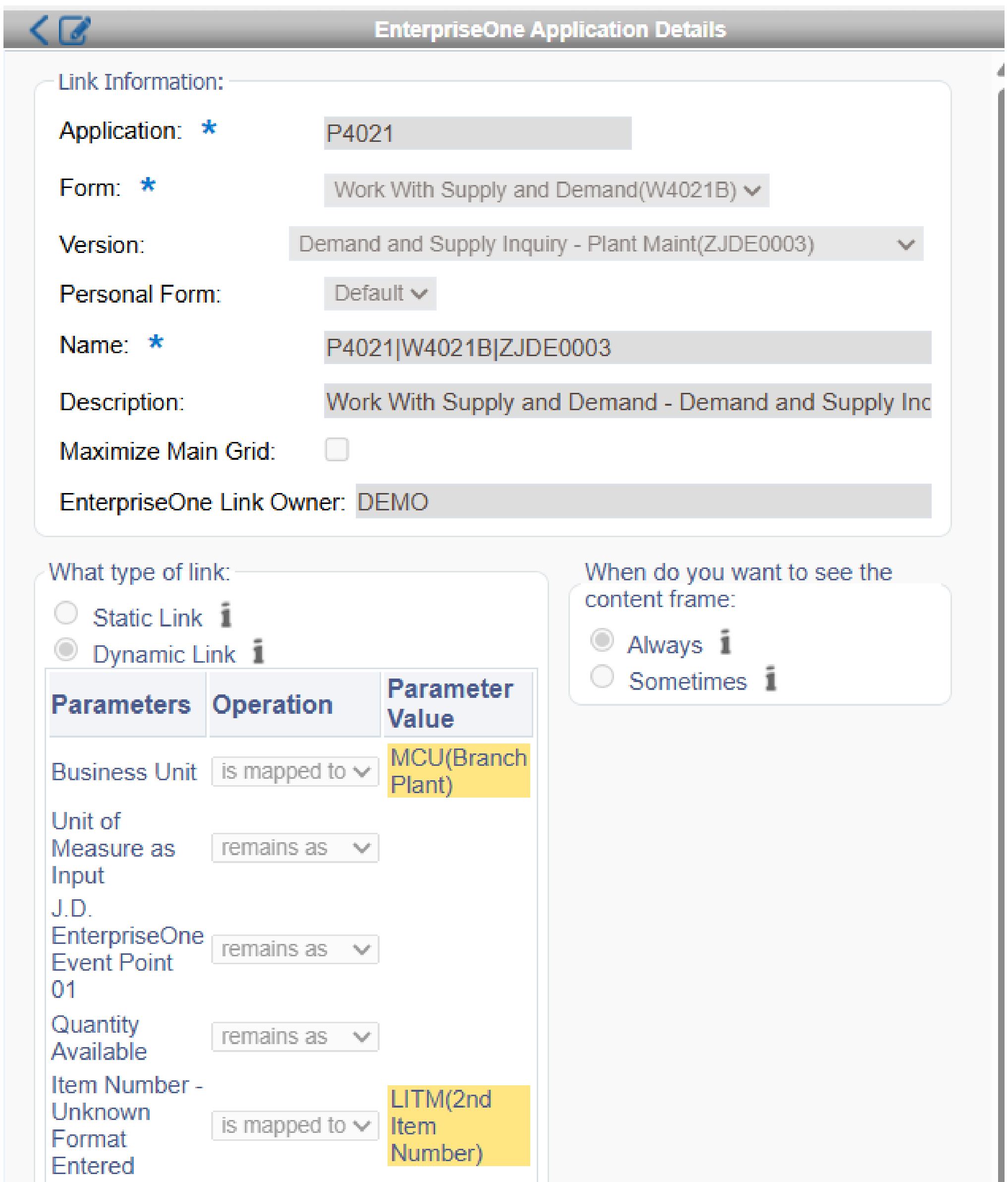
Records 1 - 10

test

Order Number	Order Type	Line Number	Branch Plant	2nd Item Number	Supplier Number	Next Status	Quantity Ordered	Quantity Open	Order Date	Request Date
	OP		M30			<999				
407	OP	1.000	M30	2020	4343	280	100.00	100.00	03/05/2025	03/05/2025
408	OP	1.000	M30	2020	4343	280	300.00	300.00	03/05/2025	03/05/2025
412	OP	1.000	M30	2020	4343	280	1000.00	1000.00	03/06/2025	03/06/2025
415	OP	1.000	M30	2020	4343	230	35.00	35.00	03/06/2025	03/06/2025
416	OP	1.000	M30	2020	4343	230	12.00	12.00	03/06/2025	03/06/2025
418	OP	1.000	M30	2020	4343	230	100.00	100.00	03/06/2025	03/06/2025
422	OP	1.000	M30	220	4242	380	2.00	2.00	03/07/2025	03/07/2025
423	OP	1.000	M30	2020	4343	280	10.00	10.00	03/07/2025	03/07/2025
425	OP	1.000	M30	2020	4343	400	1000.00	1000.00	03/10/2025	03/10/2025
426	OP	1.000	M30	2020	4343	380	100.00	100.00	03/10/2025	03/10/2025

Step 2

Start CAFE1 process of adding another application to the right pane

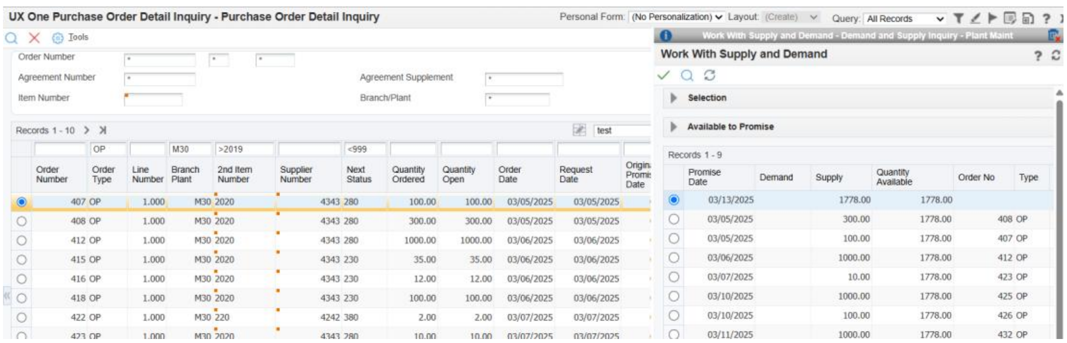


Step 3

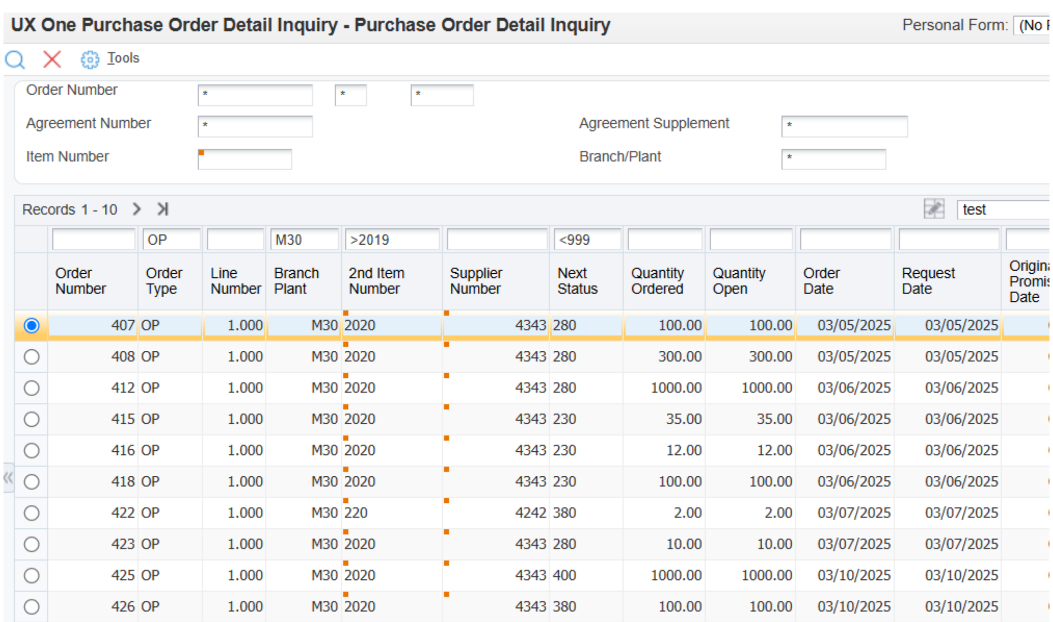
Completed view of first right pane looks like below.

Save the composite with a unique yet clearly understandable name.

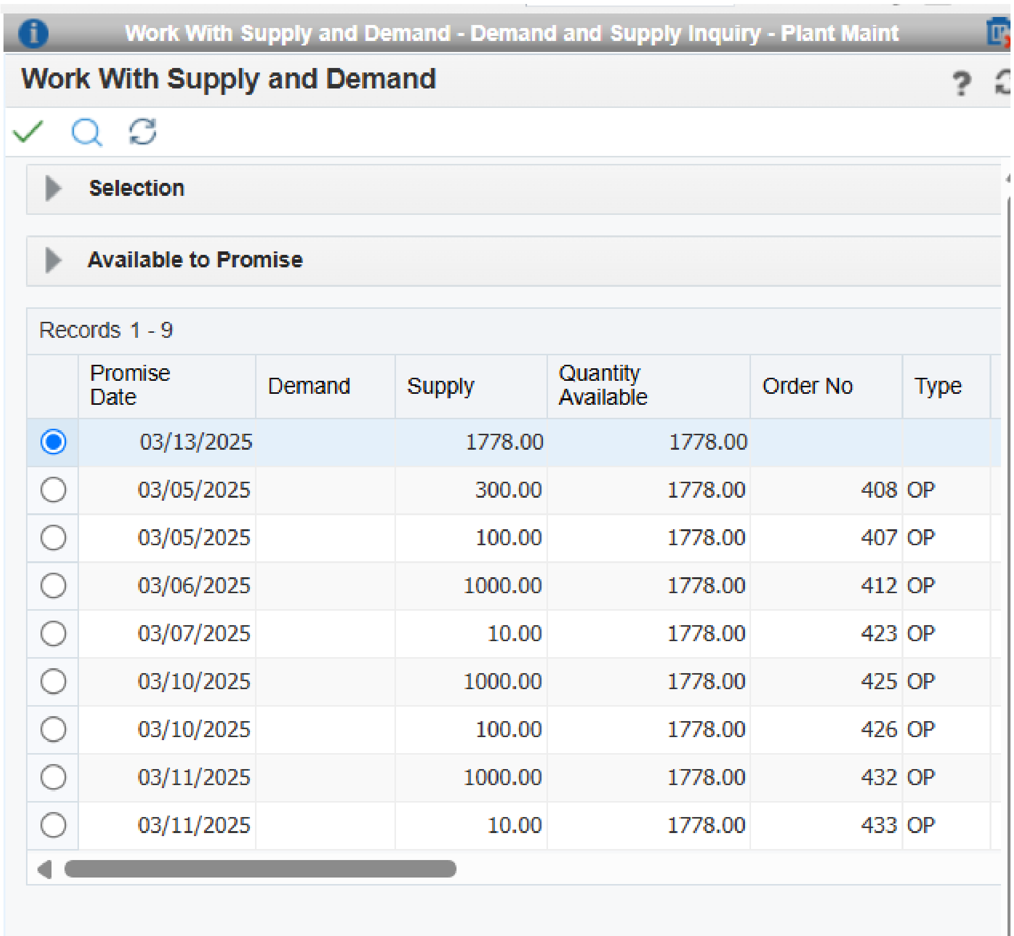
Ask IT for deployment and promotion to PD.



Split view of the left pane



Split view of the right pane



CAFE1 Workorder Composite

Business Requirement:

CAFE1 is a powerful JDE UDO tool to build composite application talking to each other applications. Useful in quick data review as in work order cost variance coming from std vs actual quantity usage. Also useful in management review and S & OP (Sales and operations planning) review sessions. You can prebuild the queries and bring up the CAFE1 application in the group sessions to review data points.

In this example we are tying work order cost variance to the work order entry so that you can quickly inquire WO parts lists consumed and WO routing consumed data.

Technology used: UDO CAFE1.

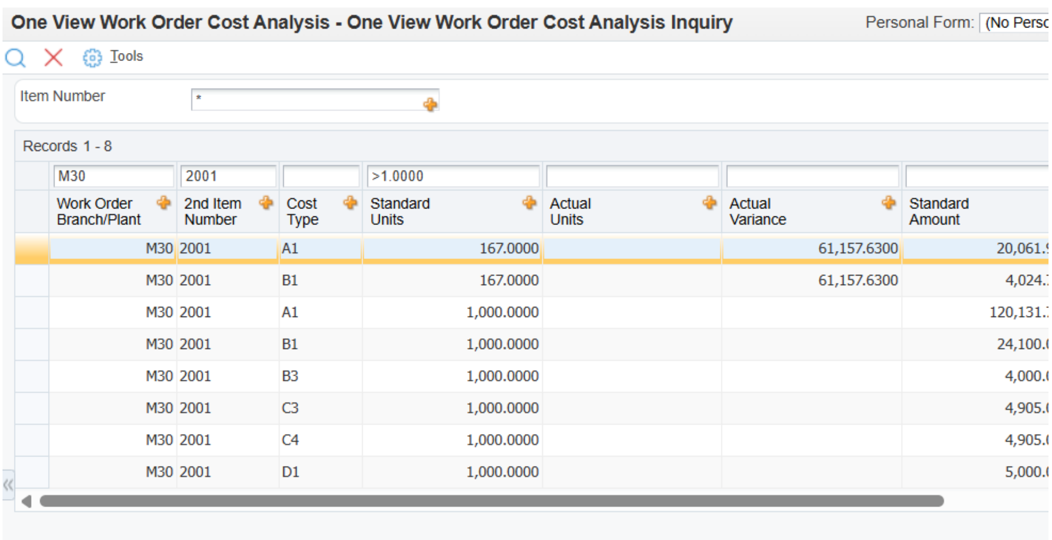
Limitations: Ensure you have security access to generate the CAFE1 UDOs.

Table/Application Used: One View Work order cost analysis inquiry

Step 1

Open One View Work order cost analysis inquiry

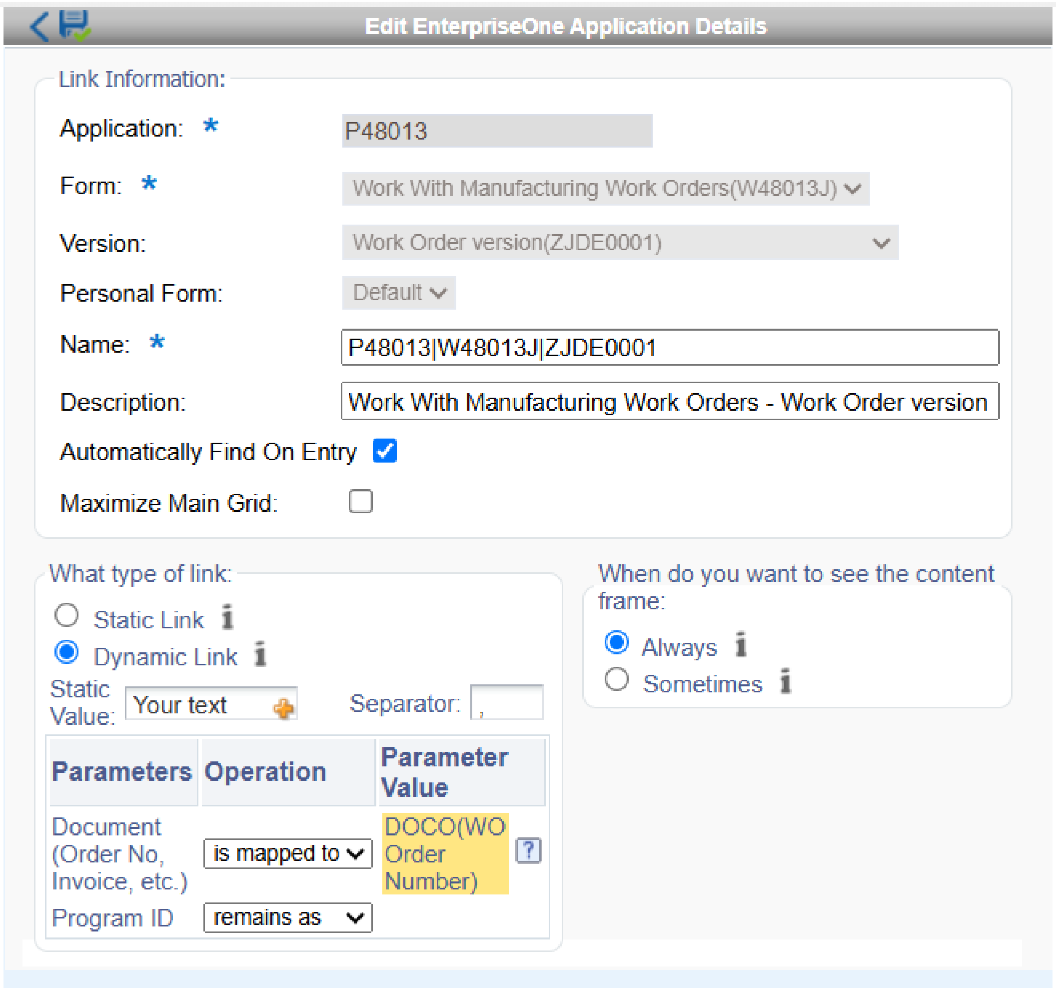
Enter QBE values to filter get sample data. Reformat the grid and/or complete grid extension sessions.



Step 2

Start CAFE1 process of adding another application to the right pane

You can also use different form names (instead of W48013J) to get different cafe1 views

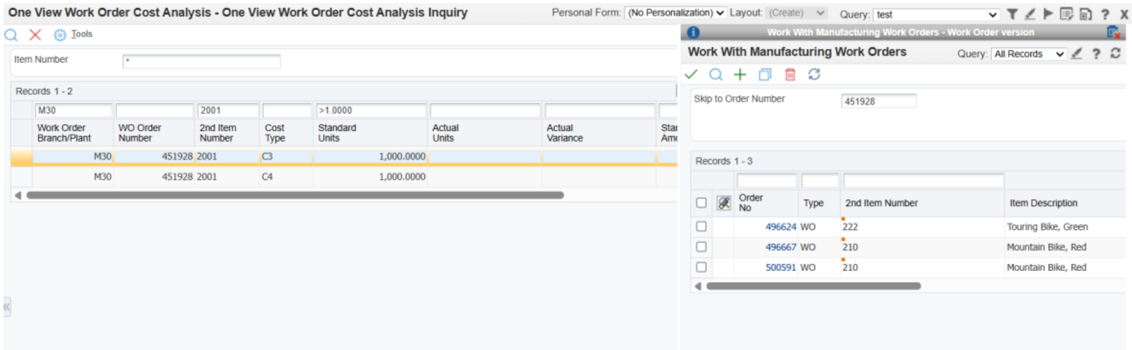


Step 3

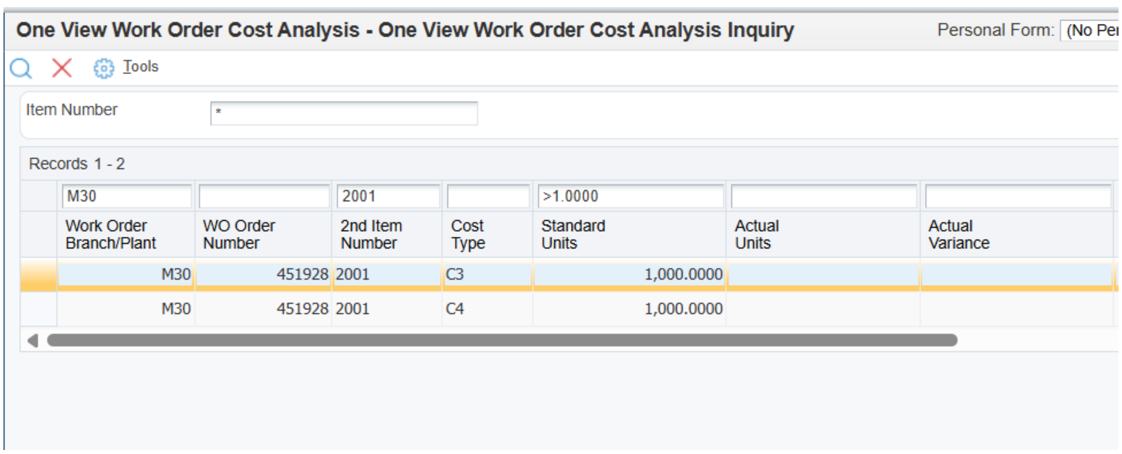
Completed view of first right pane looks like below.

Save the composite with a unique yet clearly understandable name.

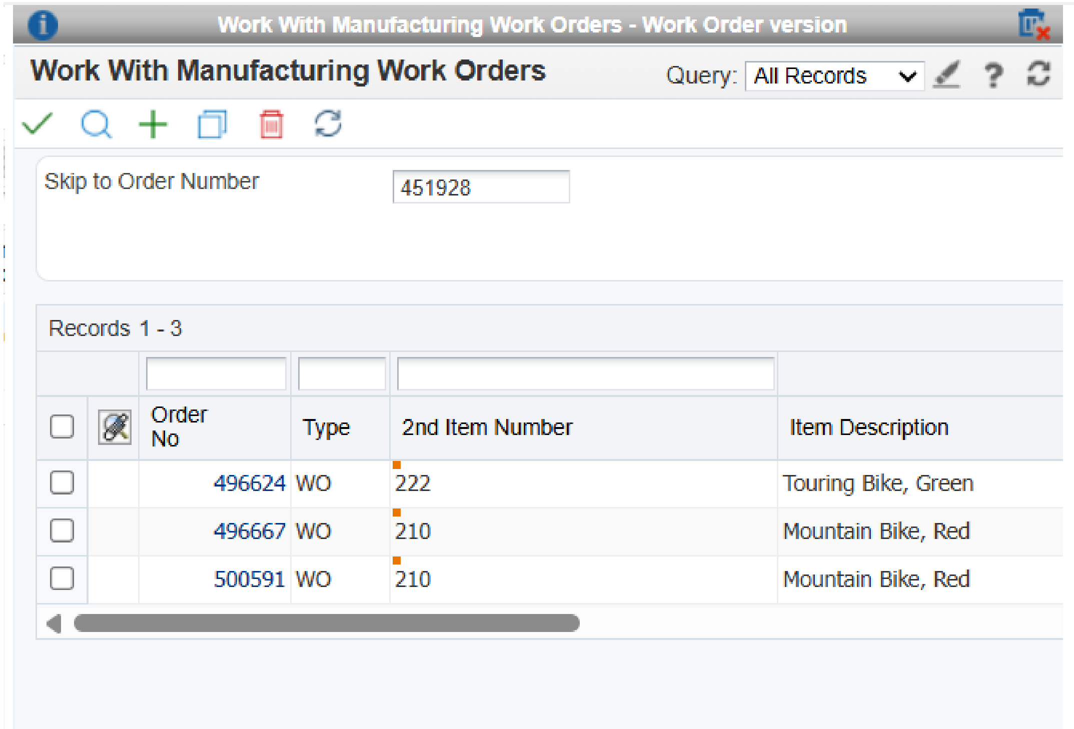
Ask IT for deployment and promotion to PD.



Split view of the left pane



Split view of the right pane


Work With Manufacturing Work Orders - Work Order version
Work With Manufacturing Work Orders
Query: All Records
Skip to Order Number
451928
Records 1 - 3
Order No
Type
2nd Item Number
Item Description
496624 WO 222 Touring Bike, Green
496667 WO 210 Mountain Bike, Red
500591 WO 210 Mountain Bike, Red

CAFE1 Item Branch Composite

Business Requirement:

CAFE1 is a powerful JDE UDO tool to build composite application talking to each other applications. Useful in quick data review as in item branch master data review to complex decision making process like whether to process MRP messages or not. Also useful in management review and S & OP (Sales and operations planning) review sessions. You can prebuild the queries and bring up the CAFE1 application in the group sessions to review data points.

In this example we are tying item branch data to planning data and also quantities tab data. User need not select each row manually and go to row exit for every query.

Technology used: UDO CAFE1.

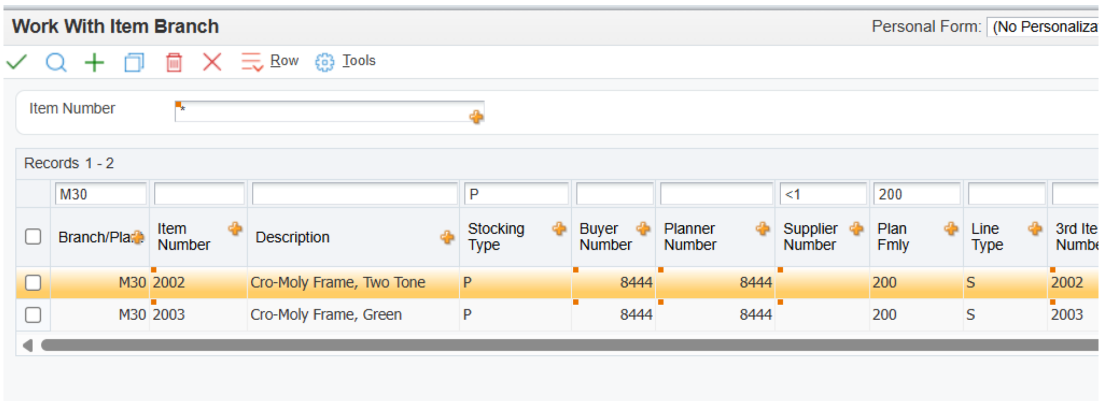
Limitations: Ensure you have security access to generate the CAFE1 UDOs.

Table/Application Used: P41026 Item Branch application

Step 1

Open Item Branch application

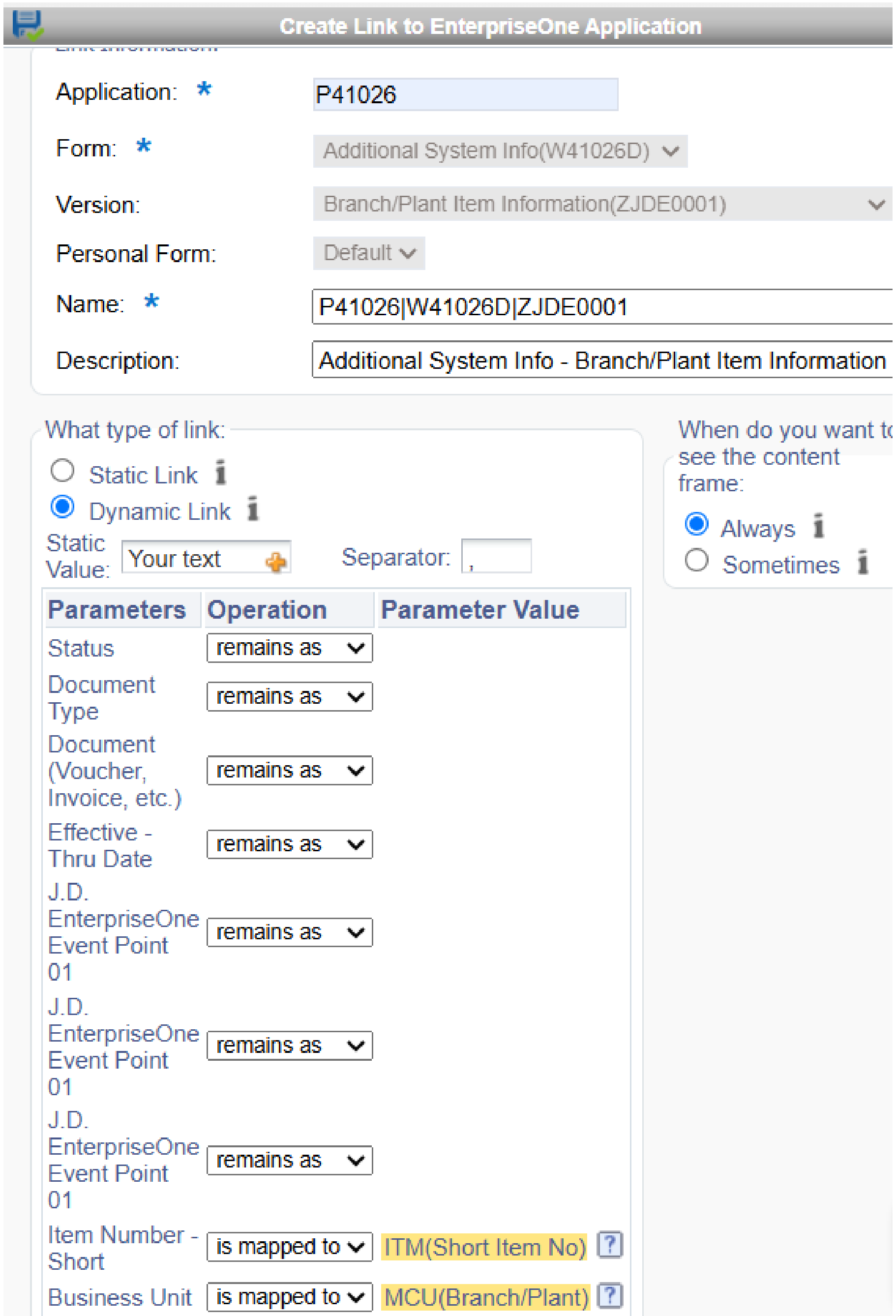
Enter QBE values to filter get sample data. Reformat the grid and/or complete grid extension sessions.

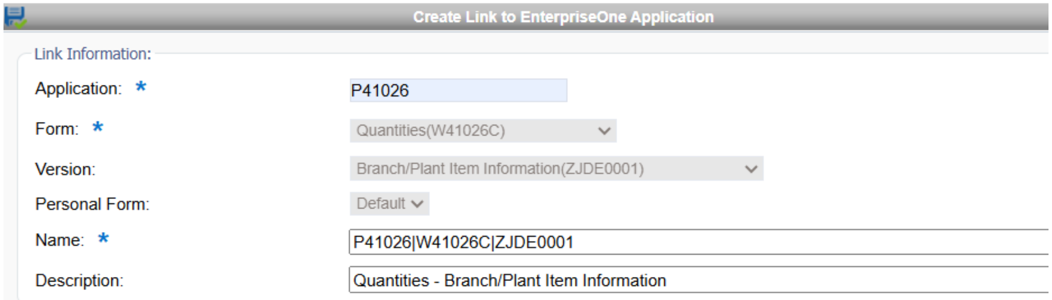


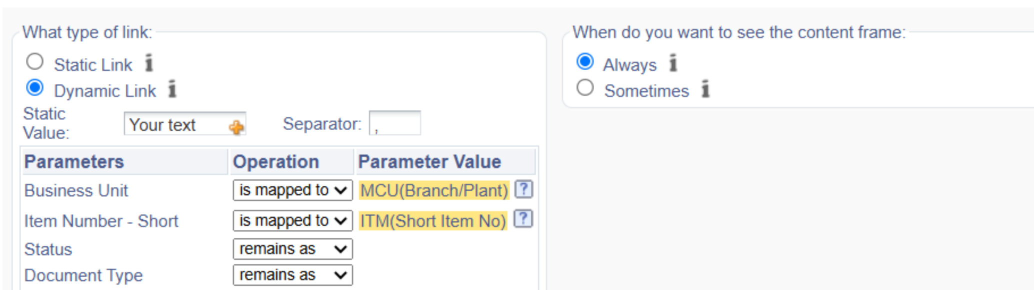
Step 2

Start CAFE1 process of adding another application to the right pane

You can also use different form names to get append composite application view


Create Link to EnterpriseOne Application
Application: *
P41026
Form: *
Additional System Info(W41026D)
Version:
Branch/Plant Item Information(ZJDE0001)
Personal Form:
Default
Name: *
P41026|W41026D|ZJDE0001
Description:
Additional System Info - Branch/Plant Item Information
What type of link:
Static Link
Dynamic Link
Static Value:
Your text
Separator:
,
When do you want to see the content frame:
Always
Sometimes
Parameters
Operation
Parameter Value
Status
remains as
Document Type
remains as
Document (Voucher, Invoice, etc.)
remains as
Effective - Thru Date
remains as
J.D. EnterpriseOne Event Point 01
remains as
J.D. EnterpriseOne Event Point 01
remains as
J.D. EnterpriseOne Event Point 01
remains as
Item Number - Short
is mapped to
ITM(Short Item No)
Business Unit
is mapped to
MCU(Branch/Plant)



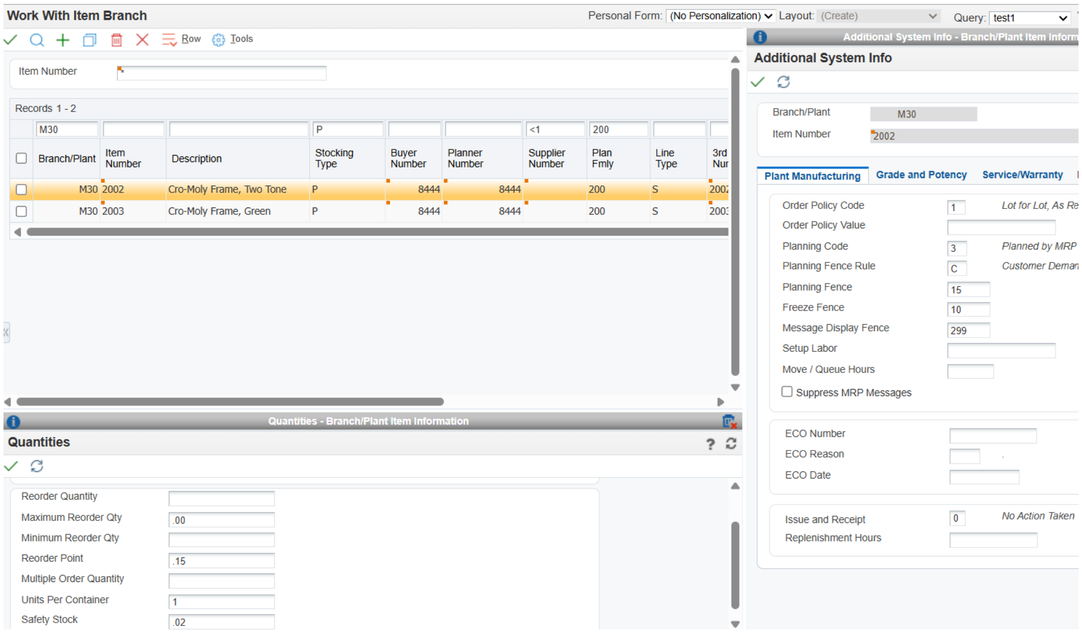


Step 3

Completed view of first right pane looks like below.

Save the composite with a unique yet clearly understandable name.

Ask IT for deployment and promotion to PD.


Work With Item Branch
Personal Form: (No Personalization)
Layout: (Create)
Query: test1
Row
Tools
Item Number
Records 1 - 2
Branch/Plant
Item Number
Description
Stocking Type
Buyer Number
Planner Number
Supplier Number
Plan Fmly
Line Type
M30 2002 Cro-Moly Frame, Two Tone P 8444 8444 200 S
M30 2003 Cro-Moly Frame, Green P 8444 8444 200 S
Quantities - Branch/Plant Item Information
Quantities
Reorder Quantity
Maximum Reorder Qty .00
Minimum Reorder Qty
Reorder Point .15
Multiple Order Quantity
Units Per Container 1
Safety Stock .02
Additional System Info
Branch/Plant M30
Item Number 2002
Plant Manufacturing
Grade and Potency
Service/Warranty
Order Policy Code 1
Order Policy Value
Planning Code 3
Planning Fence Rule C
Planning Fence 15
Freeze Fence 10
Message Display Fence 299
Setup Labor
Move / Queue Hours
Suppress MRP Messages
ECO Number
ECO Reason
ECO Date
Issue and Receipt 0
Replenishment Hours
No Action Taken
Planned by MRP

CAFE1 MRP Review Composite

Business Requirement:

CAFE1 is a powerful JDE UDO tool to build composite application talking to each other applications. Useful in quick data review as in item branch master data review to complex decision making process like whether to process MRP messages or not. Also useful in management review and S & OP (Sales and operations planning) review sessions. You can prebuild the queries and bring up the CAFE1 application in the group sessions to review data points.

In this example we are tying MRP message review application with S&D inquiry & item availability. If a user want to release purchase order OR workorder, he/she can get the total picture in one CAFE1 application. This saves time in switching back to different applications and entering the SKU number(s) again and again.

Technology used: UDO CAFE1.

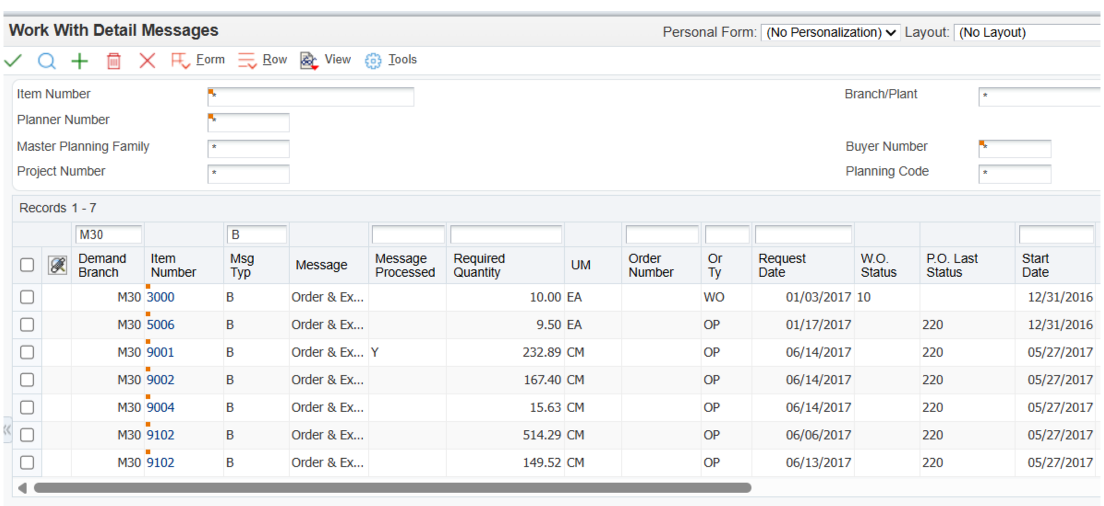
Limitations: Ensure you have security access to generate the CAFE1 UDOs.

Table/Application Used: P3411 MRP Message Review Application

Step 1

Open MRP Message Review application

Enter QBE values to filter get sample data. Reformat the grid and/or complete grid extension sessions.



Work With Detail Messages

Personal Form: (No Personalization) Layout: (No Layout)

Form Row View Tools

Item Number

Branch/Plant

Planner Number

Master Planning Family

Buyer Number

Project Number

Planning Code

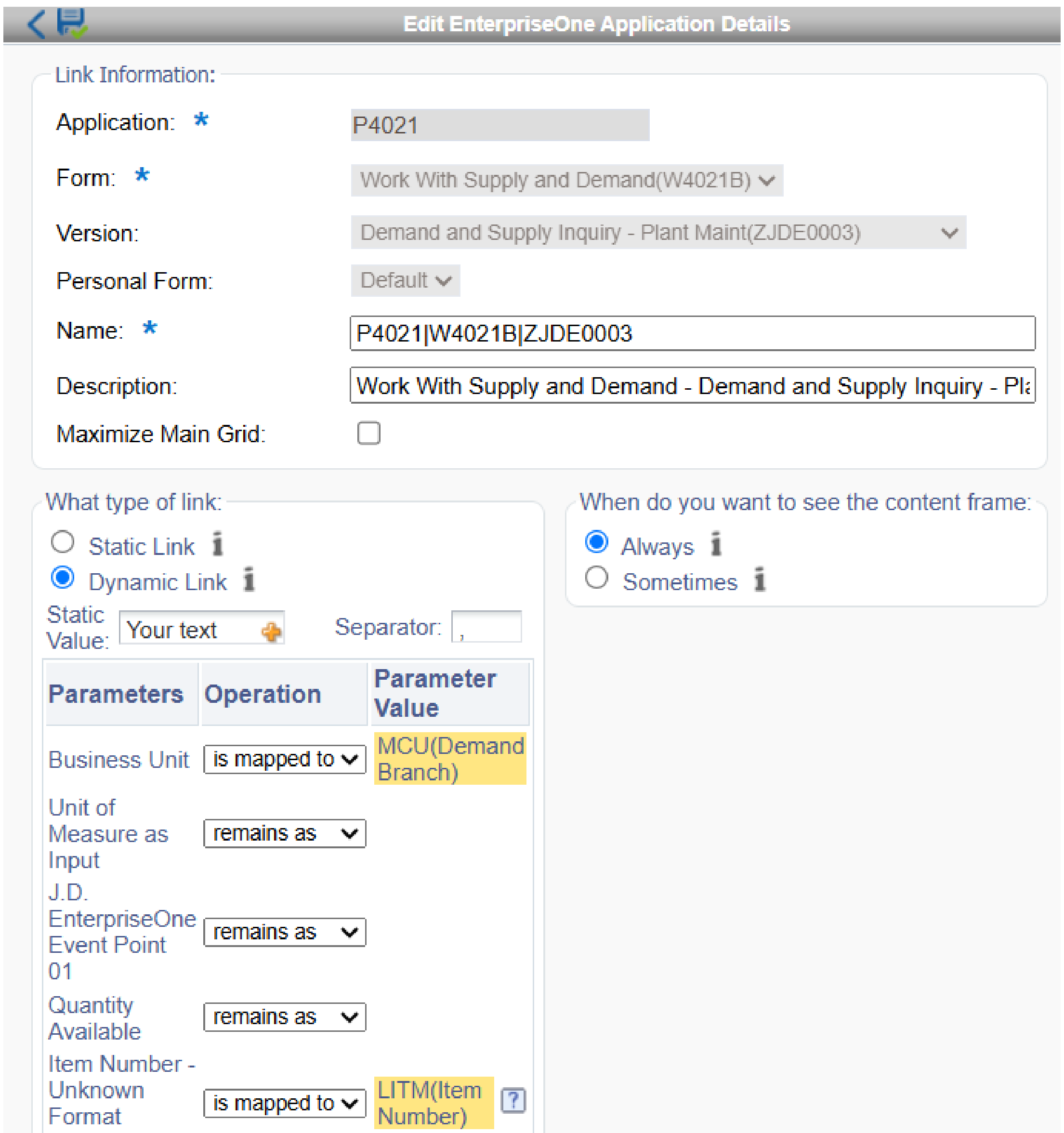
Records 1 - 7

Demand Branch	Item Number	Msg Typ	Message	Message Processed	Required Quantity	UM	Order Number	Or Ty	Request Date	W.O. Status	P.O. Last Status	Start Date
M30		B										
M30	3000	B	Order & Ex...		10.00	EA		WO	01/03/2017	10		12/31/2016
M30	5006	B	Order & Ex...		9.50	EA		OP	01/17/2017		220	12/31/2016
M30	9001	B	Order & Ex...	Y	232.89	CM		OP	06/14/2017		220	05/27/2017
M30	9002	B	Order & Ex...		167.40	CM		OP	06/14/2017		220	05/27/2017
M30	9004	B	Order & Ex...		15.63	CM		OP	06/14/2017		220	05/27/2017
M30	9102	B	Order & Ex...		514.29	CM		OP	06/06/2017		220	05/27/2017
M30	9102	B	Order & Ex...		149.52	CM		OP	06/13/2017		220	05/27/2017

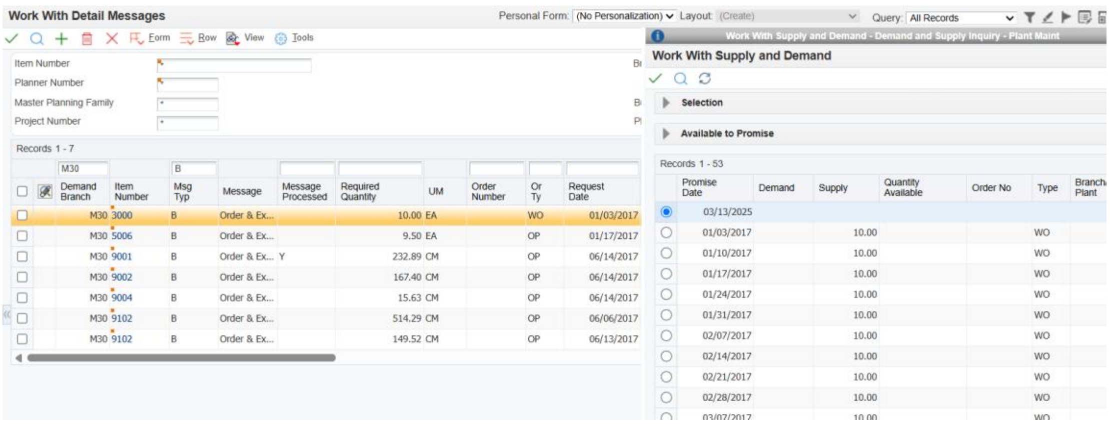
Step 2

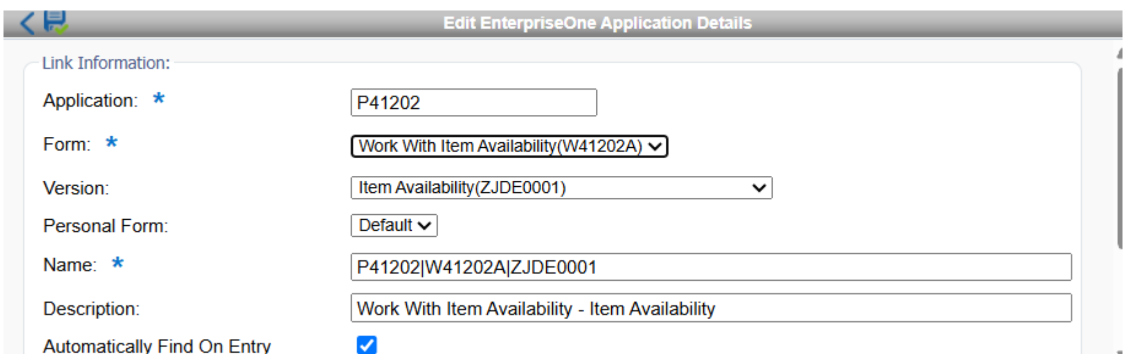
Start CAFE1 process of adding another application to the right pane

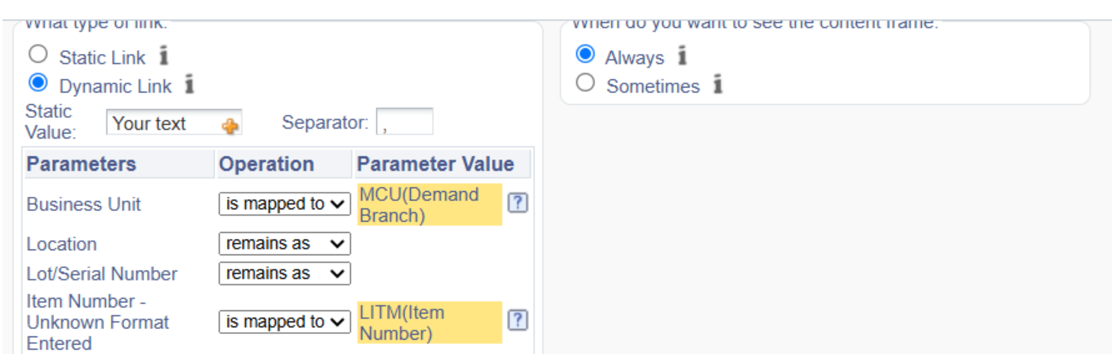
You can also use different form names to get append composite application view



Add additional application.





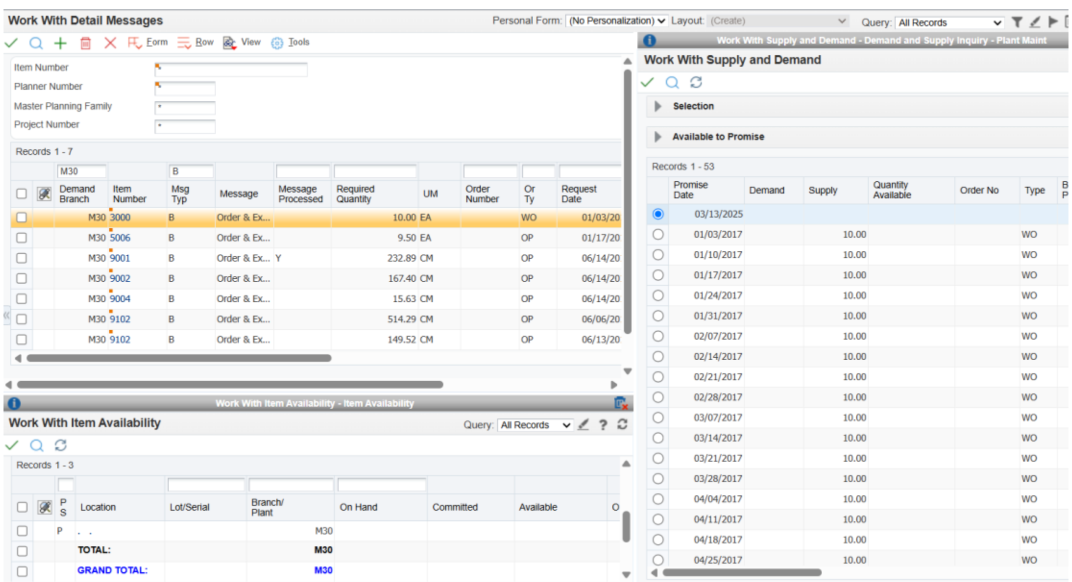


Step 3

Completed view of first right pane looks like below.

Save the composite with a unique yet clearly understandable name.

Ask IT for deployment and promotion to PD.



CAFE1 Sales Orders Composite

Business Requirement:

CAFE1 is a powerful JDE UDO tool to build composite application talking to each other applications. Useful in quick data review as in item branch master data review to complex decision making process like whether to process MRP messages or not. Also useful in management review and S & OP (Sales and operations planning) review sessions. You can prebuild the queries and bring up the CAFE1 application in the group sessions to review data points.

In this example we are tying sales order review application with S&D inquiry & item availability. If a user want to process sales orders into pick/pack, he/she can get the total picture in one CAFE1 application. This saves time in switching back to different applications and entering the SKU number(s) again and again.

Technology used: UDO CAFE1.

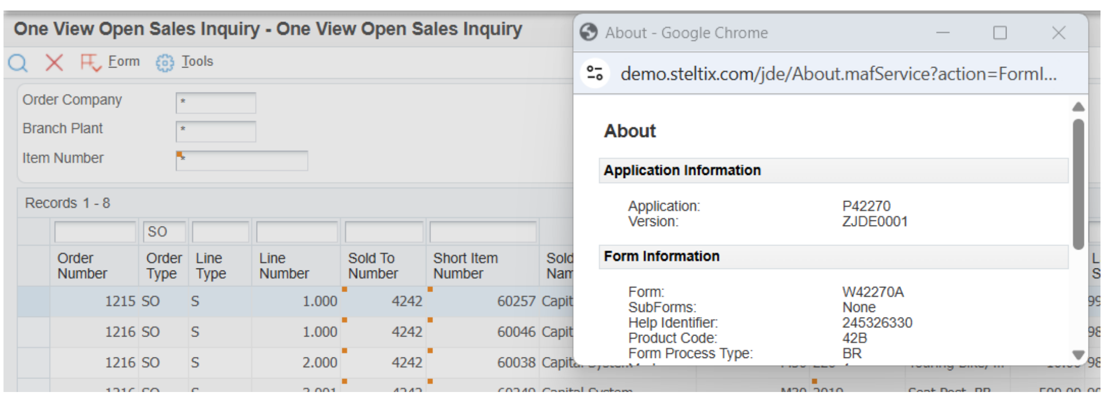
Limitations: Ensure you have security access to generate the CAFE1 UDOs.

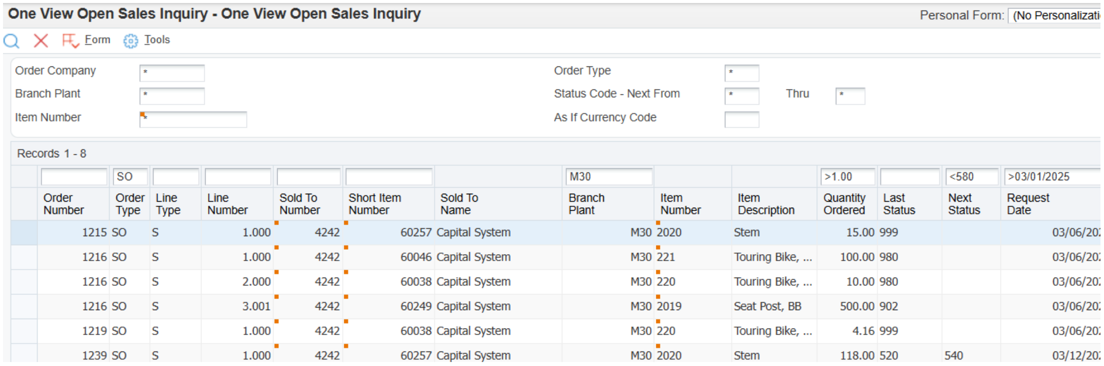
Table/Application Used: One View Open Sales Inquiry

Step 1

Open One View Open Sales Inquiry

Enter QBE values to filter get sample data. Reformat the grid and/or complete grid extension sessions.




One View Open Sales Inquiry - One View Open Sales Inquiry

Personal Form: (No Personalizati

Form Tools

Order Company *
Branch Plant *
Item Number
Order Type *
Status Code - Next From * Thru *
As If Currency Code

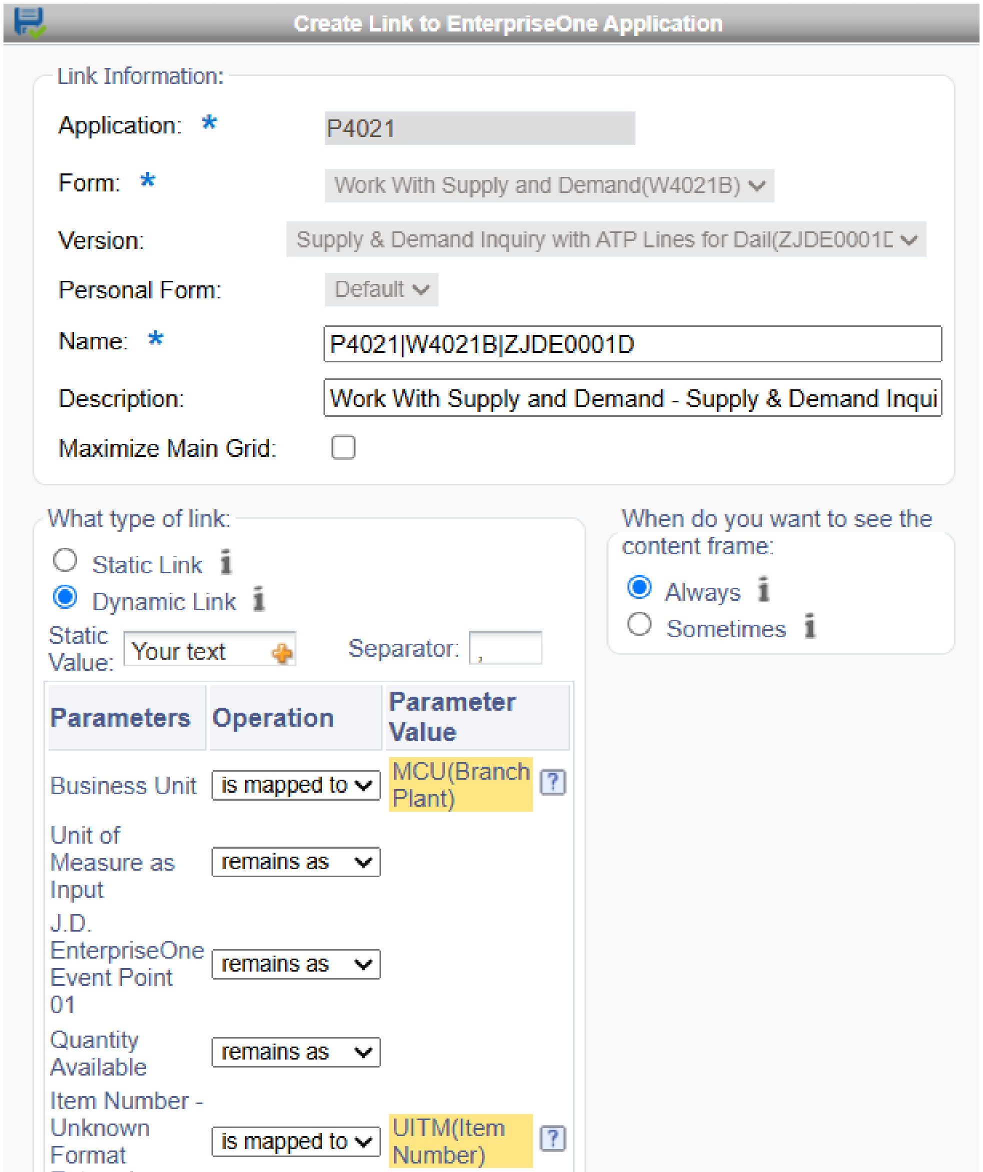
Records 1 - 8

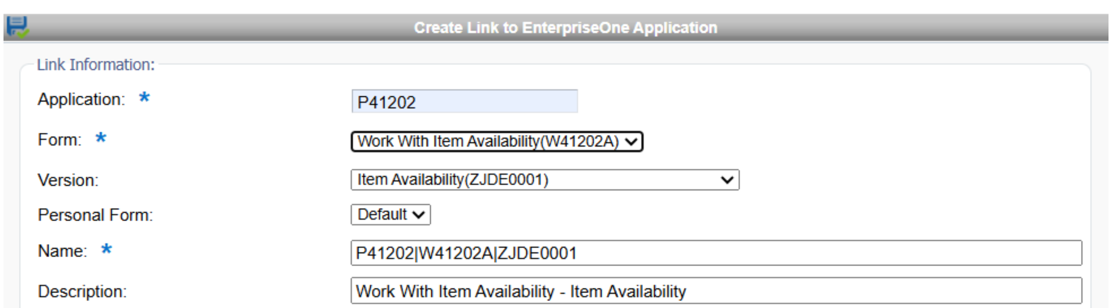
Order Number	Order Type	Line Type	Line Number	Sold To Number	Short Item Number	Sold To Name	Branch Plant	Item Number	Item Description	Quantity Ordered	Last Status	Next Status	Request Date
	SO						M30			>1.00		<580	>03/01/2025
1215	SO	S	1.000	4242	60257	Capital System	M30	2020	Stem	15.00	999		03/06/20
1216	SO	S	1.000	4242	60046	Capital System	M30	221	Touring Bike, ...	100.00	980		03/06/20
1216	SO	S	2.000	4242	60038	Capital System	M30	220	Touring Bike, ...	10.00	980		03/06/20
1216	SO	S	3.001	4242	60249	Capital System	M30	2019	Seat Post, BB	500.00	902		03/06/20
1219	SO	S	1.000	4242	60038	Capital System	M30	220	Touring Bike, ...	4.16	999		03/06/20
1239	SO	S	1.000	4242	60257	Capital System	M30	2020	Stem	118.00	520	540	03/12/20

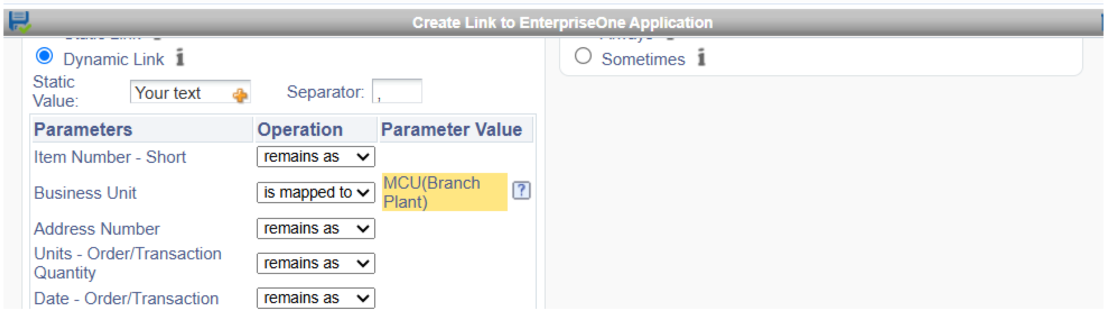
Step 2

Start CAFE1 process of adding another application to the right pane

You can also use different form names to get append composite application view


Create Link to EnterpriseOne Application
Link Information:
Application: *
P4021
Form: *
Work With Supply and Demand(W4021B)
Version:
Supply & Demand Inquiry with ATP Lines for Dail(ZJDE0001D
Personal Form:
Default
Name: *
P4021|W4021B|ZJDE0001D
Description:
Work With Supply and Demand - Supply & Demand Inqui
Maximize Main Grid:
What type of link:
Static Link
Dynamic Link
Static Value:
Your text
Separator:
Parameters
Operation
Parameter Value
Business Unit
is mapped to
MCU(Branch Plant)
Unit of Measure as Input
remains as
J.D. EnterpriseOne Event Point 01
remains as
Quantity Available
remains as
Item Number - Unknown Format
is mapped to
UITM(Item Number)
When do you want to see the content frame:
Always
Sometimes


Create Link to EnterpriseOne Application
Link Information:
Application: *
P41202
Form: *
Work With Item Availability(W41202A)
Version:
Item Availability(ZJDE0001)
Personal Form:
Default
Name: *
P41202|W41202A|ZJDE0001
Description:
Work With Item Availability - Item Availability

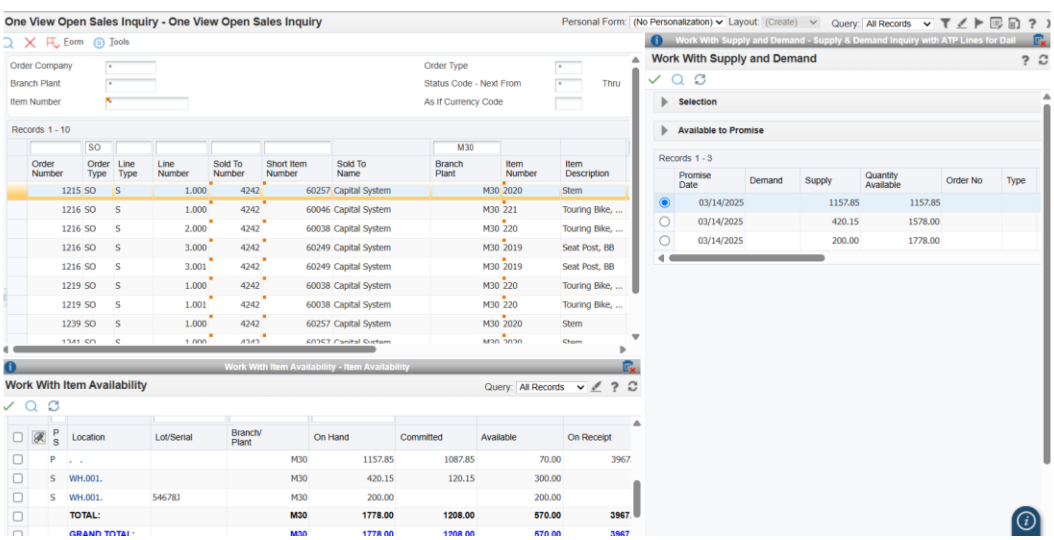


Step 3

Completed view of first right pane looks like below.

Save the composite with a unique yet clearly understandable name.

Ask IT for deployment and promotion to PD.



CAFE1 Item UOM Composite

Business Requirement:

CAFE1 is a powerful JDE UDO tool to build composite application talking to each other applications. Useful in quick data review as in item branch master data review to complex decision making process like whether to process MRP messages or not. Also useful in management review and S & OP (Sales and operations planning) review sessions. You can prebuild the queries and bring up the CAFE1 application in the group sessions to review data points.

In this example we are tying item branch application with uom screen in item master combined with UOM conversions and regular UOM standard conversion, he/she can get the total picture in one CAFE1 application. This saves time in switching back to different applications and entering the SKU number(s) again and again. **Also important in troubleshooting if the**

transaction fails due to lack of correct uom conversion factor under that specific branch.

Technology used: UDO CAFE1.

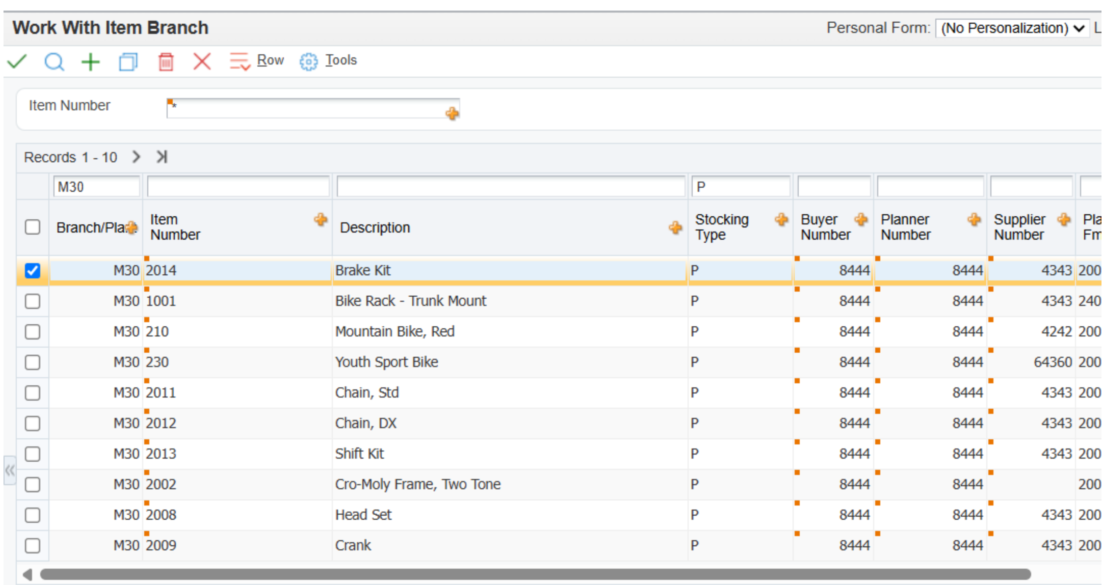
Limitations: Ensure you have security access to generate the CAFE1 UDOs.

Table/Application Used: One View Open Sales Inquiry

Step 1

Open Item branch application

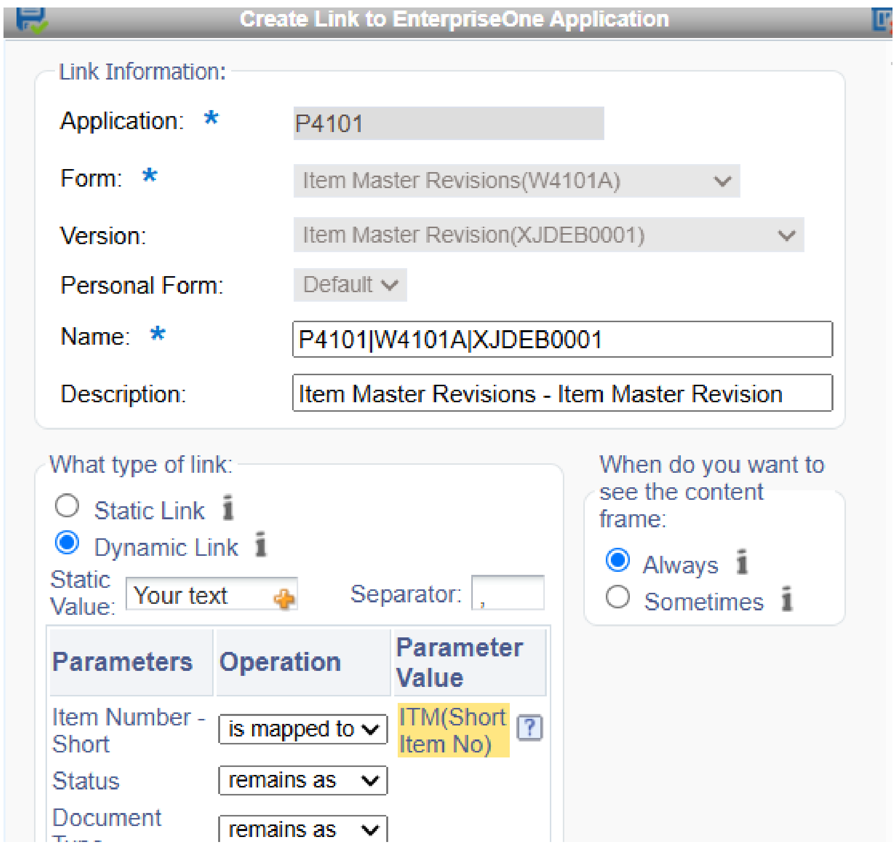
Enter QBE values to filter get sample data. Reformat the grid and/or complete grid extension sessions.

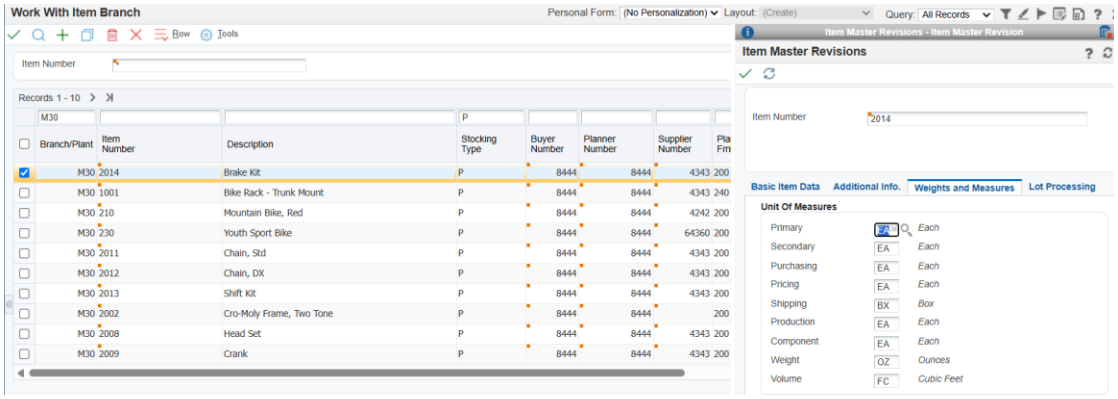


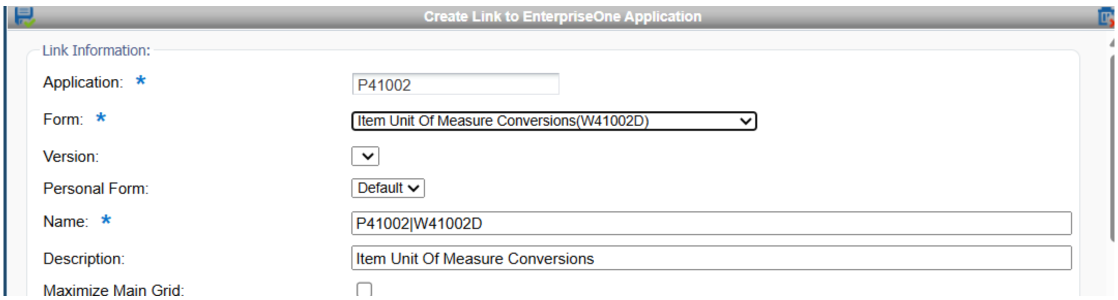
Step 2

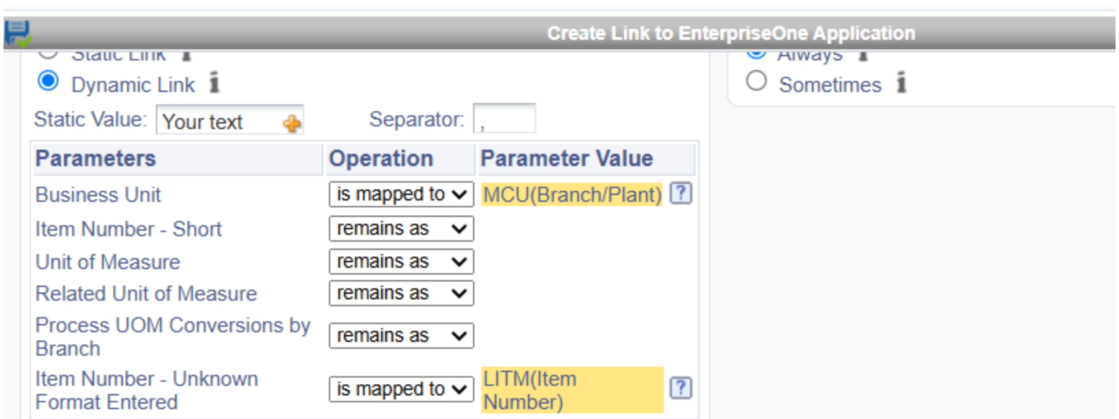
Start CAFE1 process of adding another application to the right pane

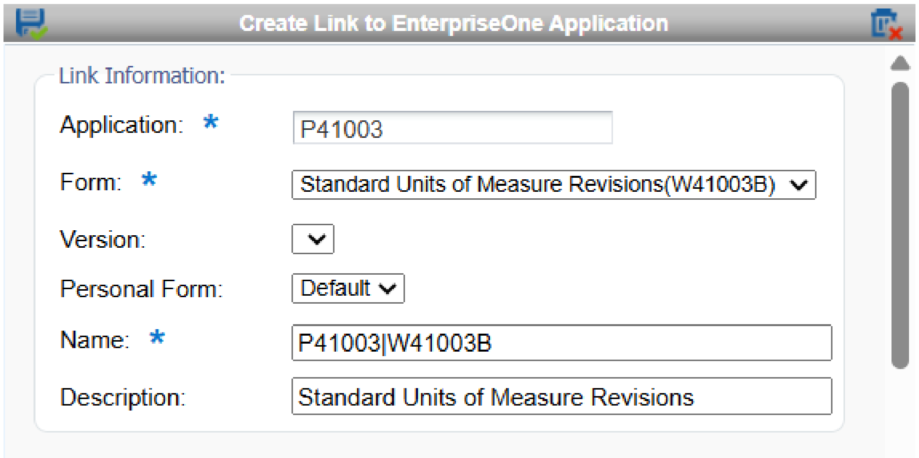
You can also use different form names to get append composite application view

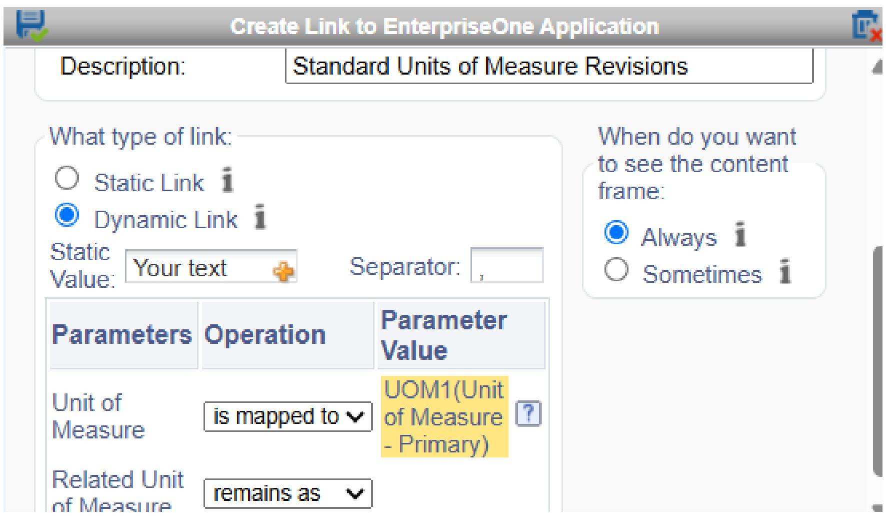



Work With Item Branch
Personal Form: (No Personalization)
Layout: (Create)
Query: All Records
Row
Tools
Item Number
Records 1 - 10
Branch/Plant
Item Number
Description
Stocking Type
Buyer Number
Planner Number
Supplier Number
M30 2014 Brake Kit P 8444 8444 4343
M30 1001 Bike Rack - Trunk Mount P 8444 8444 4343
M30 210 Mountain Bike, Red P 8444 8444 4242
M30 230 Youth Sport Bike P 8444 8444 64360
M30 2011 Chain, Std P 8444 8444 4343
M30 2012 Chain, DX P 8444 8444 4343
M30 2013 Shift Kit P 8444 8444 4343
M30 2002 Cro-Moly Frame, Two Tone P 8444 8444
M30 2008 Head Set P 8444 8444 4343
M30 2009 Crank P 8444 8444 4343
Item Master Revisions - Item Master Revision
Item Master Revisions
Item Number 2014
Basic Item Data
Additional Info.
Weights and Measures
Lot Processing
Unit Of Measures
Primary EA Each
Secondary EA Each
Purchasing EA Each
Pricing EA Each
Shipping BX Box
Production EA Each
Component EA Each
Weight OZ Ounces
Volume FC Cubic Feet


Create Link to EnterpriseOne Application
Link Information:
Application: *
P41002
Form: *
Item Unit Of Measure Conversions(W41002D)
Version:
Personal Form:
Default
Name: *
P41002|W41002D
Description:
Item Unit Of Measure Conversions
Maximize Main Grid:


Create Link to EnterpriseOne Application
Dynamic Link
Sometimes
Static Value:
Your text
Separator:
Parameters
Operation
Parameter Value
Business Unit
is mapped to
MCU(Branch/Plant)
Item Number - Short
remains as
Unit of Measure
remains as
Related Unit of Measure
remains as
Process UOM Conversions by Branch
remains as
Item Number - Unknown Format Entered
is mapped to
LITM(Item Number)



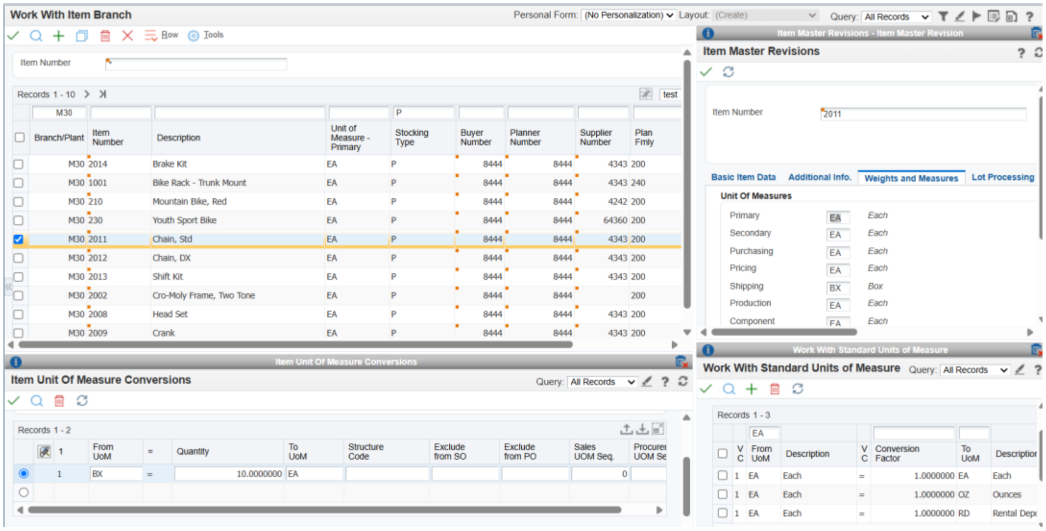


Step 3

Completed view of first right pane looks like below.

Save the composite with a unique yet clearly understandable name.

Ask IT for deployment and promotion to PD.


Work With Item Branch
Item Master Revisions
Item Unit Of Measure Conversions
Work With Standard Units of Measure

CAFE1 On hand vs Safetystock

Business Requirement:

You are troubleshooting MRP messages on why certain products/components are coming up with more buy messages. Or some users ask you information on current inventory compared to the safety stock value assigned. Instead of running some custom reports (or) ask IT to do SQL query (or) look into multiple JDE applications (which takes time), this CAFE1 will answer the question instantly.

Technology used: CAFE1

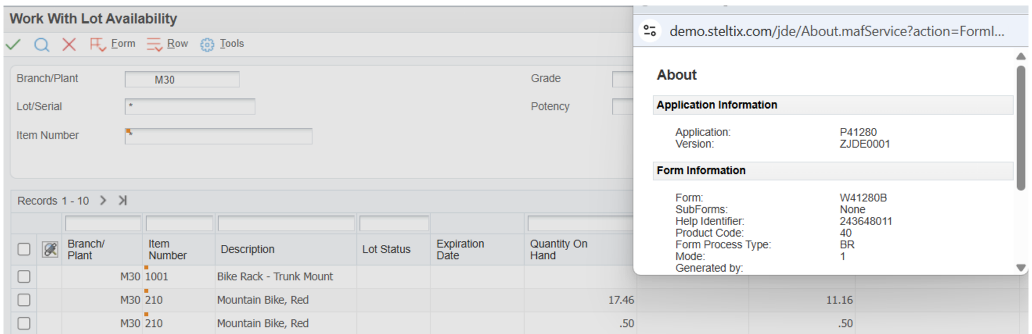
Limitations: In this CAFE1 example we are using cost inquiry application to know current on-hand, which could be at different location, hence user need to total up all the locations manually. **Another quick solution is to replace oneview cost inquiry P41271 with lot availability application P41280**

Table/Application Used: P41271 OR P41280, P41026

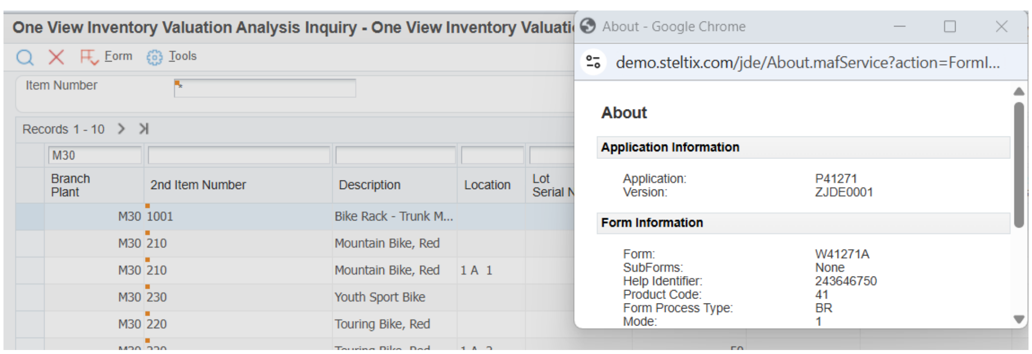
Step 1

Open UX one cost inquiry application

P41280



P41271

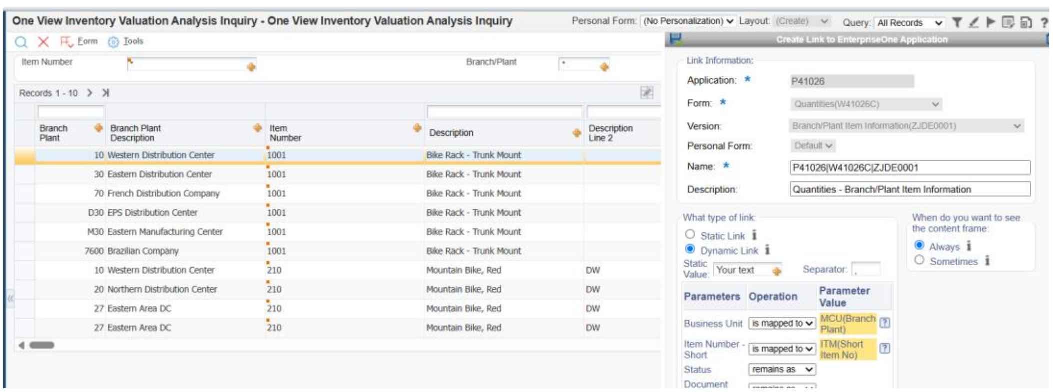


P3425

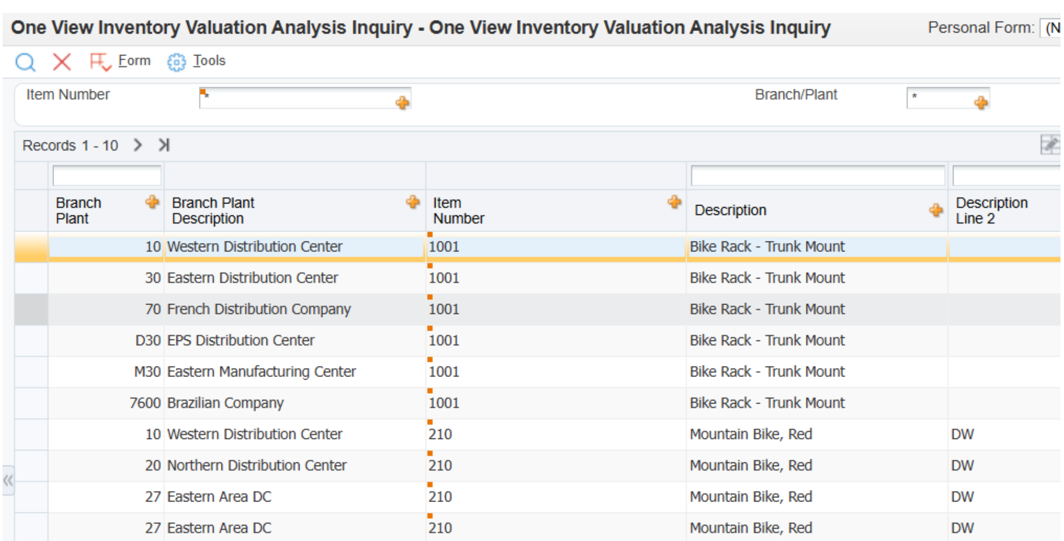
STEP 2

On the primary application (in this example P41271) click edit form layout under your profile name (top right). Cafe1 window will open up. Select E1 application and drag/drop the window to the right pane. Select the values/application as defined below

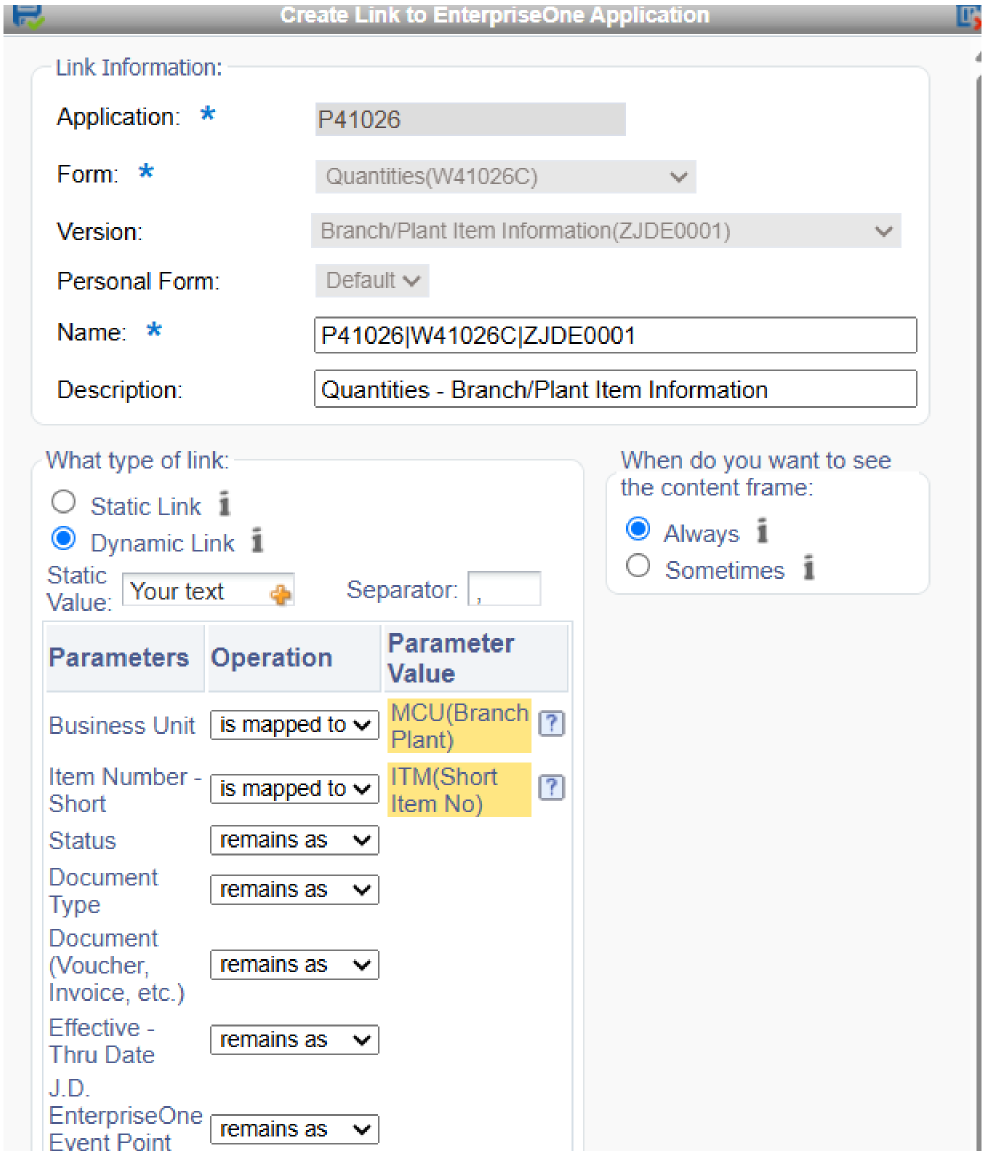
Cafe1 composite page below



Left pane split below for better visual clarity



Right pane split below for better visual clarity



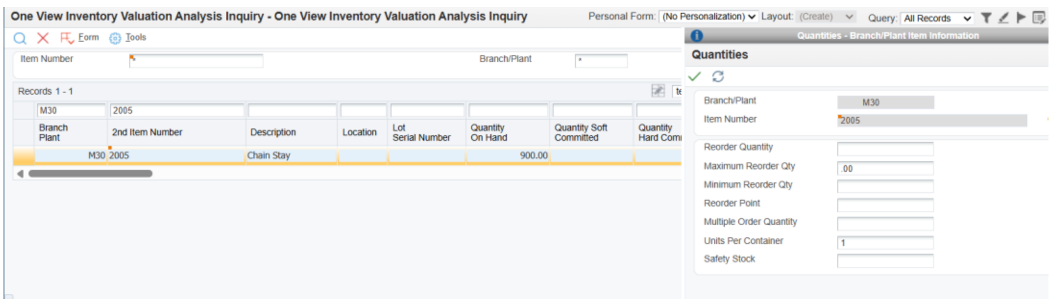
Step 3

Final Cafe 1 layout composite view

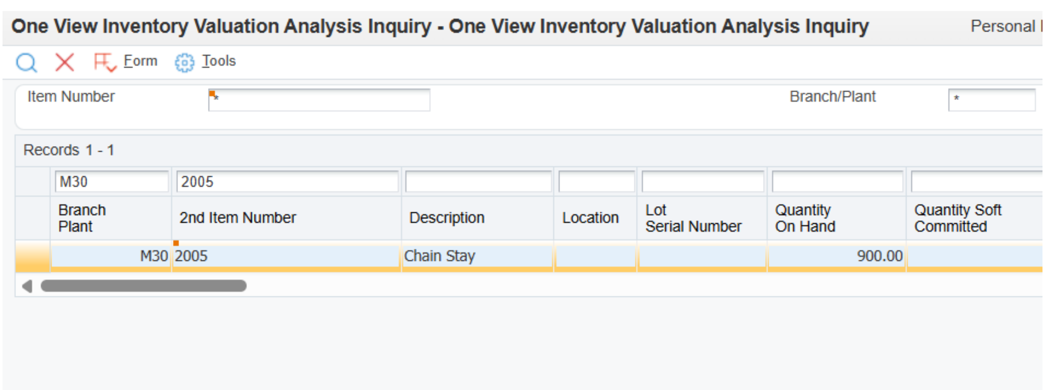
Location field is visible in this application. Filter out data and select the row, CAFE1 will bring the safetystock/quantities view on your right pane.

Save the composite with a unique yet clearly understandable name.

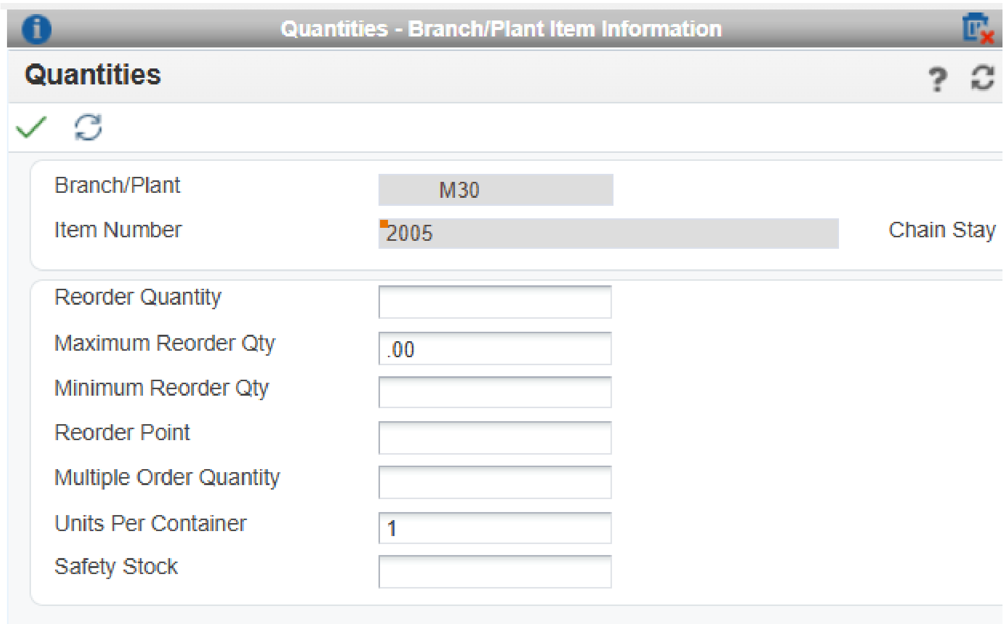
Ask IT for deployment and promotion to PD.



Left side piece for clarity



Right side piece for clarity


Quantities - Branch/Plant Item Information
Quantities
Branch/Plant
M30
Item Number
2005
Chain Stay
Reorder Quantity
Maximum Reorder Qty
.00
Minimum Reorder Qty
Reorder Point
Multiple Order Quantity
Units Per Container
1
Safety Stock

Grid Extension: Item Branch

Business Requirement:

Many users across the organization has access to Item Branch application. User role security will define whether they have full control or partial read only view. Please query data for various exceptions. There is no need to generate static reports on data extract on item branch table or ask IT for SQL extract dump. With grid extension, you can bring key values which are normally in the row exit options. Have all required fields visible in the grid help you to filter out data on exceptions, example planning code=1 but no other planning values populated. Message display fence=0 and you are wondering why there are no MRP messages yet!

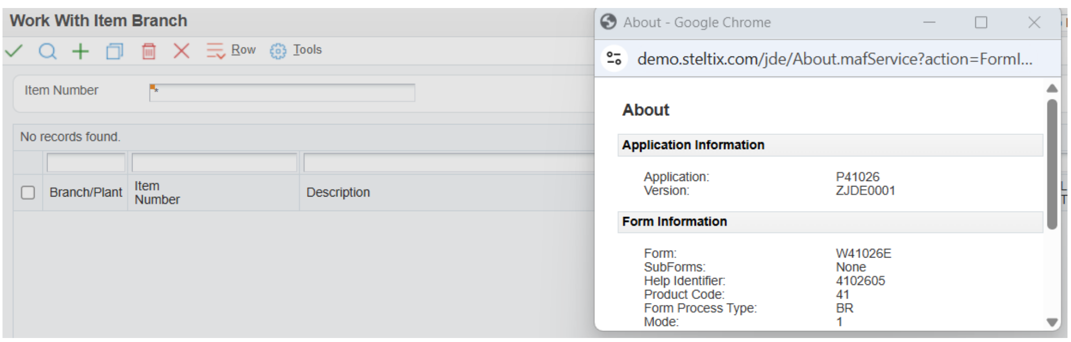
Technology used: Item Branch application

Limitations: None. Please check security granted to right roles

Table/Application Used: P41026

Step 1

Open this application from your menu. If it does not exists, ask IT to deploy to your security role. You will be testing this in non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2

Customize the grid (example below), place some QBE values to get valid data points

Save the composite with a unique yet clearly understandable name.

Ask IT for deployment and promotion to PD.

Work With Item Branch

Personal Form: (No Personalization) Layout: (No Layout)

Row Tools

Item Number *

Records 1 - 5

Branch/Plant	Item Number	Description	Stocking Type	Buyer Number	Planner Number	Supplier Number	Plan Fmly	Line Type
M30		P*	S					
M30	TW60EX	Pallet Type #3	S					S
M30	AP020	Parent (Commitments)	S					S
M30	AP002	Parent Item	S					S
M30	AP001	Parent Item 2nd	S					S
M30	740931	Protective Eyewear	S					S

Short Item No	Freeze Time Fence Days	Issue Type Code	Order Policy Code	Order Policy Code	Planning Time Fence Days	Planning Time Fence Rule	Planning Code	Message Time Fence Days	Leadtime Level
60193		I	1	1			2		5
60003		I	1	1			2		5
60011		I	1	1			2		15
60020		I	1	1			2		10
60169		I	1	1			2		5
60177	10	U	1	1	15	C	3	60	5
60185		I	1	1			2		5
60071		I	1	1			2		15
60134		I	1	1			2		5
60142	10	U	1	1	15	C	3	60	5

test

Short Item No	Freeze Time Fence Days	Issue Type Code	Order Policy Code	Order Policy Code	Planning Time Fence Days	Planning Time Fence Rule	Planning Code	Message Time Fence Days	Leadtime Level
								<1	>1
60775		I	1	1			2		20
60716		I	1	1			2		5
723962		I	1	1			2		2
60863		I	1	1			2		25
60871		I	1	1			2		25
60880		I	1	1			2		4
60898		I	1	1			2		4
723971		I	1	1			2		2
723989		I	1	1			2		2
723997		I	1	1			2		2

NOTE: This above example shows all planning parameters brought into the main grid. This could be expanded for bringing all category codes into the main grid. And bringing all quantities fields is another example. This will save user time by going into each row exit multiple times. They can achieve similar purpose by using data browser but that needs separate security discussions.

This type of grid extensions are helpful in making many custom watchlist on data exceptions and alerts.

Grid Extension: Customer Billing Instructions

Business Requirement:

You are working in the group responsible for address book maintenance and/or you work as CSR and need to customer profiles & configurations. It takes time and effort to query data from regular JDE applications. You have identify the customer, go to row exit & then go to different tabs.

What if all critical fields can be brought into main grid?. Grid extensions helps you handle that process.

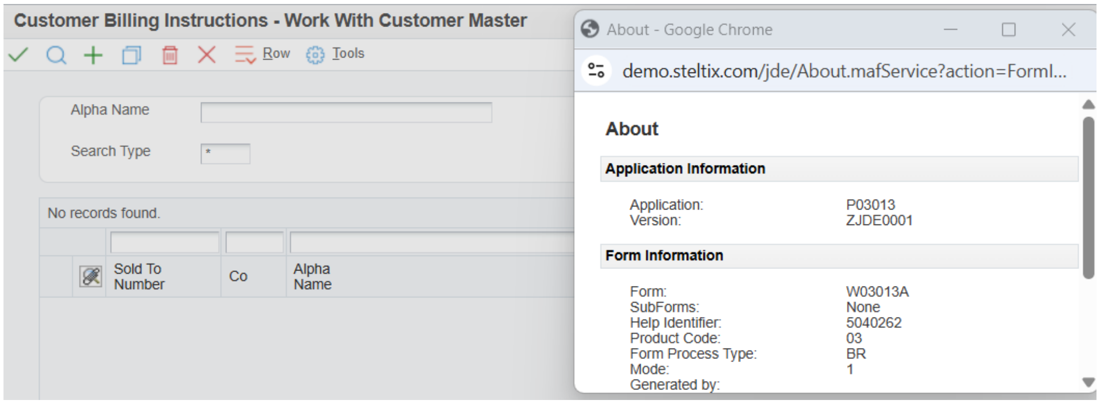
Technology used: Customer Master application

Limitations: Adhere to your current role security and controls

Table/Application Used: P03013

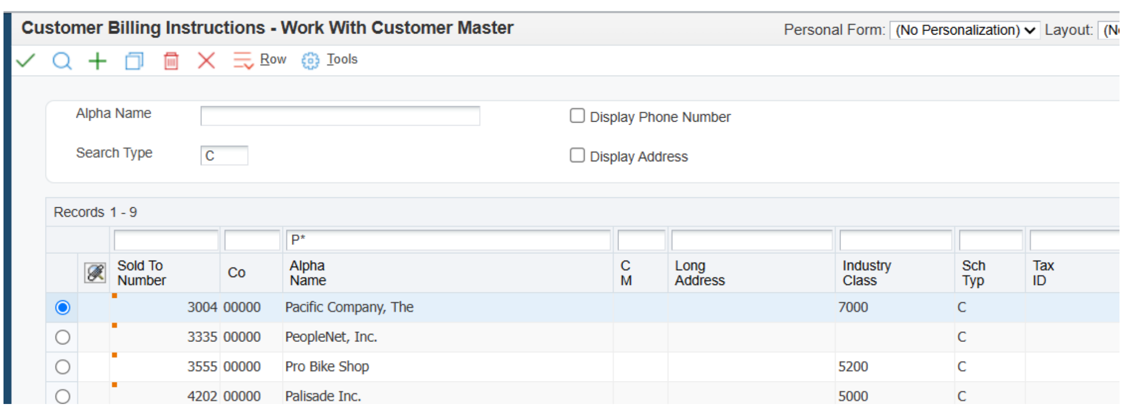
Step 1

Open this application from your menu. If it does not exists, ask IT to deploy to your security role. You will be testing this in non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2

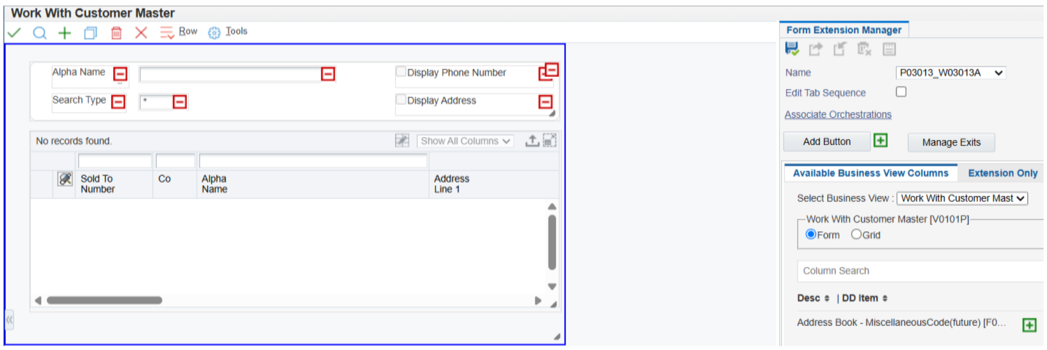
Customize the grid (example below), place some QBE values to get valid data points



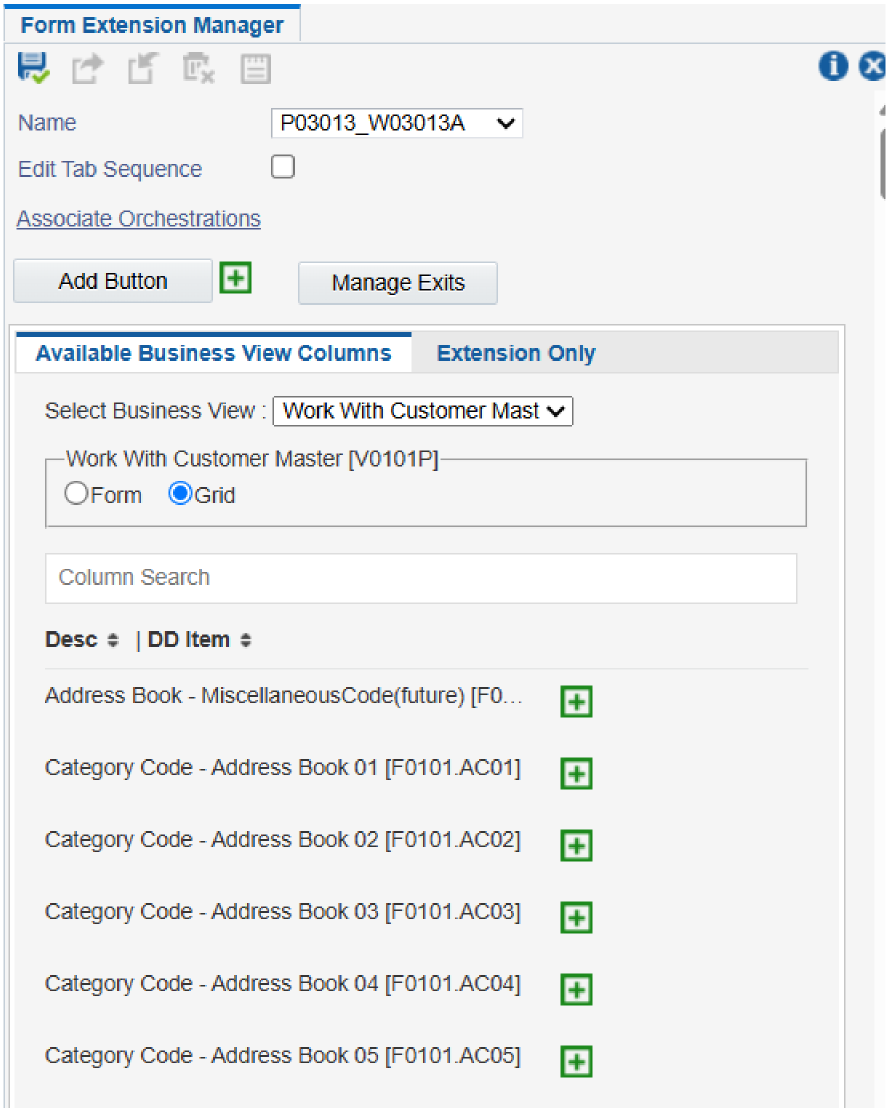
Step 3

Click on the form extension manager icon on your top right.

If a side window does not open up, check back with IT whether this feature is enabled across your system.



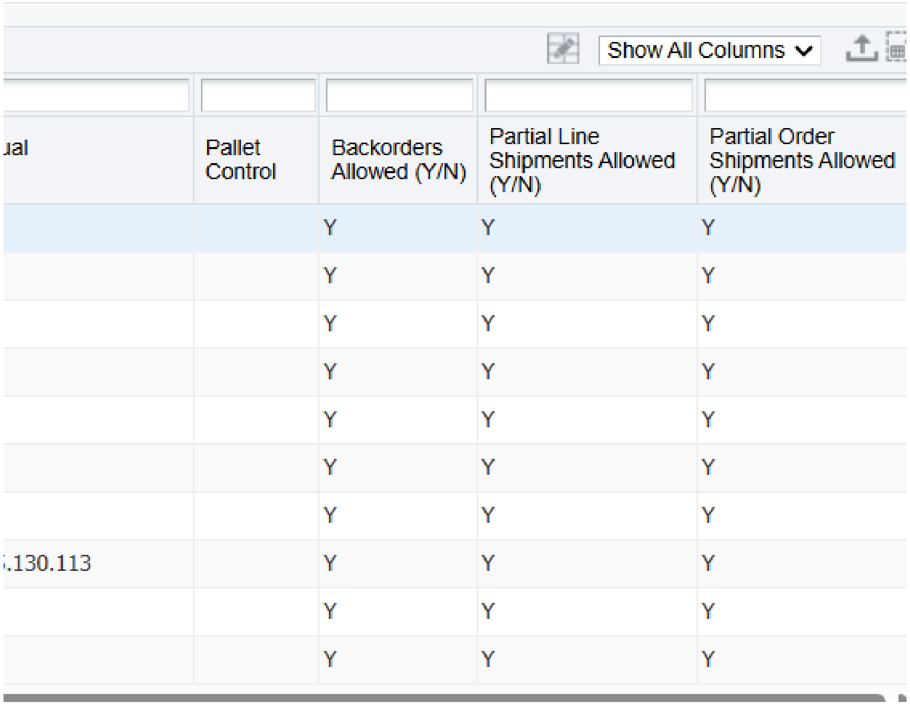
Click on grid radio button on the app shown below. **Click on Desc sort icon to get all the fields in the naming order, it helps to find your fields quicker**



Click on the plus icon on fields you wanted to get added.

Press the save button (no prompt for name given). Close the blue x mark

The following three fields are added to your main grid (a [portion of the grid show below for clarity in view)



Show All Columns

ual	Pallet Control	Backorders Allowed (Y/N)	Partial Line Shipments Allowed (Y/N)	Partial Order Shipments Allowed (Y/N)
		Y	Y	Y
		Y	Y	Y
		Y	Y	Y
		Y	Y	Y
		Y	Y	Y
		Y	Y	Y
		Y	Y	Y
.130.113		Y	Y	Y
		Y	Y	Y
		Y	Y	Y

Give a unique grid customization name, once realign the fields.

Step 4

This grid customization need to be deployed using WEB OMW or regular OMW. Provide the list of roles involved with this application/grid.

Save the composite with a unique yet clearly understandable name.

Ask IT for deployment and promotion to PD.

NOTE: A very simple example is given in this section. You can bring many more fields like last user updated, last update date, etc. into the grid for quicker audits. This avoids going to IT for running SQL queries which gets outdated quickly.

Personal Form Work Order Entry

Business Requirement:

Work orders gets created from 1- auto sales order entry process, 2-configurator process, 3- MRP workorder message processing activity, etc. Work orders can also be entered manually for the make part and/or for as a parent workorder linking multiple child work orders. And most of the time changes to work order transaction are handled in p48013 application.

This application has many tabs and it takes time to tab through if you are processing multiple orders. Personal form consolidates all such required field into a single tab and you have the option of making any field as a required one in data entry.

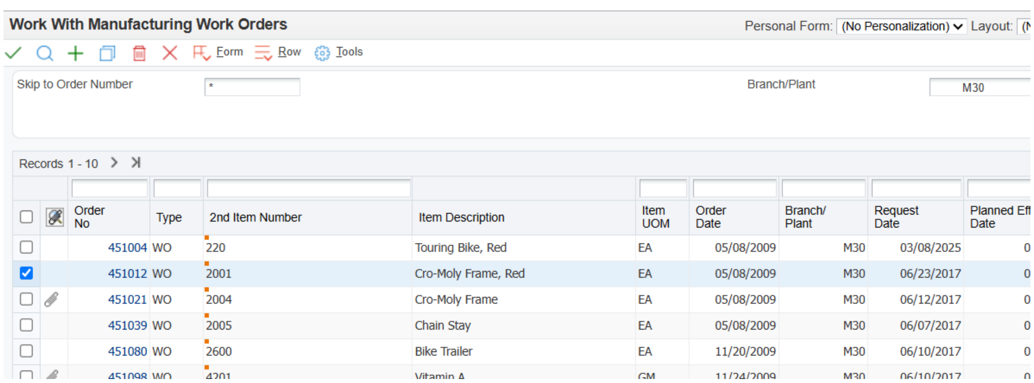
Technology used: Work Order Entry

Limitations: Adhere to your current role security and controls to create personal forms

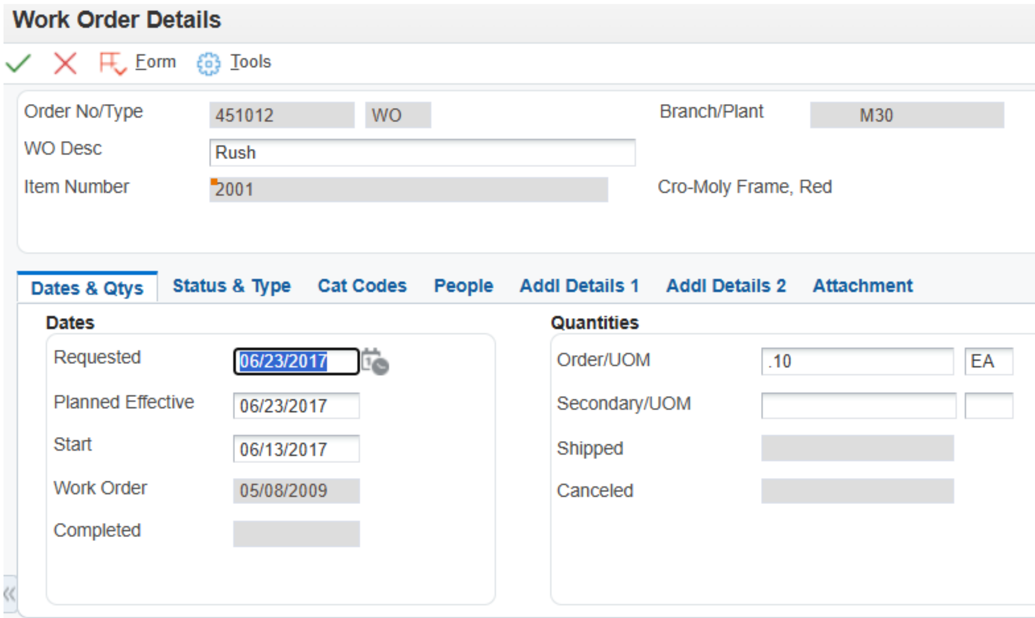
Table/Application Used: P48013

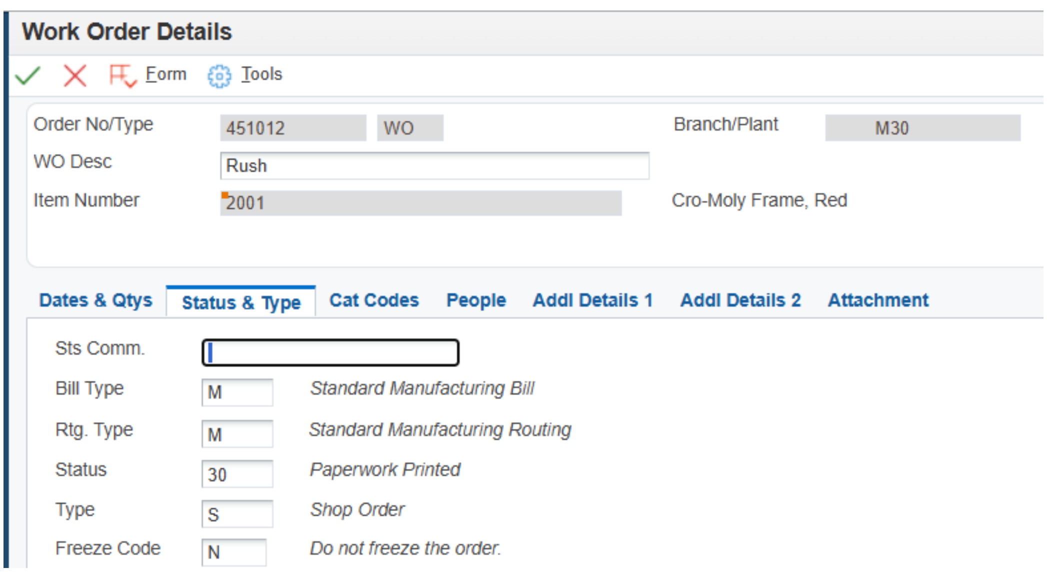
Step 1

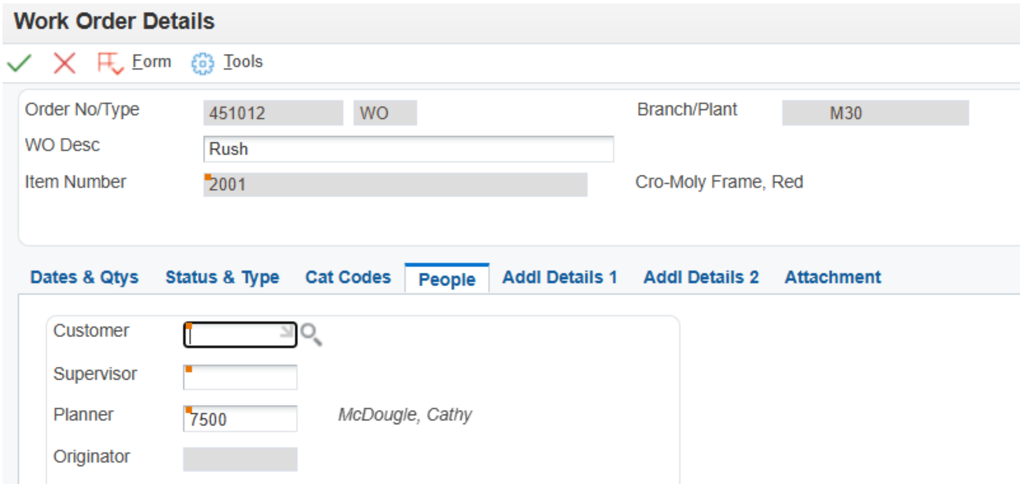
Open this application from your menu. If it does not exists, ask IT to deploy to your security role. You will be testing this in non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists

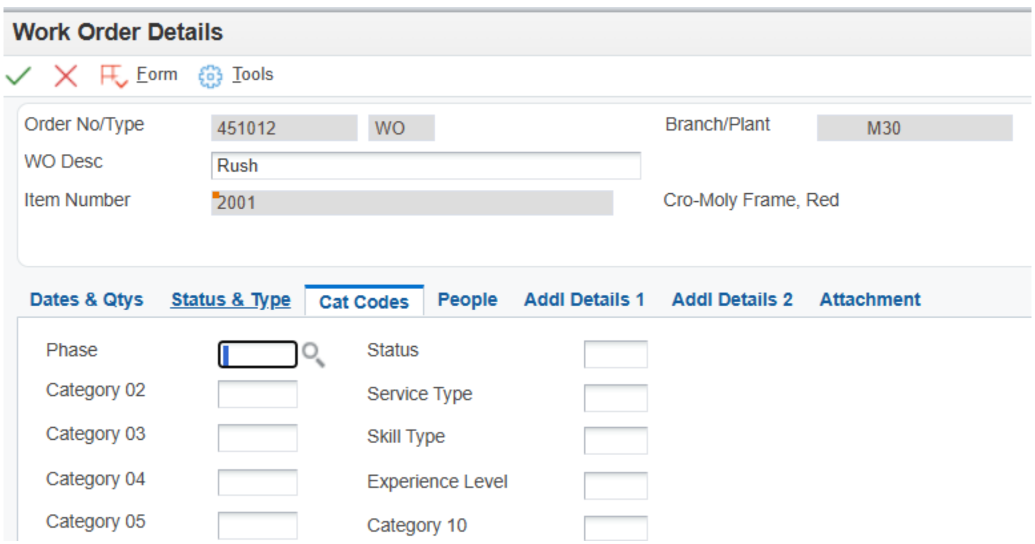


Examples of different tabs are given below


Work Order Details
Form
Tools
Order No/Type
451012
WO
Branch/Plant
M30
WO Desc
Rush
Item Number
2001
Cro-Moly Frame, Red
Dates & Qtys
Status & Type
Cat Codes
People
Addl Details 1
Addl Details 2
Attachment
Dates
Requested
06/23/2017
Planned Effective
06/23/2017
Start
06/13/2017
Work Order
05/08/2009
Completed
Quantities
Order/UOM
.10
EA
Secondary/UOM
Shipped
Canceled

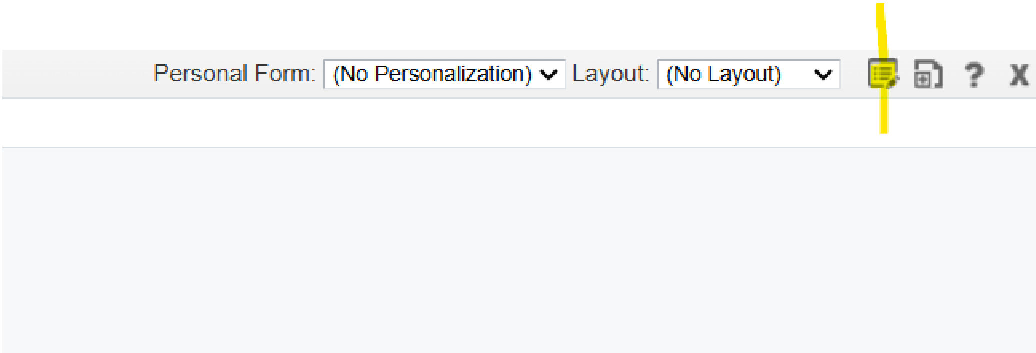

Work Order Details
Form
Tools
Order No/Type
451012
WO
Branch/Plant
M30
WO Desc
Rush
Item Number
2001
Cro-Moly Frame, Red
Dates & Qtys
Status & Type
Cat Codes
People
Addl Details 1
Addl Details 2
Attachment
Sts Comm.
Bill Type
M
Standard Manufacturing Bill
Rtg. Type
M
Standard Manufacturing Routing
Status
30
Paperwork Printed
Type
S
Shop Order
Freeze Code
N
Do not freeze the order.



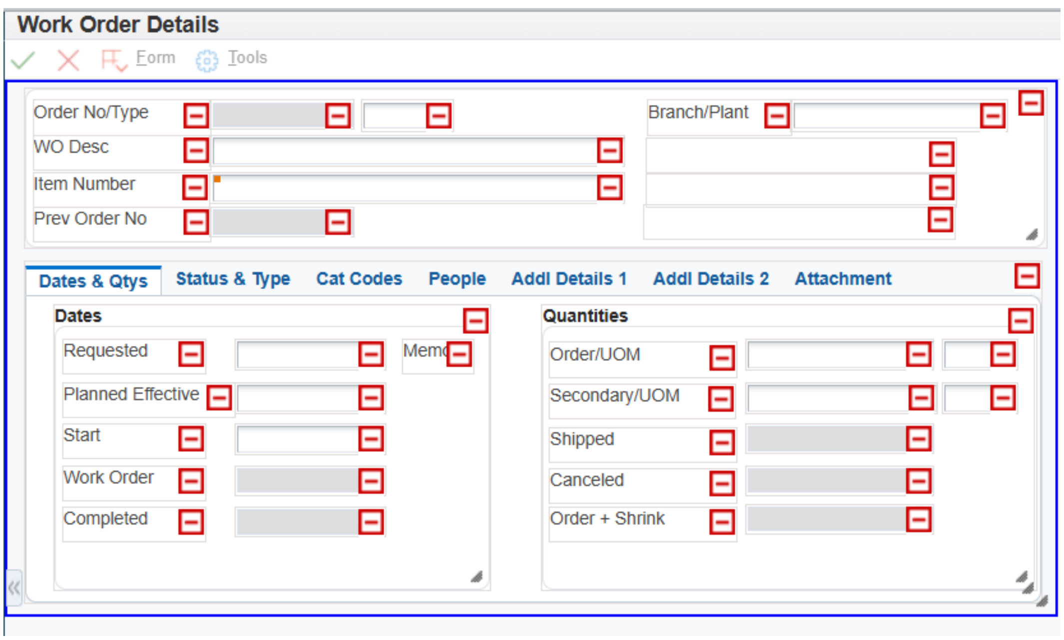


Step 2

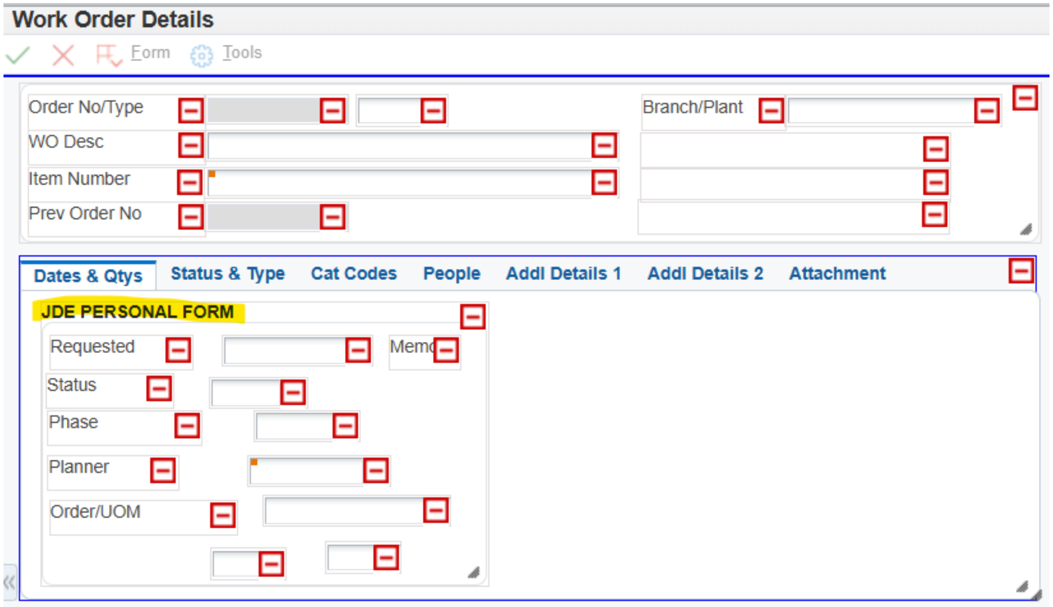
Invoke personal form icon on your top right (see below)



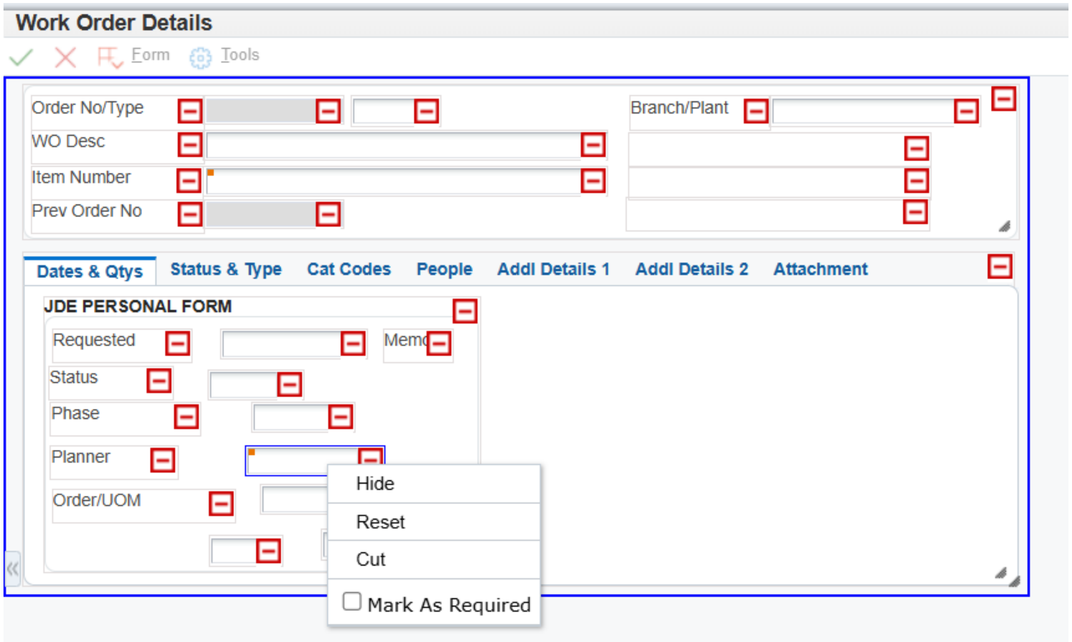
You can click on each field under each tab, to delete it OR cut & paste on another tab. You can realign the column for better view



You can override the tab name, if needed



You can right click on a field to know the options. Hide is better than delete so that you can restore back later if required instead of creating another new personal form. Click on mark as required if needed (which was not required previously in JDE regular vanilla)

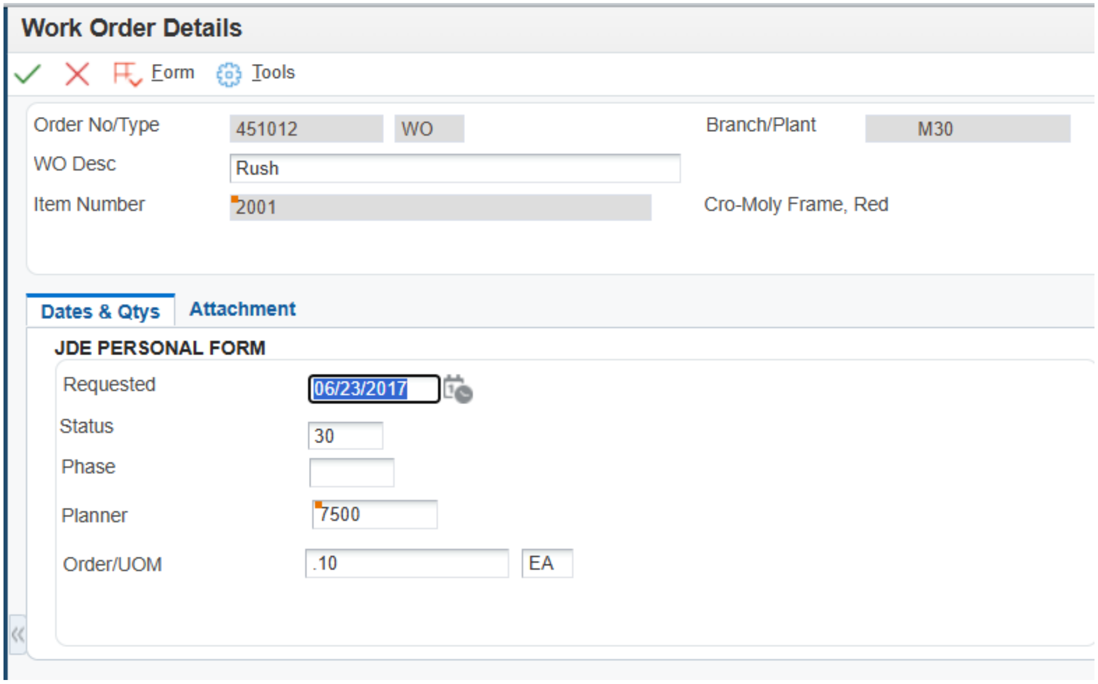


Step 3

Final view. Only required fields are grouped in the first tab. Other unused tabs are removed.

Save the composite with a unique yet clearly understandable name.

Ask IT for deployment and promotion to PD.


Work Order Details
Form
Tools
Order No/Type
451012
WO
Branch/Plant
M30
WO Desc
Rush
Item Number
2001
Cro-Moly Frame, Red
Dates & Qtys
Attachment
JDE PERSONAL FORM
Requested
06/23/2017
Status
30
Phase
Planner
7500
Order/UOM
.10
EA

Personal Form Purchase Order Entry

Business Requirement:

Purchase orders gets created from MRP workorder message processing activity. Most of the time purchase orders are entered manually for the stock, non-stock, services orders. And any changes to purchase order dates and quantities are made in P4310 application

This application has many tabs on the header and it takes time to tab through if you are processing multiple orders. Personal form consolidates all such required field into a single tab and you have the option of making any field as a required one in data entry.

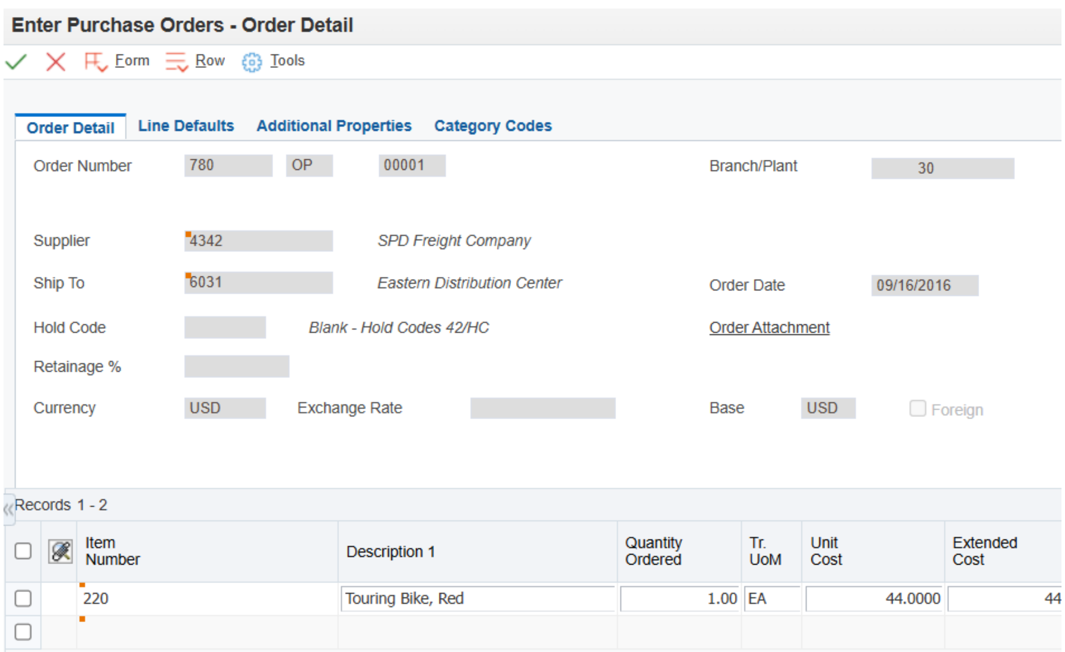
Technology used: Purchase Order Entry

Limitations: Adhere to your current role security and controls to create personal forms

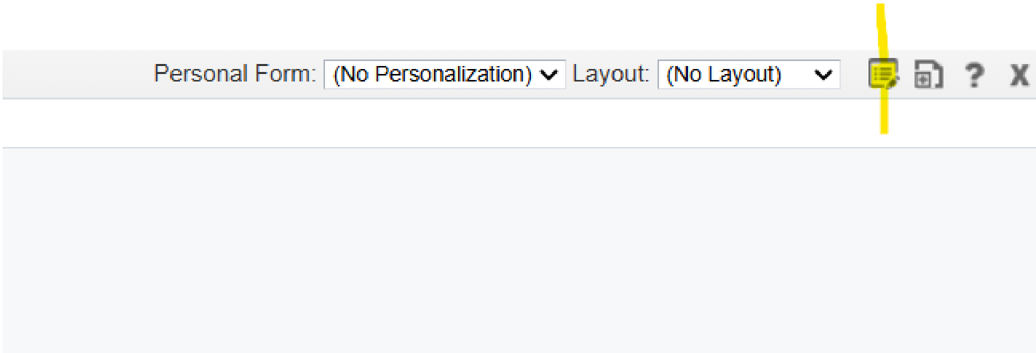
Table/Application Used: P4310

Step 1

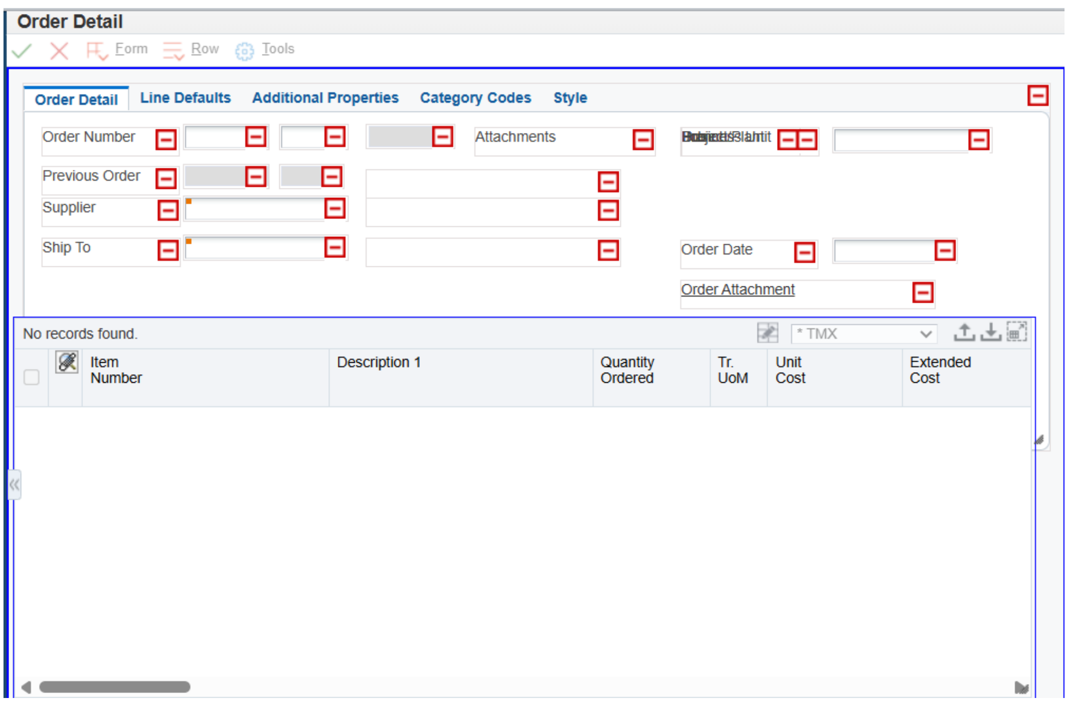
Open this application from your menu. If it does not exists, ask IT to deploy to your security role. You will be testing this in non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2 Invoke personal form icon on your top right (see below)



You can click on each field under each tab, to delete it OR cut & paste on another tab. You can realign the column for better view

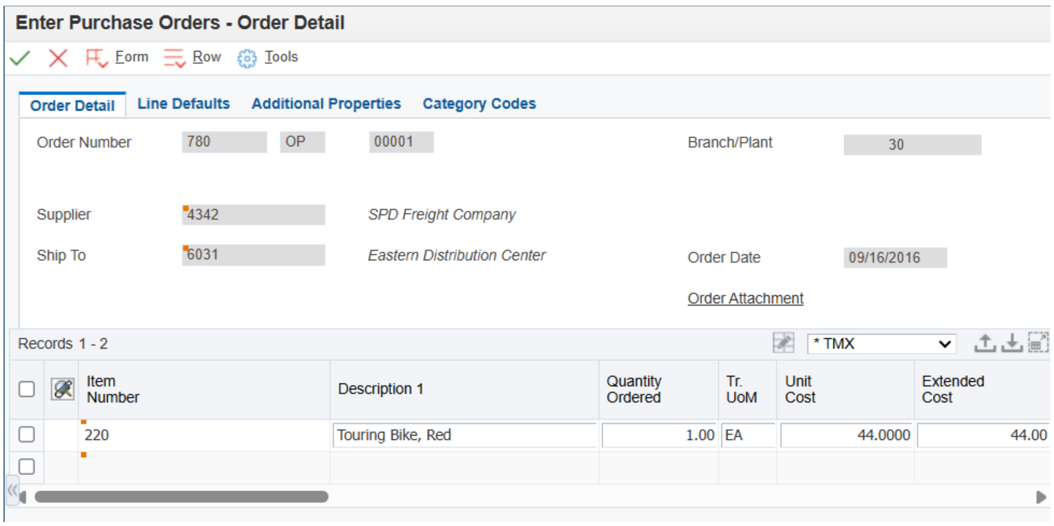


Step 2

Final view. Only required fields are grouped in header. Other unused tabs can be removed. You get more real estate on the header space.

Save the composite with a unique yet clearly understandable name.

Ask IT for deployment and promotion to PD.



Personal Form Sales Order Entry

Business Requirement:

Sales orders can come from EDI orders and mostly entered manually from the P4210 application. All changes to dates and quantities are processed in the same application

This application has many tabs on the header and it takes time to tab through if you are processing multiple orders. Personal form consolidates all such required field into a single tab and you have the option of making any field as a required one in data entry.

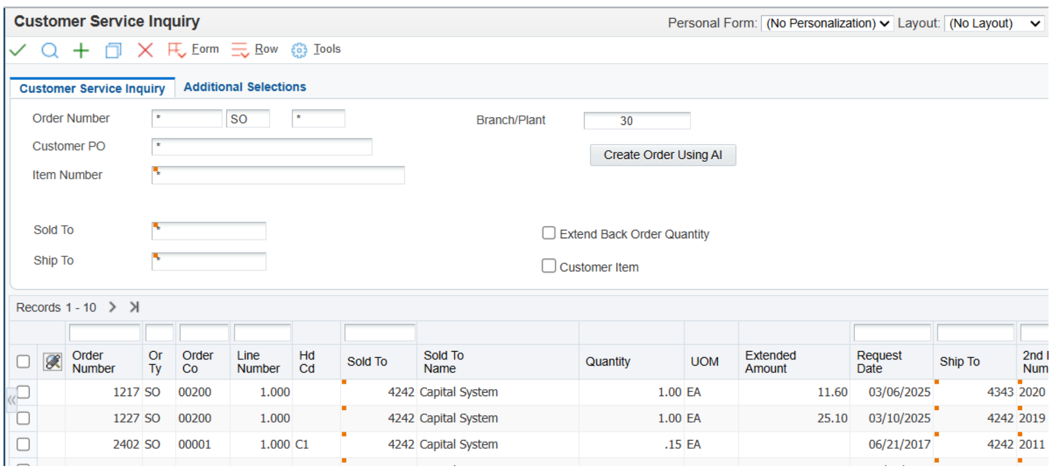
Technology used: Sales Order Entry

Limitations: Adhere to your current role security and controls to create personal forms

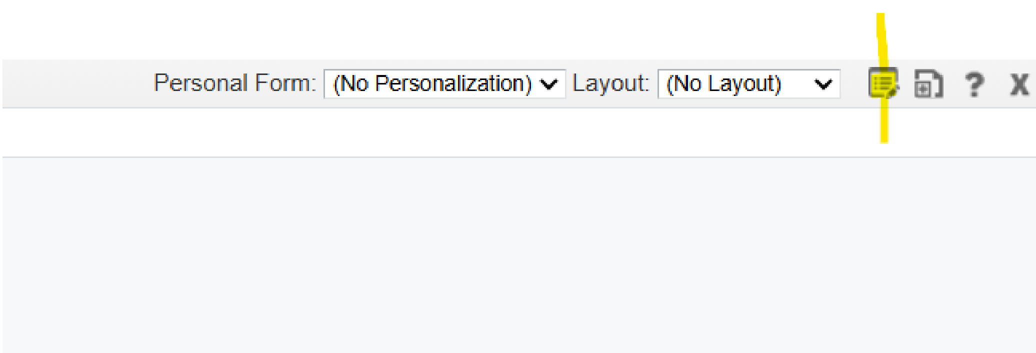
Table/Application Used: P4210

Step 1

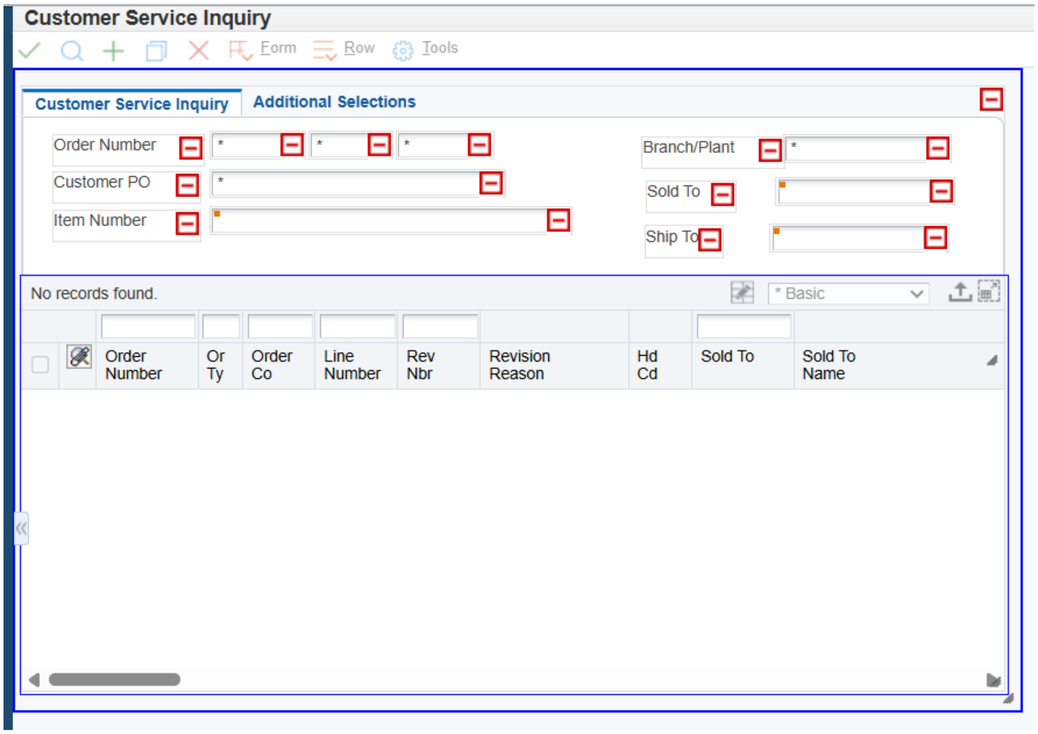
Open this application from your menu. If it does not exists, ask IT to deploy to your security role. You will be testing this in non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2 Invoke personal form icon on your top right (see below)



You can click on each field under each tab, to delete it OR cut & paste on another tab. You can realign the column for better view

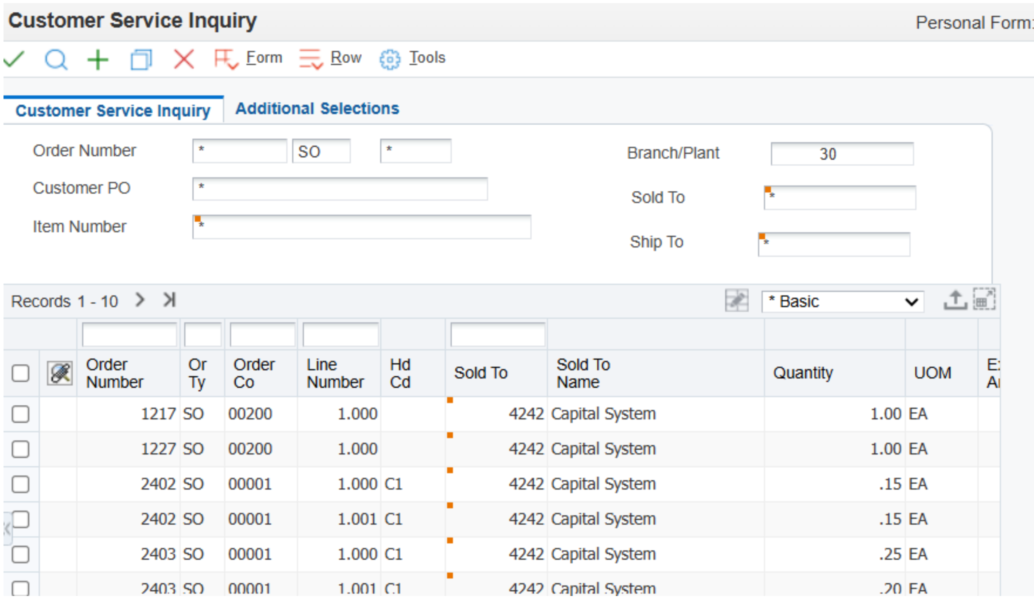


Step 3

Final view. Only required fields are grouped in header. Other unused tab(s) can be removed. You get more real estate on the header space.

Save the composite with a unique yet clearly understandable name.

Ask IT for deployment and promotion to PD.


Customer Service Inquiry
Personal Form:
Form
Row
Tools
Customer Service Inquiry
Additional Selections
Order Number
SO
Customer PO
Item Number
Branch/Plant
30
Sold To
Ship To
Records 1 - 10
* Basic
Order Number
Or Ty
Order Co
Line Number
Hd Cd
Sold To
Sold To Name
Quantity
UOM
1217 SO 00200 1.000 4242 Capital System 1.00 EA
1227 SO 00200 1.000 4242 Capital System 1.00 EA
2402 SO 00001 1.000 C1 4242 Capital System .15 EA
2402 SO 00001 1.001 C1 4242 Capital System .15 EA
2403 SO 00001 1.000 C1 4242 Capital System .25 EA
2403 SO 00001 1.001 C1 4242 Capital System .20 EA

Personal Form Address Book Revisions

Business Requirement:

Master data management group may be responsible from creating and maintaining address book records. Customer service or buyers may have limited access to make changes to their respective field values

This application has many tabs on the header and it takes time to tab through if you are processing multiple address book records. Personal form consolidates all such required field into a single tab and you have the option of making any field as a required one in data entry.

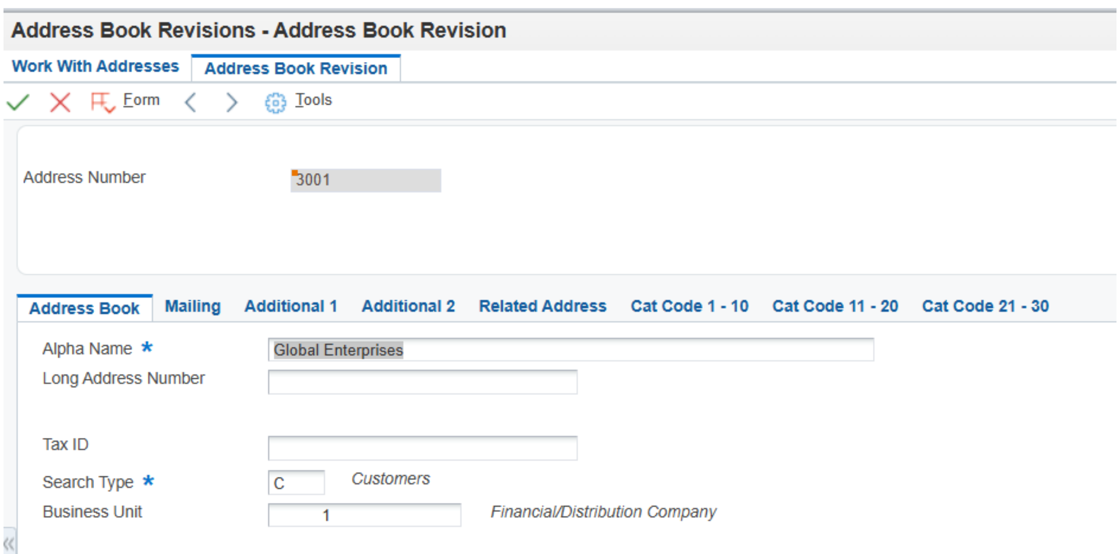
Technology used: Address Book Entry

Limitations: Adhere to your current role security and controls to create personal forms

Table/Application Used: P01013

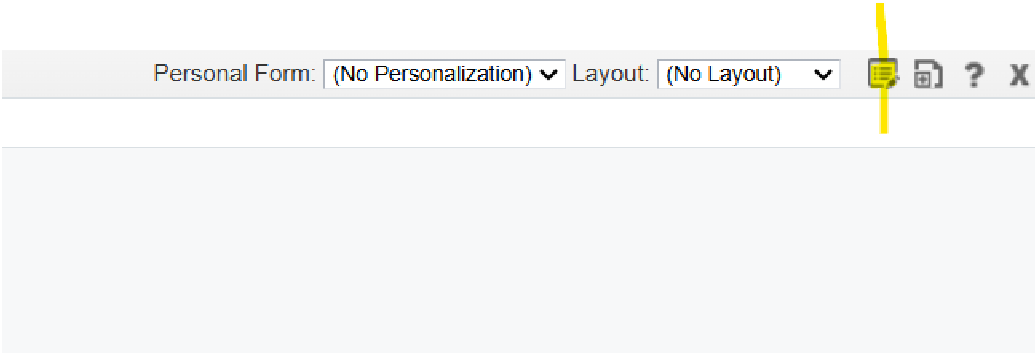
Step 1

Open this application from your menu. If it does not exists, ask IT to deploy to your security role. You will be testing this in non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists

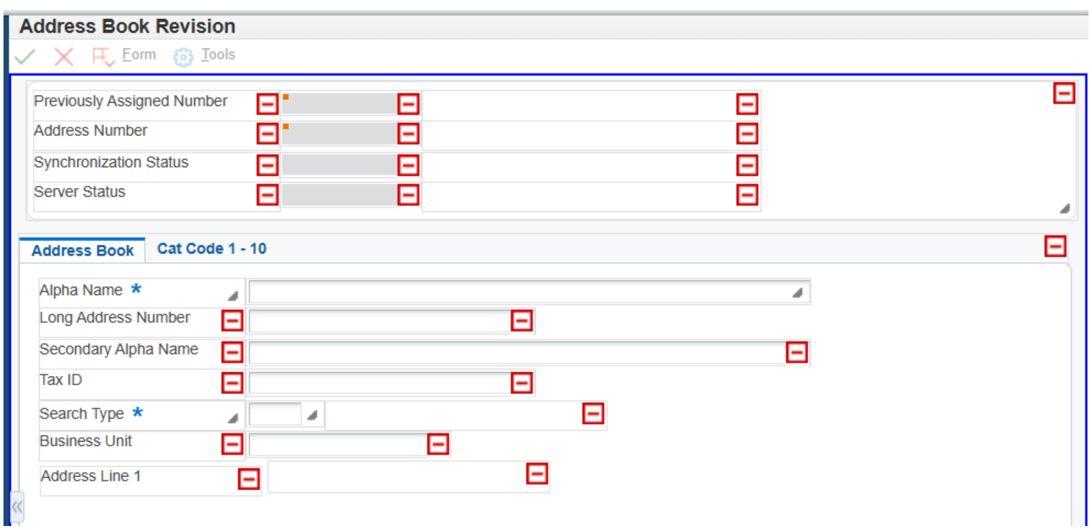


Step 2

Invoke personal form icon on your top right (see below)



You can click on each field under each tab, to delete it OR cut & paste on another tab. You can realign the column for better view. In this example multiple tabs are totally removed since they are not needed in this business.



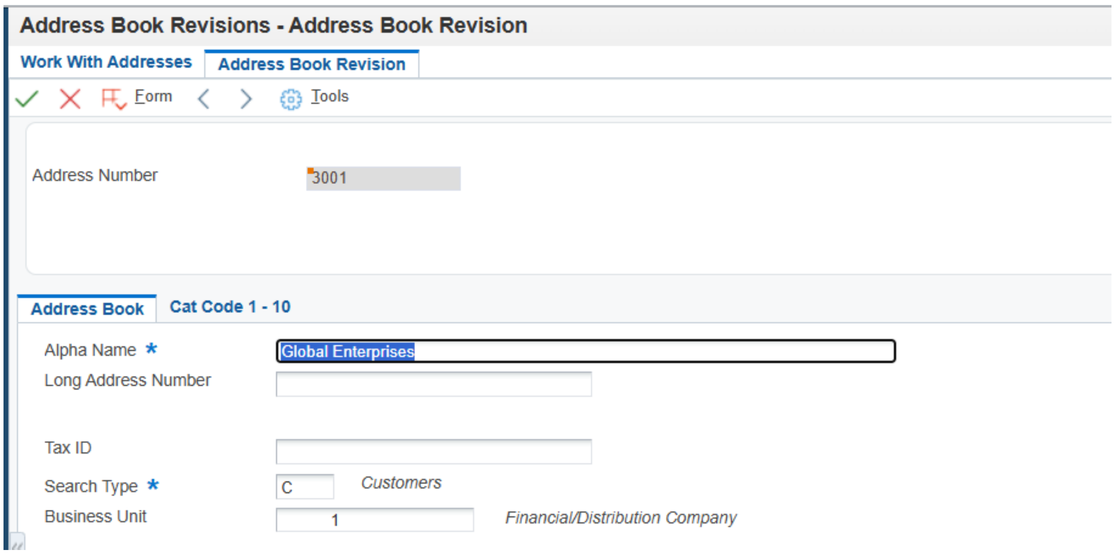
Step 2

Final view. Only required fields are grouped in header. Other unused tabs can be removed. You get more real estate on the header space.

Please test this activity. In demo instance the fields were not enable to cut and paste in different tabs.

Save the composite with a unique yet clearly understandable name.

Ask IT for deployment and promotion to PD.



BASIC STEPS SECTION

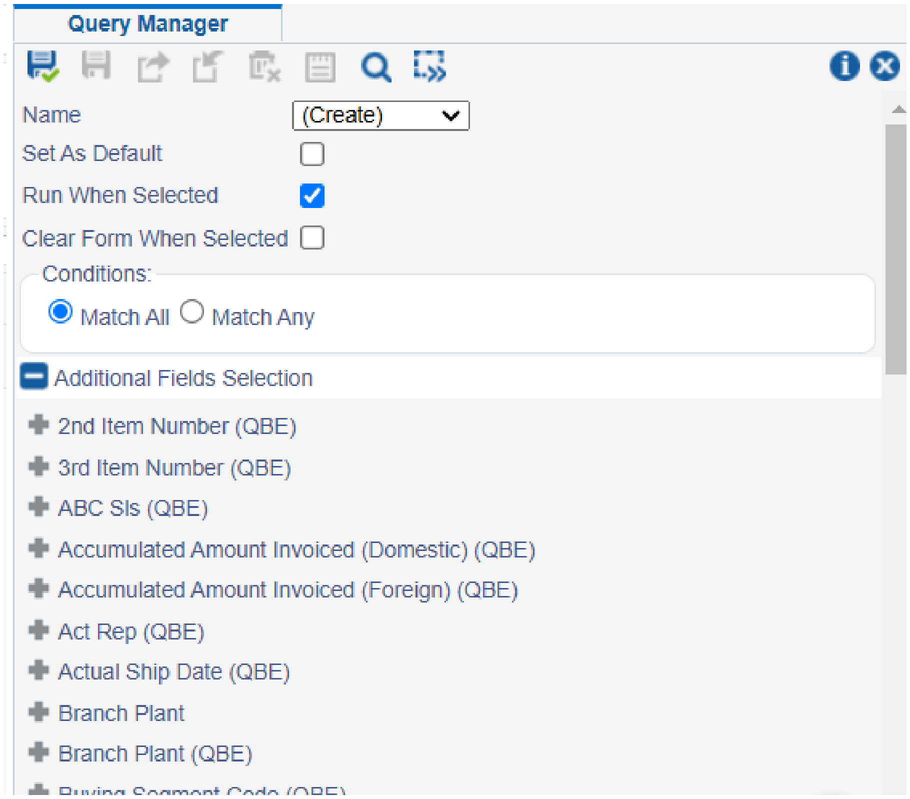
Watch List Creation - Basic Steps

Step 1

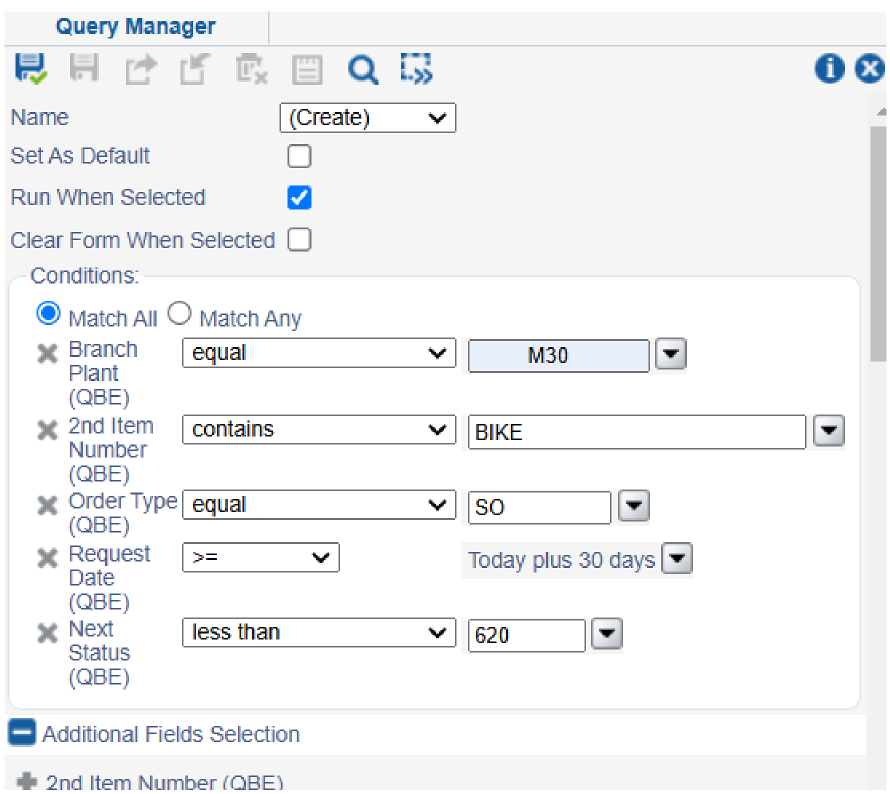
For every watchlist, you will create a query first. This is applicable across any JDE applications and databrowser tables Create a query with unique yet intelligent naming convention. This helps to pick and save the same watchlist later

Step 2

Always select run when selected option. Use set as default if this query is unique and you do not want to go the all records option. Do not select this option, unless needed for security purposes. Expand the additional fields selection (shown below)


Query Manager
Name
(Create)
Set As Default
Run When Selected
Clear Form When Selected
Conditions:
Match All
Match Any
Additional Fields Selection
2nd Item Number (QBE)
3rd Item Number (QBE)
ABC Sls (QBE)
Accumulated Amount Invoiced (Domestic) (QBE)
Accumulated Amount Invoiced (Foreign) (QBE)
Act Rep (QBE)
Actual Ship Date (QBE)
Branch Plant
Branch Plant (QBE)

Step 3


Query Manager
Name
(Create)
Set As Default
Run When Selected
Clear Form When Selected
Conditions:
Match All
Match Any
Branch Plant (QBE)
equal
M30
2nd Item Number (QBE)
contains
BIKE
Order Type (QBE)
equal
SO
Request Date (QBE)
>=
Today plus 30 days
Next Status (QBE)
less than
620
Additional Fields Selection

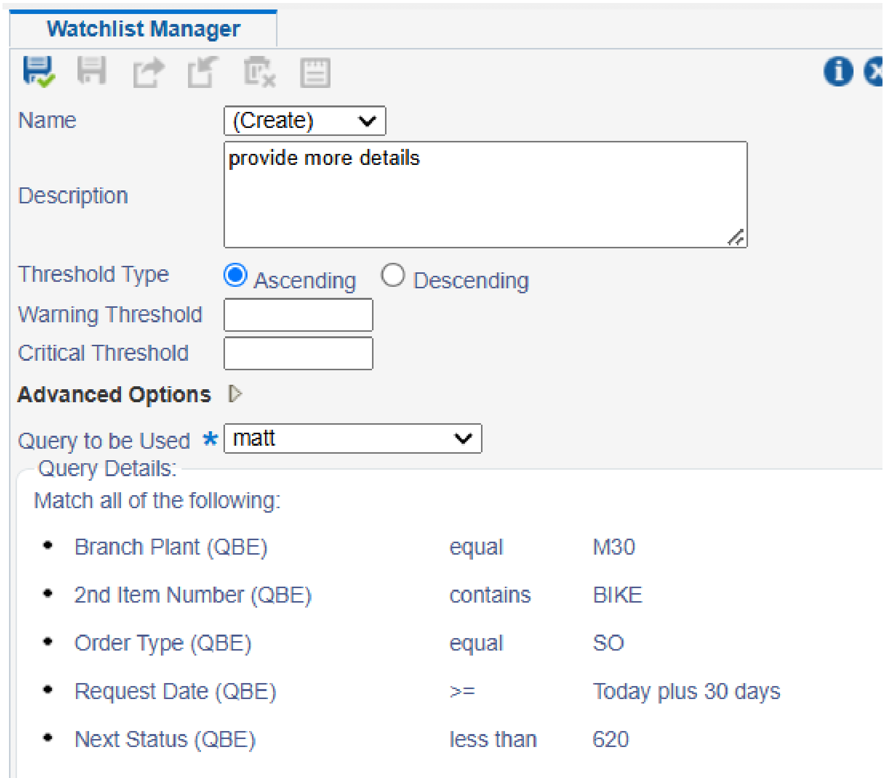
The above shows various fields selected with variety of rules. Branch plant could be one value or use second drop down to use multiple values. 2nd item is an example to filter out specific product; order type could be one or multiple values. Request date has many choices on the first drop down. On the second drop down you can choose today + or - certain days (plus 30 days shown above). It could be days, weeks, or months

Last one next status shows an example of <620 status.

Note, all above values are NOT required in any live watchlists. This above is a sample combination.

Step 4

After you create a watchlist, click the flag icon to create watchlist, if you are in the same window. JDE automatically takes the query on which you are working. Provide more description details and press save. JDE comes up with the same query value. You can override the name if you want, but it will provide confusion later when you want to modify the queries later.



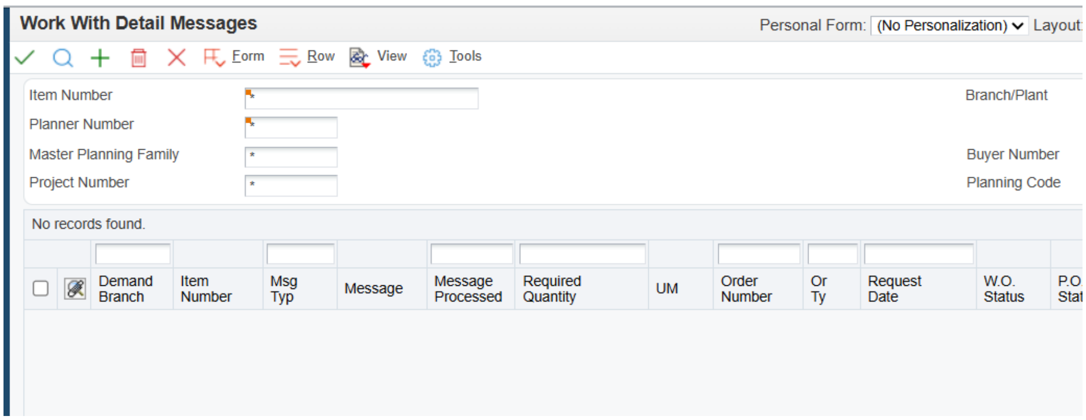
Cafe1 Creation - Basic Steps

Step 1

For every CAFE1 you will start with the base application. You will then add additional panes to the right either from the same application/different form (or) totally different application. You need to ensure you have security accessible to these applications.

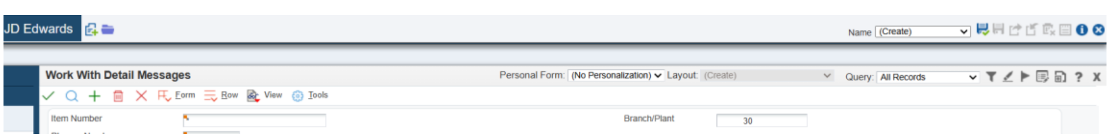
Step 2

Open the base application



Click edit form layout under your profile on the top right (where you manage your preferences, system profile, etc.). Screen shot now shown for this.

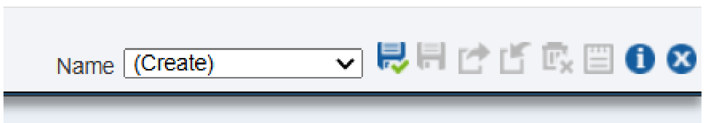
A new window tab opens on the top of your screen.



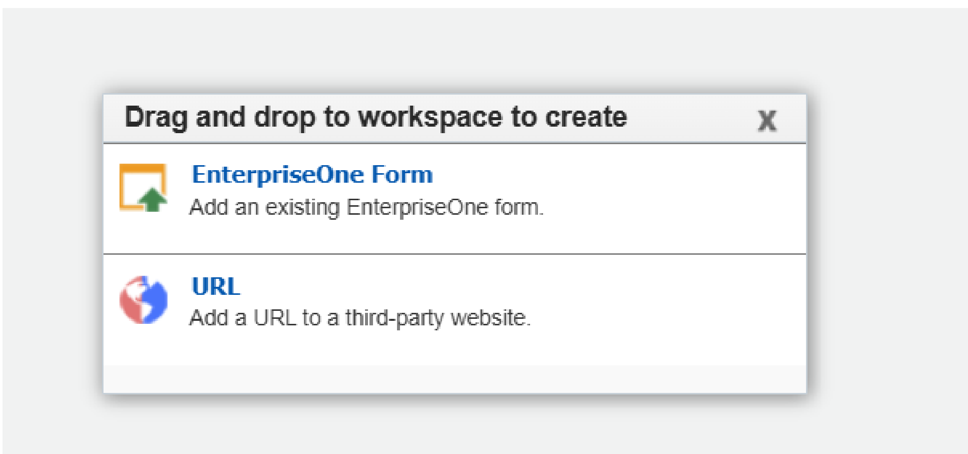
See below for bigger images

Left side pane for better clarity. Here you will click add and/or use folder to open. See below

Right side pane for better clarity. Here you will save the CAFE1 and/or revert changes. And close this application. See below



Click on the plus park on the left pane



You have click and drag the E1 form option to your right or bottom of the base application.

On this new window, you will provide the required details. Click on dynamic link.

More information provided on respective CAFE1 sections in the book.

You will save this screen and go back to the + option to add more screen to the bottom.

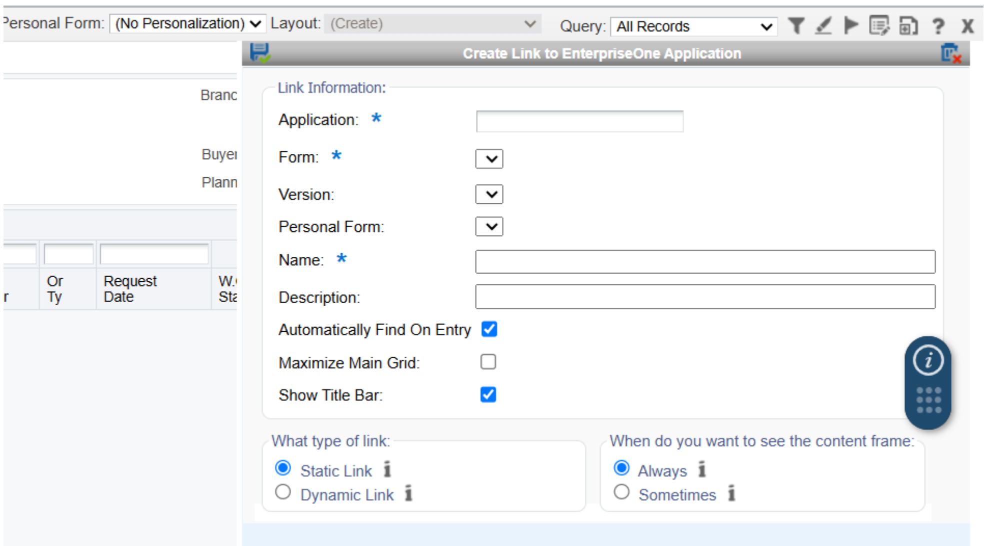
If you make mistakes, you can press delete or garbage can icon to start over.

If you need to edit your selection, information icon will show up once you safe. Click on the info icon, then edit icon will come up to enable you to edit your previous selections.

If the window does not get enabled in form, version, name, etc. field click static link and then click dynamic link.

Remember, windows are attached to each other and reading space comes down.

CAFE1 is very useful in bigger monitors and not necessarily in small screen laptops



Like any other UDOs, unique name is required. This require deployment and security profiles defined.

About the Author:

Mathur (matt) Ravikumar, an author, consultant, and political/economic cartoonist

Matt started his own consulting company in 2012 and provide functional consulting in enterprise resource planning business software applications.

He has self-published 30+ books over many years (including five books on Oracle's JD Edwards ERP software manufacturing applications).

He also publishes weekly cartoon content on political and economic news and events in YouTube Channel. Two of his Udemy lessons have been released, one on entrepreneurship and another on self-publishing. Four of self-published books have been released into audio format, available in audible and iTunes.

Regular meditator and trekked partially to Himalayas (Mount Kailash) towards a spiritual journey in 2016.

He is passionate about writing, especially on the subjects that can teach life's lessons. He like to mentor others and find their talent sitting dormant inside.

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LIST OF PUBLICATIONS

	About the Author - List of Publications	
	Technical Books	
1	Implementing Oracle JDE Orchestrator	March 31, 2026
2	Implementing Oracle JDE Project Case Studies	March 31, 2026
3	Implementing Oracle JDE UDOs	March 15, 2025
4	Implementing Oracle JDE Manufacturing Tip & Tricks	May 28, 2018
5	Implementing Oracle JDE Manufacturing	July 20, 2017

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