



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 In the meantime, end users are still working on stale reports and out of date data analytics.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			
#	Areas	Activity	App/Table
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
17		ST/OT Backorder Aging Alert	P43264
18		Customer \$ performance, Aging Alert	P03B2022
19		Re-Order Point Alert	P43011
20		Purchase Approvals Pending Alert	P43081

21	Manufactuing	Work Order Operations Delayed Alert	P31226
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

38	Orchestrator	New Non-stock Item Creation	F4101
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
44		Sales Order Acknowledgement Message	P4211
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 Acknowledgement 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

Home > Notifications > Notifications > untitled

☰

Name: NOTY_MR260314_CREDITCLEARED

Description: NOTY_MR260314_CREDITCLEARED

Type: **Watchlist** Run As Subscriber Allow Subscriber Overrides  Test

▶ Notification Inputs

▲ Watchlist

🔍 Select **Watchlist** MR260314

CREDIT HOLDS



▶ Rule

My Subscriptions

+ Add Subscription

Close

Show Search

-  **NOTF_MR260308_WATCHLISTNOTIFY**
NOTF_MR260308_WATCHLISTNOTIFY
-  **NOTY_MR260314_CREDITCLEARED**
NOTY_MR260314_CREDITCLEARED

Configuration

Notification Name: NOTY_MR260314_CREDITCLEARED

Notification Description: NOTY_MR260314_CREDITCLEARED

Subscription Name:

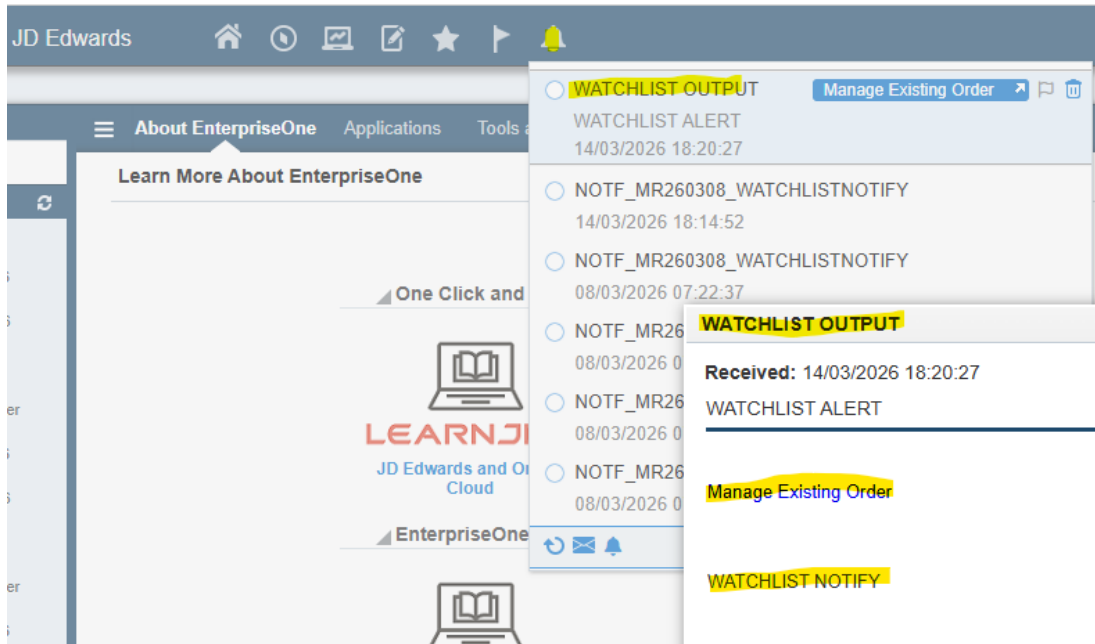
Message Heading:

Delivery Methods:

- Notification List Category:
- Work Center
- Email

Inputs

Policy



The screenshot shows the JD Edwards notification center interface. The top navigation bar includes 'JD Edwards' and various utility icons. The main content area displays a list of notifications:

- WATCHLIST OUTPUT** (highlighted in yellow) - Manage Existing Order - 14/03/2026 18:20:27
- WATCHLIST ALERT - 14/03/2026 18:20:27
- NOTF_MR260308_WATCHLISTNOTIFY - 14/03/2026 18:14:52
- NOTF_MR260308_WATCHLISTNOTIFY - 08/03/2026 07:22:37
- NOTF_MR26... (highlighted in yellow) - 08/03/2026 0...
- NOTF_MR26... - 08/03/2026 0...
- NOTF_MR26... - 08/03/2026 0...
- NOTF_MR26... - 08/03/2026 0...

A detailed view of the highlighted 'WATCHLIST OUTPUT' notification is shown in a pop-up window, containing the following information:

- WATCHLIST OUTPUT** (highlighted in yellow)
- Received: 14/03/2026 18:20:27
- WATCHLIST ALERT
- Manage Existing Order** (highlighted in yellow)
- WATCHLIST NOTIFY** (highlighted in yellow)

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

Data Browser - F4209 [Held Orders] Query: All Records

Tools

Hd Cd = *
Or Ty = *
Order Number = *
Order Co = *
Ord Suf = *
Line Number = *
Distribution Line Number = *
Released Date = *
Released Time = *
App Sts = *
Person Responsible = *

Records 1 - 1

	C1		M30				
<input type="checkbox"/>	Hd Cd	Person Responsible	Address Number	Business Unit	Order Co	Order Number	Or Ty
<input type="checkbox"/>	C1		8446	4242	M30 00200		2809 SO

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)

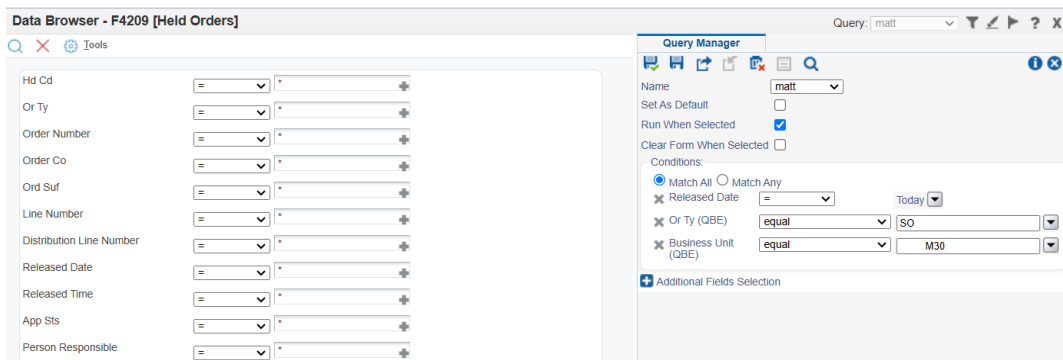
You can go creative with using =, <=, etc. on the release date value and use the option of today or <=7 days based on your business needs.

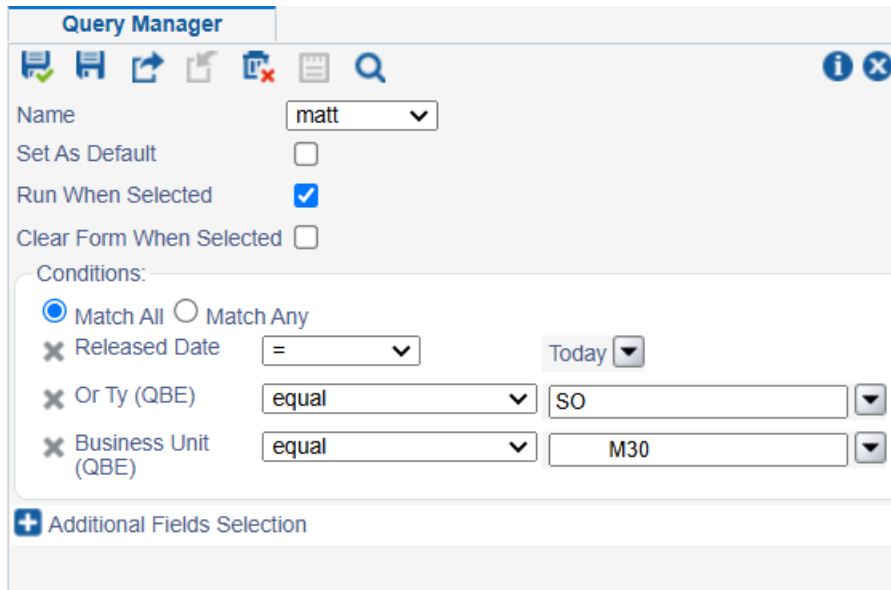
Use your popular sales order type in Or Ty field. In this example we want to know what credit hold (example C1) are released today.

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)

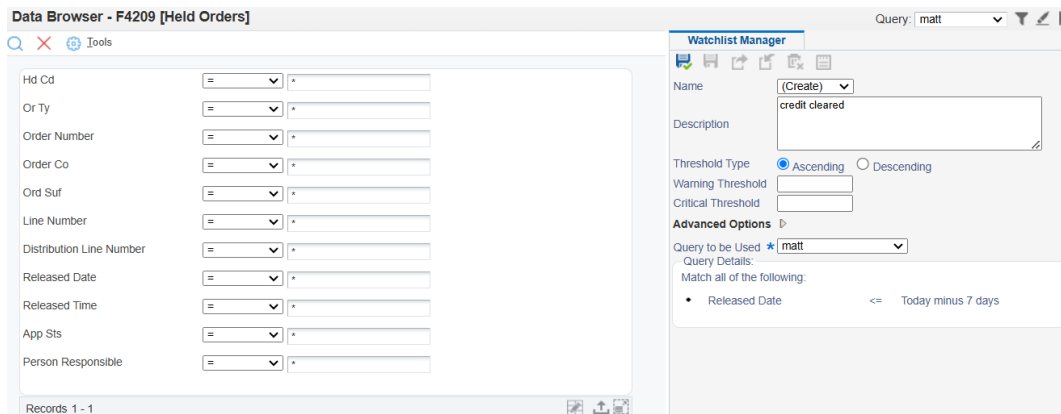
When you save the query (in this example below: matt), it will automatically show up in the personal queries option in the databrowser. No need to input table, environment details once again.





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



Watchlist Manager

Name: (Create) ▾

Description:

Threshold Type: Ascending Descending

Warning Threshold:

Critical Threshold:

Advanced Options ▾

Query to be Used * ▾

Query Details:

Match all of the following:

- Released Date = Today
- Or Ty (QBE) equal SO
- Business Unit (QBE) equal M30

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 exist, 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

The screenshot shows the 'One View Open Sales Inquiry' application interface. The main window displays a table with two records. The table has columns for Order Number, Order Type, Order Company, Line Type, Line Number, Sold To Number, and Sold To Name. The records are:

Order Number	Order Type	Order Company	Line Type	Line Number	Sold To Number	Sold To Name
1216	SO	00200	S	1.000	4242	Capital System
1216	SO	00200	S	2.000	4242	Capital System

Overlaid on the right side of the application is a Chrome browser window showing the 'About' dialog box for the application. The dialog box contains the following information:

About

Application Information

Application: P42270
Version: ZJDE0001

Form Information

Form: W42270A
SubForms: None
Help Identifier: 245326330
Product Code: 42B
Form Process Type: BR
Mode: 1
Generated by:

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.

Order Number	Order Type	Line Type	Line Number	Sold To Number	Sold To Name	Branch Plant	Item Number	Item Description	Last Status	Next Status	Order Date	Request Date	Quantity Ordered	Unit Price	Extended Price
1216 SO	S		1.000	4242	Capital System	M30	221	Touring Bike, Blue	980		03/06/2025	03/06/2025	100.00	.0000	
1216 SO	S		2.000	4242	Capital System	M30	220	Touring Bike, Red	980		03/06/2025	03/06/2025	10.00	.0000	

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

Query Manager

Name: (Create)

Set As Default:

Run When Selected:

Clear Form When Selected:

Conditions:

- Match All / Match Any
- Branch Plant (QBE) equal M30
- Order Type (QBE) equal SO
- Last Status (QBE) equal 980
- Request Date (QBE) > 03/01/2025

Additional Fields Selection

Query Manager

Name:

Set As Default:

Run When Selected:

Clear Form When Selected:

Conditions:

Match All Match Any

Branch Plant (QBE) equal M30

Order Type (QBE) equal SO

Request Date (QBE) >= Today plus 30 days

Status Code - Next From less than or equal to 580

+ Additional Fields Selection

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

One View Open Sales Inquiry - One View Open Sales Inquiry

Personal Form: (No Personalization) | Layout: (No Layout) | Query: matt-blog

Order Company: | Order Type: | Status Code - Next From: Thru:

Branch Plant: M30 Eastern Manufacturing Center | As If Currency Code:

Item Number:

Records 1 - 2

Order Number	Order Type	Line Type	Line Number	Sold To Number	Sold To Name	Branch Plant	Item Number	Item Description	List Status	Next Status	Order Date
1216	SO	S	1,000	4242	Capital System	M30	221	Touring Bike, Blue	980		03/06/202
1216	SO	S	2,000	4242	Capital System	M30	220	Touring Bike, Red	980		03/06/202

Watchlist Manager

Name: (Create)

Description: backlog give more detailed description for future reference

Threshold Type: Ascending Descending

Warning Threshold:

Critical Threshold:

Advanced Options

Query to be Used: matt-blog

Query Details

Match all of the following:

- Branch Plant (QBE) equal M30
- Order Type (QBE) equal SO
- Last Status (QBE) equal 980
- Request Date (QBE) > 03/01/2025

The screenshot shows the 'Watchlist Manager' window with the following configuration:

- Name:** (Create) [dropdown]
- Description:** [empty text box]
- Threshold Type:** Ascending Descending
- Warning Threshold:** [empty text box]
- Critical Threshold:** [empty text box]
- Advanced Options:** [expanded]
- Query to be Used:** * matt-blog [dropdown]
- Query Details:** Match all of the following:

• Branch Plant (QBE)	equal	M30
• Order Type (QBE)	equal	SO
• Request Date (QBE)	>=	Today plus 30 days
• Status Code - Next From	less than or equal to	580

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 onview 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 be 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 proactively 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.

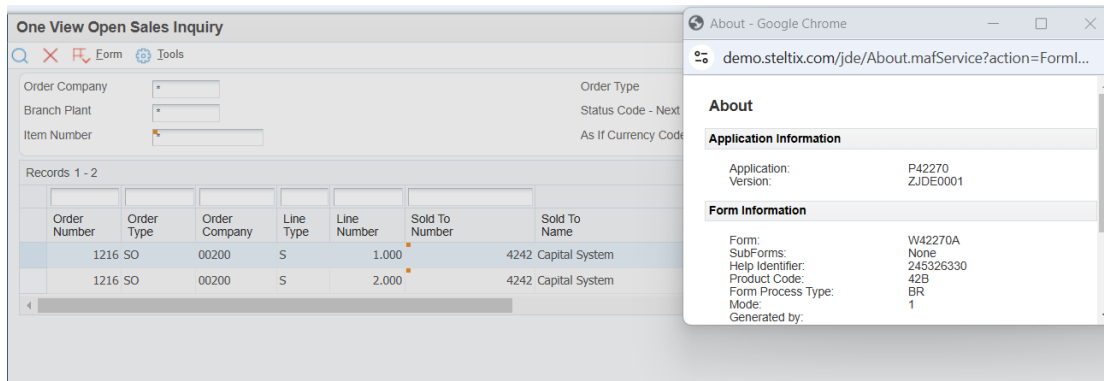
Technology used: One View Inquiry

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 exist, 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 Open Sales Inquiry - One View Open Sales Inquiry Personal Form: (No Personalization) Layout: (No Layout) Query: All Records

Order Company: [] Order Type: []
Branch Plant: M30 Eastern Manufacturing Center Status Code - Next From: [] Thru: []
Item Number: [] As If Currency Code: []

Records 1 - 2

Order Number	Order Type	Line Type	Line Number	Sold To Number	Sold To Name	Branch Plant	Item Number	Item Description	Last Status	Next Status	Order Date	Request Date	Quantity Ordered	Unit Price	Extended Price
1216	SO	S	1,000	4242	Capital System	M30 221		Touring Bike, Blue	980		03/06/2025	03/06/2025	100.00	.0000	
1216	SO	S	2,000	4242	Capital System	M30 220		Touring Bike, Red	980		03/06/2025	03/06/2025	10.00	.0000	

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

One View Open Sales Inquiry Personal Form: (No Personalization) Layout: (No Layout) Query: matt-future

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

No records found.

Order Number	Order Type	Order Company	Line Type	Line Number	Sold To Number	Sold To Name	Branch Plant	Branch Plant Description
--------------	------------	---------------	-----------	-------------	----------------	--------------	--------------	--------------------------

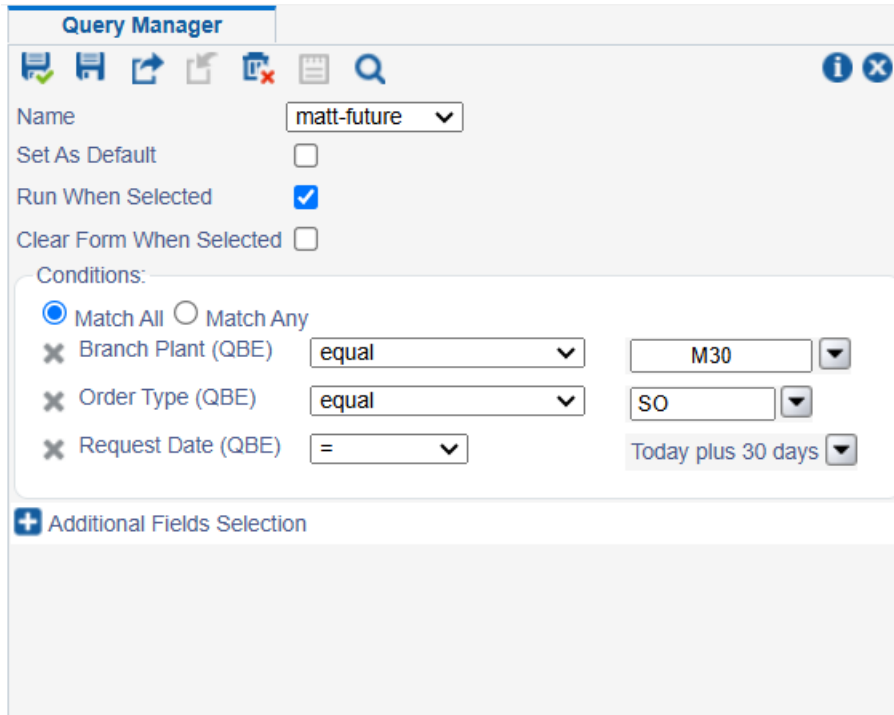
Query Manager

Name: matt-future
Set As Default: []
Run When Selected: [x]
Clear Form When Selected: []

Conditions:

- Match All [x] Match Any []
- Branch Plant (QBE) equal M30
- Order Type (QBE) equal SO
- Request Date (QBE) = Today plus 30 days

Additional Fields Selection



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

The screenshot shows the 'Watchlist Manager' window with the following configuration:

- Name:** (Create) (dropdown)
- Description:** PROVIDE MORE DETAILS FOR EASY OF USE LATER (text area)
- Threshold Type:** Ascending Descending
- Warning Threshold:** (empty text box)
- Critical Threshold:** (empty text box)
- Advanced Options:** (expanded)
- Query to be Used:** * matt-future (dropdown)
- Query Details:** Match all of the following:

• Branch Plant (QBE)	equal	M30
• Order Type (QBE)	equal	SO
• Request Date (QBE)	=	Today plus 30 days

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 onview 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 be 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

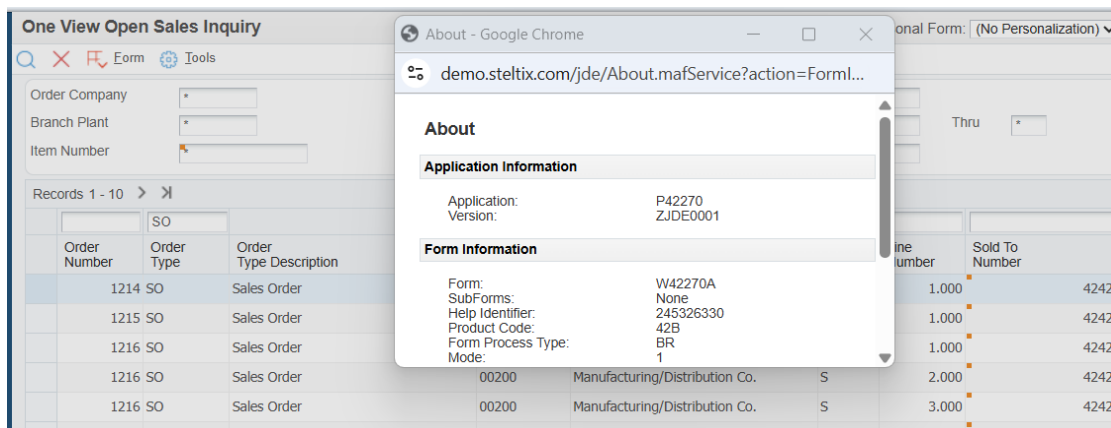
Limitations: We are using One View standard inquiry which may not have all the hundreds of sales order header/details fields.

But it serves the watchlist purposes.

Table/Application Used: P42270

Step 1

Open this application from your menu. If it does not exist, 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 Open Sales Inquiry Personal Form: (No Personalization) Layout:

Form Tools

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

Records 1 - 10 > X

Order Number	SO	Order Company	Line Type	Line Number	Sold To Number	Sold To Name	Branch Plant	Request Date	Branch Plant De
1214	SO	00200	S	1.000	4242	Capital System	M30	03/05/2025	Eastern M
1215	SO	00200	S	1.000	4242	Capital System	M30	03/06/2025	Eastern M
1216	SO	00200	S	1.000	4242	Capital System	M30	03/06/2025	Eastern M
1216	SO	00200	S	2.000	4242	Capital System	M30	03/06/2025	Eastern M
1216	SO	00200	S	3.000	4242	Capital System	M30	03/06/2025	Eastern M
1216	SO	00200	S	3.001	4242	Capital System	M30	03/06/2025	Eastern M
1216	SO	00200	S	3.101	4242	Capital System	M30	03/06/2025	Eastern M

Step 3

Create a new query. Use the right pane selections to start with.

Branch plant, order type, request date \leq today minus 30 days (as example). And where actual ship date is blank. Save the query with a unique understandable name

One View Open Sales Inquiry Personal Form: (No Personalization) Layout: (No Layout) Query: All Records

Form Tools

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

Records 1 - 10 > X

Order Number	SO	Order Company	Line Type	Line Number	Sold To Number	Sold To Name	Branch Plant	Request Date
1214	SO	00200	S	1.000	4242	Capital System	M30	03/05/202
1215	SO	00200	S	1.000	4242	Capital System	M30	03/06/202
1216	SO	00200	S	1.000	4242	Capital System	M30	03/06/202

Query Manager

Name: (Create)

Set As Default:
Run When Selected:
Clear Form When Selected:

Conditions:

Match All Match Any

- Branch Plant (QBE) equal M30
- Order Type (QBE) equal SO
- Request Date (QBE) \leq Today minus 30 days
- Actual Ship Date (QBE) is blank

Query Manager

Name (Create) v

Set As Default

Run When Selected

Clear Form When Selected

Conditions:

Match All Match Any

Branch Plant (QBE) equal M30 v

Order Type (QBE) equal SO v

Request Date (QBE) <= Today minus 30 days v

Actual Ship Date (QBE) is blank v

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

Watchlist Manager

Name (Create) v

Description PROVIDE MORE DETAILS FOR EASY OF USE LATER

Threshold Type Ascending Descending

Warning Threshold

Critical Threshold

Advanced Options ▾

Query to be Used * matt-future v

Query Details:

Match all of the following:

- Branch Plant (QBE) equal M30
- Order Type (QBE) equal SO
- Request Date (QBE) = Today plus 30 days

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 be 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.

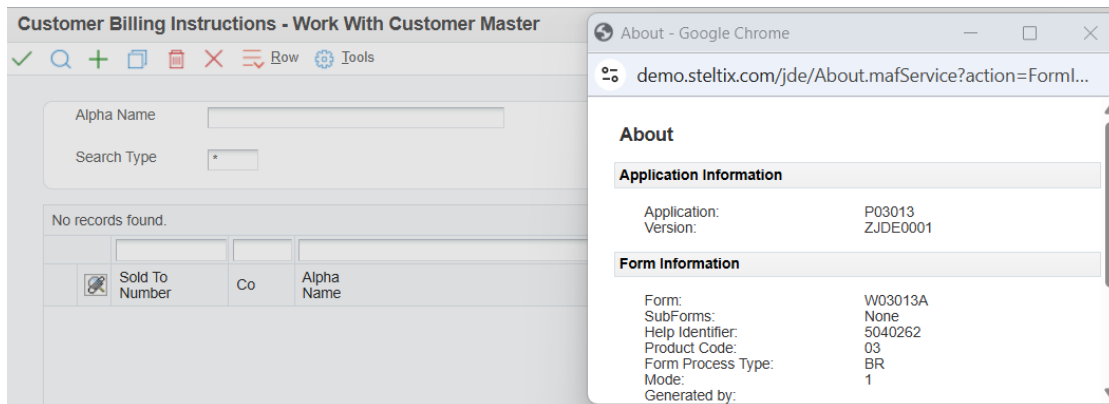
Technology used: Customer Master

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 exist, 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

Customer Billing Instructions - Work With Customer Master Personal Form: (No Personalization) Layout: (N)

Alpha Name Display Phone Number
Search Type Display Address

Records 1 - 9

	Sold To Number	Co	Alpha Name	C M	Long Address	Industry Class	Sch Typ	Tax ID
<input checked="" type="radio"/>	3004	00000	Pacific Company, The			7000	C	
<input type="radio"/>	3335	00000	PeopleNet, Inc.				C	
<input type="radio"/>	3555	00000	Pro Bike Shop			5200	C	
<input type="radio"/>	4202	00000	Palisade Inc.			5000	C	

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

Customer Billing Instructions - Work With Customer Master Personal Form: (No Personalization) Layout: (No Layout) Query: All Records

Alpha Name Display Phone Number
Search Type Display Address

Records 1 - 1

	Sold To Number	Co	Alpha Name	C M	Long Address	Industry Class	Sch Typ	Tax ID	Individual Tax ID	Pallet Control	Backorders Allowed (Y/N)	Partial Line Shipments Allowed (Y/N)	Partial Order Shipments Allowed (Y/N)
<input checked="" type="radio"/>	4243	00000	Custom Brokers			6000	C				Y	N	N

Closer view of the grid extension fields.

Show All Columns ▾				
				N
	Pallet Control	Backorders Allowed (Y/N)	Partial Line Shipments Allowed (Y/N)	Partial Order Shipments Allowed (Y/N)
		Y	N	N

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

Customer Billing Instructions - Work With Customer Master

Personal Form: (No Personalization) | Layout: (No Layout) | Query: All Records

Alpha Name: Display Phone Number
 Search Type: Display Address

Records 1 - 1

Sold To Number	Co	Alpha Name	C	Long Address	Industry Class	Sch Typ	Tax ID	Individual Tax ID	Pallet Control	Backord Allowed
4243 00000	Custom Brokers	6000	C			C			Y	

Query Manager

Name: (Create)

Set As Default:
 Run When Selected:
 Clear Form When Selected:

Conditions:

- Match All Match Any
- Sch Typ (QBE) equal C
- Partial Order Shipments Allowed (Y/N) (QBE) equal N

Additional Fields Selection

- Alpha Name (QBE)

The screenshot shows the 'Query Manager' window with the following configuration:

- Name: (Create)
- Set As Default:
- Run When Selected:
- Clear Form When Selected:
- Conditions:
 - Match All (selected) / Match Any
 - Sch Typ (QBE): equal, C
 - Partial Order Shipments Allowed (Y/N) (QBE): equal, N
- Additional Fields Selection:
 - Alpha Name (QBE)
 - Backorders Allowed (Y/N) (QBE)
 - C M (QBE)
 - C o (QBE)

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

Watchlist Manager

Name: (Create) ▾

Description: explain your query for other teams and for Audits

Threshold Type: Ascending Descending

Warning Threshold:

Critical Threshold:

Advanced Options ▾

Query to be Used * test ▾

Query Details:

Match all of the following:

- Sch Typ (QBE) equal C
- Partial Order Shipments Allowed (Y/N) (QBE) equal N

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 onview 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.

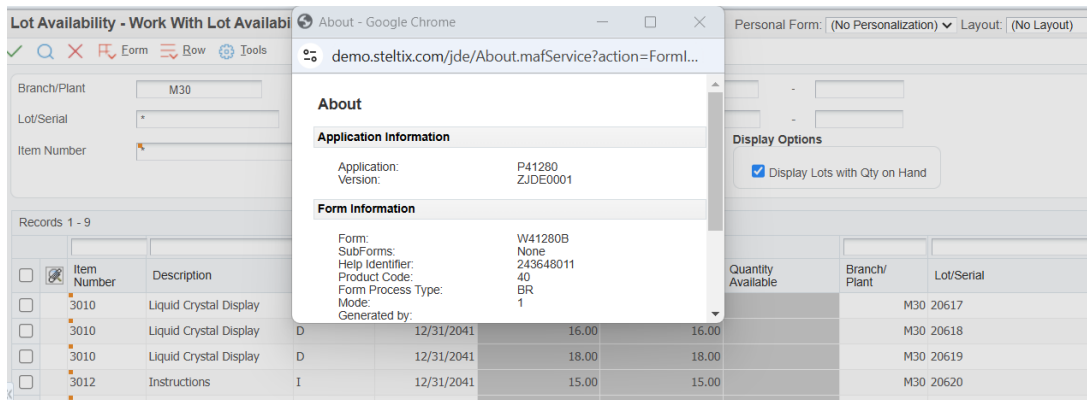
Technology used: UDO watchlist.

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.

Lot Availability - Work With Lot Availability Personal Form: (No Personalization) Layout: (No Layout)

Branch/Plant: M30 Grade: Potency: Display Options: Display Lots with Qty on Hand

Records 1 - 9

Item Number	Description	Lot Status	Expiration Date	Quantity On Hand	Quantity Held	Quantity Available	Branch/Plant	Lot/Serial
3010	Liquid Crystal Display	D	12/31/2041	15.00	15.00		M30	20617
3010	Liquid Crystal Display	D	12/31/2041	16.00	16.00		M30	20618
3010	Liquid Crystal Display	D	12/31/2041	18.00	18.00		M30	20619

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.

Query Manager

Name: (Create)

Set As Default:

Run When Selected:

Clear Form When Selected:

Conditions:

Match All Match Any

Branch/ Plant (QBE) equal

Lot Status (QBE) greater than

Additional Fields Selection

- 3rd Item Number (QBE)
- Branch/ Plant (QBE)
- Branch/Plant
- Description (QBE)
- G/L Category (wf) (QBE)

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

The screenshot displays the 'One View Inventory Valuation Analysis Inquiry' application interface. The main window shows a table with the following data:

Branch Plant	Branch Plant Description	Description	Location	Lot Serial Number	Quantity On Hand
M30	M30 Eastern Manufacturing Center	Paint, Red		200506010002	7500.00-
	M30 Eastern Manufacturing Center	Primer			7450.00-
	M30 Eastern Manufacturing Center	Inline Dryer Filter			.02-
	M30 Eastern Manufacturing Center	Logic Board			.10-
	M30 Eastern Manufacturing Center	Battery			.10-
	M30 Eastern Manufacturing Center	Case			.10-
	M30 Eastern Manufacturing Center	8954234			.22-

An 'About' dialog box is open in the foreground, displaying the following information:

About

Application Information

Application: P41271
Version: ZJDE0001

Form Information

Form: W41271A
SubForms: None
Help Identifier: 243646750
Product Code: 41
Form Process Type: BR
Mode: 1
Generated by:

Step 2

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

One View Inventory Valuation Analysis Inquiry - One View Inventory Valuation Analysis Inquiry Personal Form: (No Personalization) Lay

Item Number Branch/Plant

Records 1 - 7

Branch Plant	Branch Plant Description	Description	Location	Lot Serial Number	Quantity On Hand	Quantity Soft Committed	Quantity Hard Committed
M30	M30 Eastern Manufacturing Center	Paint, Red		200506010002	7500.00-		
	M30 Eastern Manufacturing Center	Primer			7450.00-		
	M30 Eastern Manufacturing Center	Inline Dryer Filter			.02-		
	M30 Eastern Manufacturing Center	Logic Board			.10-		
	M30 Eastern Manufacturing Center	Battery			.10-		
	M30 Eastern Manufacturing Center	Case			.10-		
	M30 Eastern Manufacturing Center	8954234			.22-		

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.

Query Manager

Name

Set As Default

Run When Selected

Clear Form When Selected

Conditions:

Match All Match Any

Branch Plant (QBE)

Quantity On Hand (QBE)

Additional Fields Selection

- 2nd Item Number (QBE)
- 3rd Item Number (QBE)
- ABC 1 Sls (QBE)
- ABC 2 Mrg (QBE)

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.

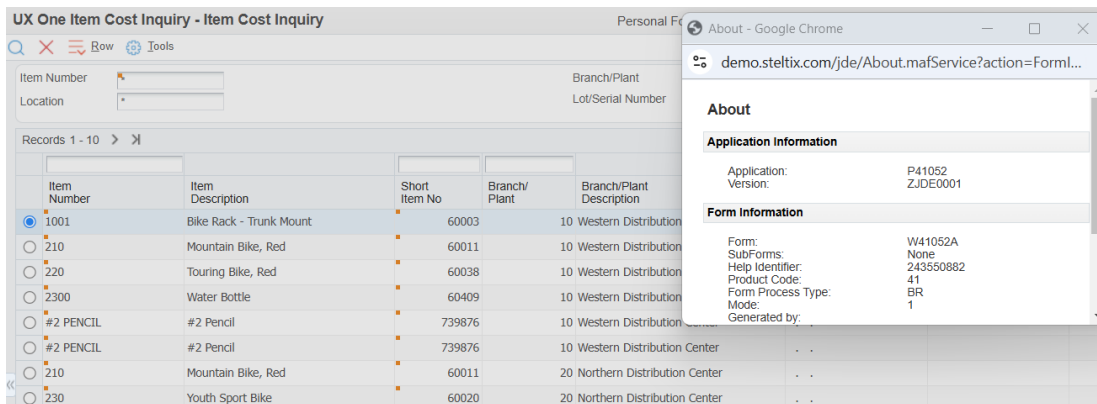
Technology used: UDO watchlist.

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.

UX One Item Cost Inquiry - Item Cost Inquiry Personal Form: (No Personalization) Layout: (No Layout)

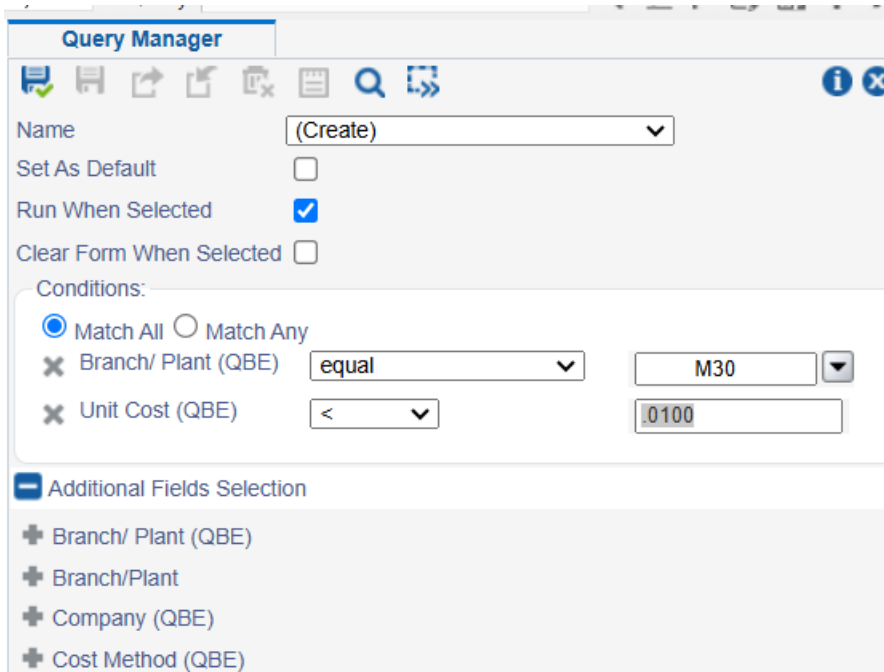
Item Number: Branch/Plant:
Location: Lot/Serial Number:

Records 1 - 10

Item Number	Item Description	Short Item No	Branch/Plant	Unit Cost	Branch/Plant Description	Location
<input checked="" type="radio"/> 222	Touring Bike, Green	60054	M30	<.0100	.0000 Eastern Manufacturing Center	. .
<input type="radio"/> 2200	Tire Pump	60290	M30	.0000	Eastern Manufacturing Center	. .
<input type="radio"/> 2203	Threaded Tube	60353	M30	.0000	Eastern Manufacturing Center	. .
<input type="radio"/> 2203	Threaded Tube	60353	M30	.0000	Eastern Manufacturing Center	. .
<input type="radio"/> 2204	Plunger	60361	M30	.0000	Eastern Manufacturing Center	. .
<input type="radio"/> 2204	Plunger	60361	M30	.0000	Eastern Manufacturing Center	. .
<input type="radio"/> 2207	Threaded Rod	60370	M30	.0000	Eastern Manufacturing Center	. .

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

Item Number	Item Description	Short Item No	Branch/Plant	Branch/Plant Description
1001	Bike Rack - Trunk Mount	60003	10	Western Distribution
210	Mountain Bike, Red	60011	10	Western Distribution
220	Touring Bike, Red	60038	10	Western Distribution
2300	Water Bottle	60409	10	Western Distribution
#2 PENCIL	#2 Pencil	739876	10	Western Distribution
#2 PENCIL	#2 Pencil	739876	10	Western Distribution Center
210	Mountain Bike, Red	60011	20	Northern Distribution Center
230	Youth Sport Bike	60020	20	Northern Distribution Center

About

Application Information

Application: P41052
Version: ZJDE0001

Form Information

Form: W41052A
SubForms: None
Help Identifier: 243550882
Product Code: 41
Form Process Type: BR
Mode: 1
Generated by:

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.

Item Number	Item Description	Branch/Plant	Cost Method	Unit Cost	Location	Lot/Serial Number	Supplier Number	Supplier Name
2019	Seat Post, BB		20 02	20.6580	. .			
2019	Seat Post, BB		20 06	20.6580	. .			
2019	Seat Post, BB		20 01	20.6580	. .			
2019	Seat Post, BB		20 08	20.6580	. .			
2019	Seat Post, BB		30 02	18.7800	. .			
2019	Seat Post, BB		30 01	18.7800	. .			
2019	Seat Post, BB		30 07	18.7800	. .			

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.

Query Manager

Name: test

Set As Default:

Run When Selected:

Clear Form When Selected:

Conditions:

Match All Match Any

Branch/ Plant (QBE) in list 20 30

Item Number (QBE) equal 2019

Cost Method (QBE) in list 08 07

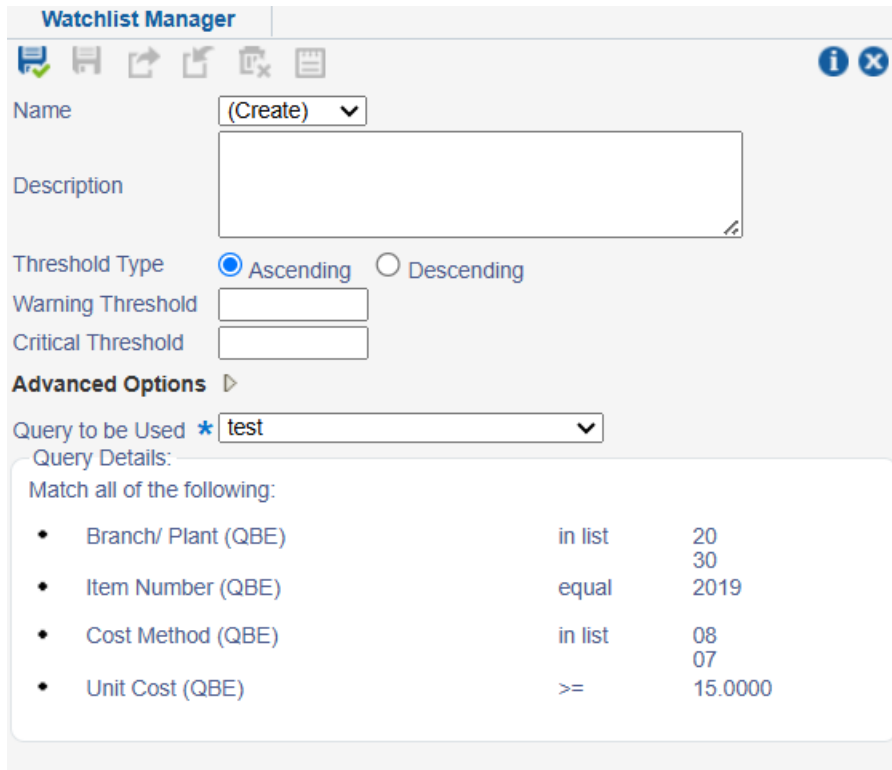
Unit Cost (QBE) >= 15.0000

+ Additional Fields Selection

\$15 is an example, given the demo data considerations

Step 4

Create a watchlist for this query, give the same name



The screenshot shows the 'Watchlist Manager' window. It has a toolbar with icons for save, refresh, share, copy, delete, and print. The 'Name' field is set to '(Create)'. The 'Description' field is empty. The 'Threshold Type' is set to 'Ascending'. The 'Warning Threshold' and 'Critical Threshold' fields are empty. The 'Advanced Options' section is expanded, showing 'Query to be Used' set to 'test'. Below this, the 'Query Details' section shows a list of conditions to match:

Field	Operator	Value
Branch/ Plant (QBE)	in list	20 30
Item Number (QBE)	equal	2019
Cost Method (QBE)	in list	08 07
Unit Cost (QBE)	>=	15.0000

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.

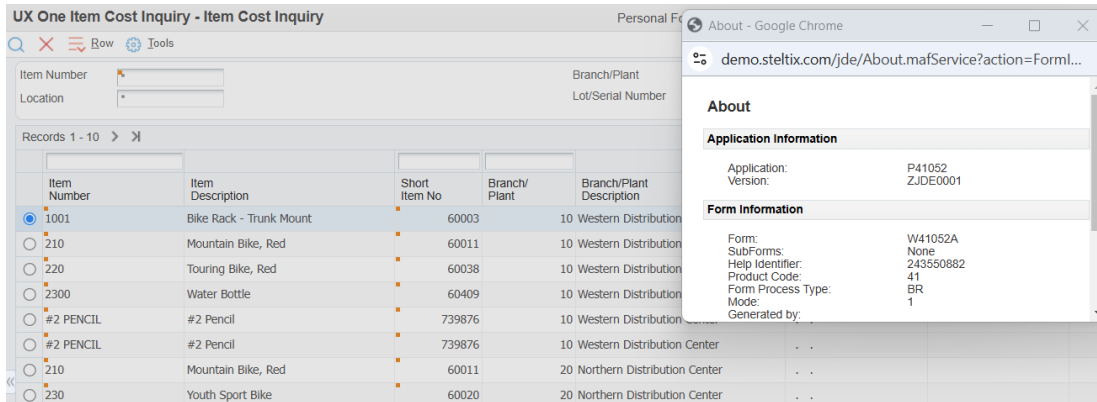
Technology used: UDO watchlist.

Limitations: Ensure you have security access to run this application

Table/Application Used: P41052

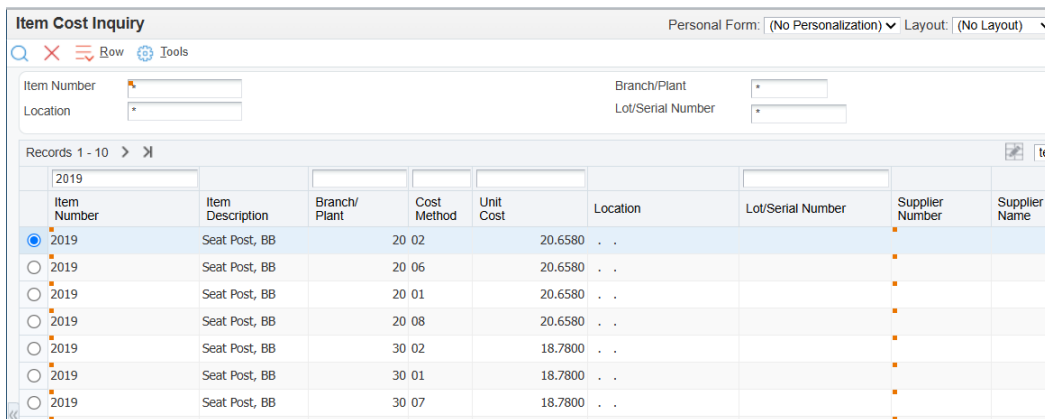
Step 1

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

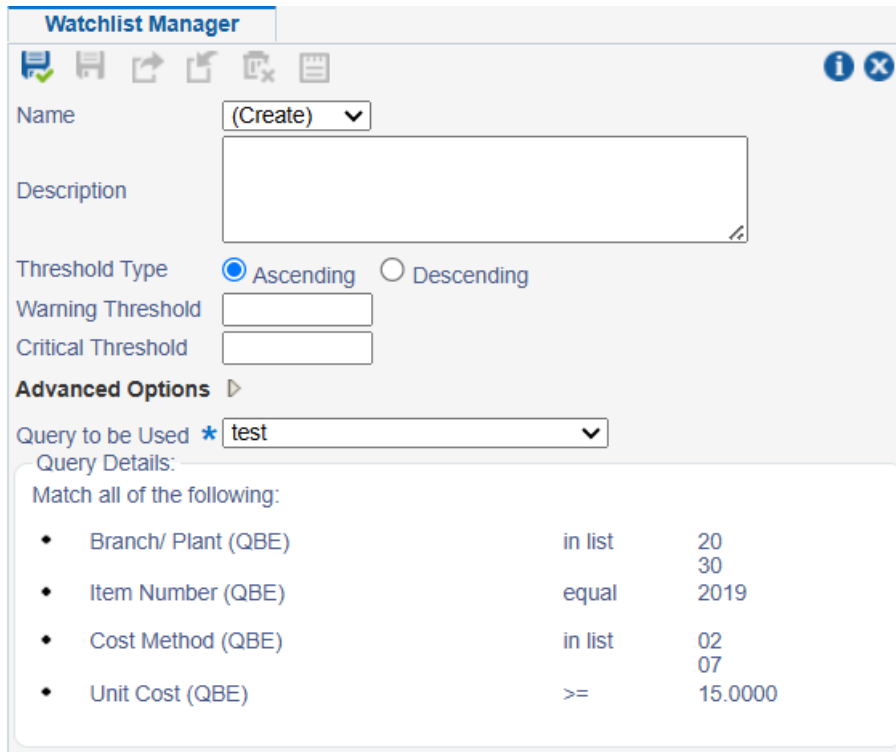
Build a query and select these two fields. If you have entered QBE previously it automatically populates that field. Save the query with a unique recognizable name.

The screenshot shows the 'Query Manager' window with the following configuration:

- Name:** test
- Set As Default:**
- Run When Selected:**
- Clear Form When Selected:**
- Conditions:**
 - Match All Match Any
 - Branch/ Plant (QBE) in list [20, 30]
 - Item Number (QBE) equal [2019]
 - Cost Method (QBE) in list [02, 07]
 - Unit Cost (QBE) >= [15.0000]
- Additional Fields Selection:** +

Step 4

Create a watchlist for this query, give the same name



The screenshot shows the 'Watchlist Manager' window. The 'Name' field is set to '(Create)'. The 'Description' field is empty. The 'Threshold Type' is set to 'Ascending'. The 'Warning Threshold' and 'Critical Threshold' fields are empty. The 'Advanced Options' section is expanded, showing 'Query to be Used' set to 'test'. Below this, the 'Query Details' section lists the following conditions:

Field	Operator	Value
Branch/ Plant (QBE)	in list	20 30
Item Number (QBE)	equal	2019
Cost Method (QBE)	in list	02 07
Unit Cost (QBE)	>=	15.0000

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

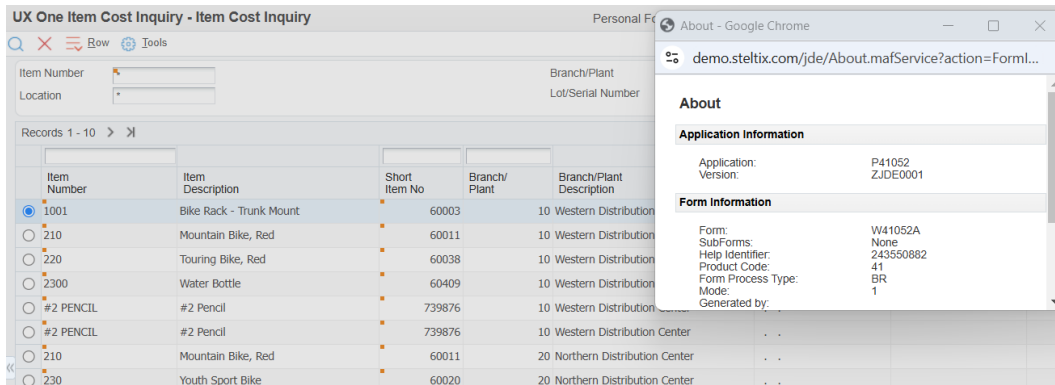
Technology used: UDO watchlist.

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.

Item Cost Inquiry Personal Form: (No Personalization) Layout: (No Layout)

Item Number: [] Branch/Plant: []
Location: [] Lot/Serial Number: []

Records 1 - 10

Item Number	Item Description	Branch/Plant	Cost Method	Unit Cost	Location	Lot/Serial Number	Supplier Number	Supplier Name
2019	Seat Post, BB		20 02	20.6580	. .			
2019	Seat Post, BB		20 06	20.6580	. .			
2019	Seat Post, BB		20 01	20.6580	. .			
2019	Seat Post, BB		20 08	20.6580	. .			
2019	Seat Post, BB		30 02	18.7800	. .			
2019	Seat Post, BB		30 01	18.7800	. .			
2019	Seat Post, BB		30 07	18.7800	. .			

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.

Query Manager

Name: test

Set As Default:

Run When Selected:

Clear Form When Selected:

Conditions:

Match All Match Any

Branch/ Plant (QBE) in list

Item Number (QBE) equal

Cost Method (QBE) in list

Unit Cost (QBE) >=

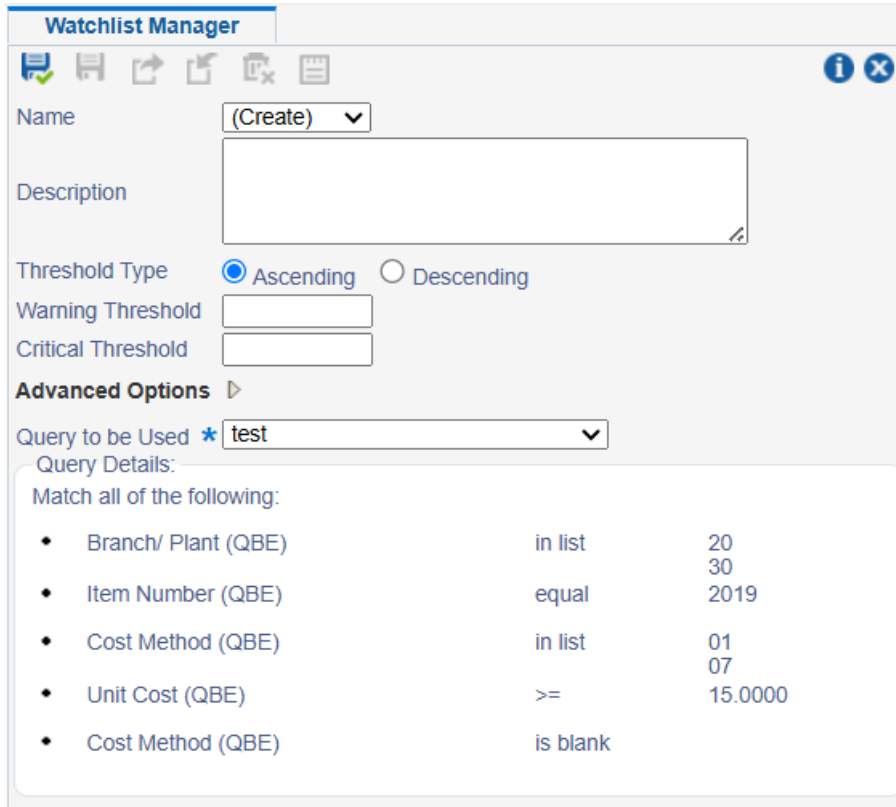
Cost Method (QBE) is blank

+ Additional Fields Selection

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



Watchlist Manager

Name: (Create) ▾

Description:

Threshold Type: Ascending Descending

Warning Threshold:

Critical Threshold:

Advanced Options ▾

Query to be Used * ▾

Query Details:

Match all of the following:

• Branch/ Plant (QBE)	in list	20 30
• Item Number (QBE)	equal	2019
• Cost Method (QBE)	in list	01 07
• Unit Cost (QBE)	>=	15.0000
• Cost Method (QBE)	is blank	

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.

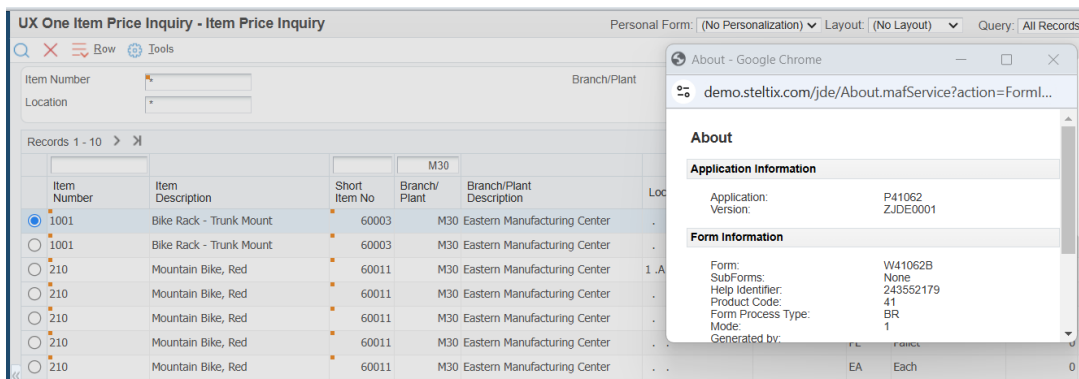
Technology used: UDO watchlist.

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.

UX One Item Price Inquiry - Item Price Inquiry Personal Form: (No Personalization) | Layout: (No Layout)

Item Number Branch/Plant

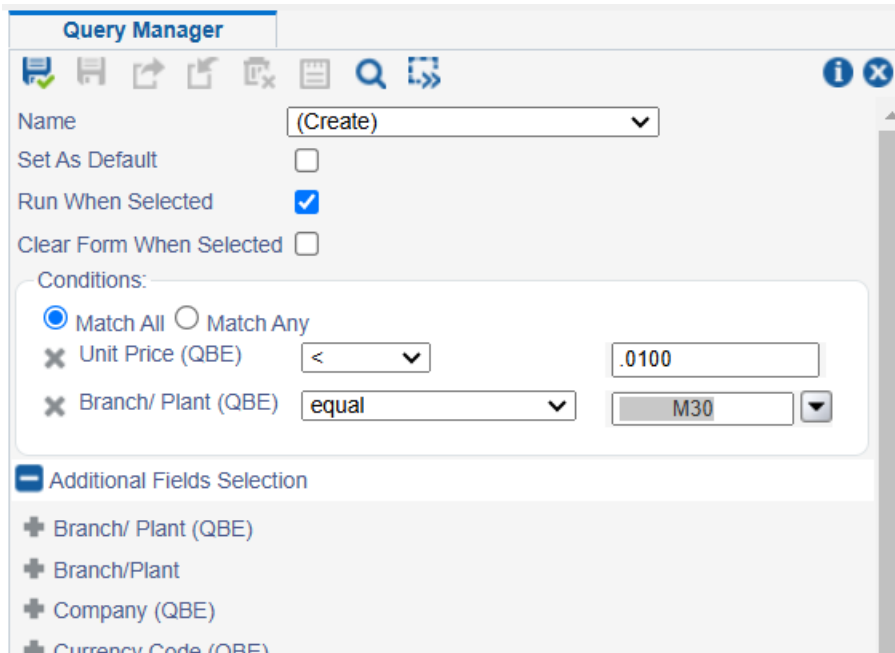
Location

Records 1 - 10 > |

Item Number	Item Description	Short Item No	Branch/Plant	Unit Price	Branch/Plant Description	Location
<input checked="" type="radio"/> 2004	Cro-Moly Frame	60097	M30	.0000	Eastern Manufacturing Center	. .
<input type="radio"/> 2005	Chain Stay	60100	M30	.0000	Eastern Manufacturing Center	. .
<input type="radio"/> 2201	Check Valve Assembly	60302	M30	.0000	Eastern Manufacturing Center	. .
<input type="radio"/> 2202	O-Ring	60311	M30	.0000	Eastern Manufacturing Center	. .
<input type="radio"/> 2205	Cap	60329	M30	.0000	Eastern Manufacturing Center	. .
<input type="radio"/> 2206	Piston	60337	M30	.0000	Eastern Manufacturing Center	. .

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).

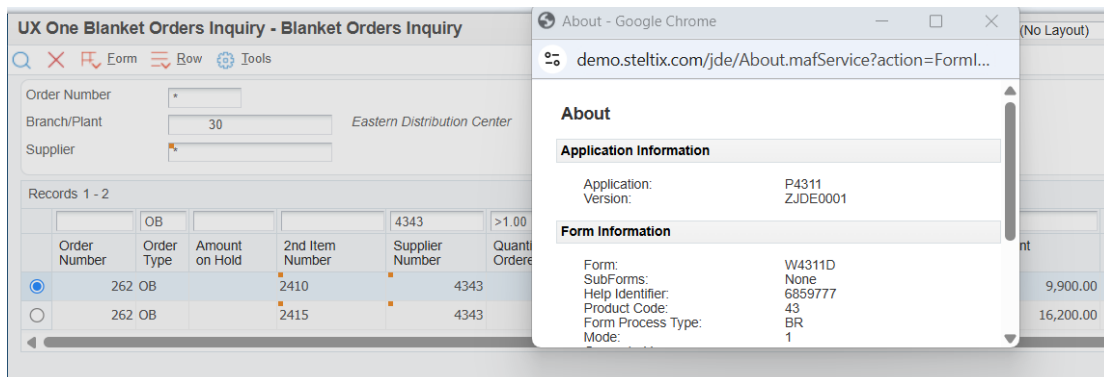
Technology used: Blanket order inquiry UxOne

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 exist, 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

UX One Blanket Orders Inquiry - Blanket Orders Inquiry Personal Form: (No Personalization) Layout: (No Layout) Query: A

Order Number Order Type
Branch/Plant 30 Eastern Distribution Center Order Company
Supplier Item Number

Records 1 - 2

Order Number	Order Type	Amount on Hold	2nd Item Number	Supplier Number	Quantity Ordered	Quantity Open	Purchasing Unit Cost	Extended Cost	Amount Open	Amount Received
262	OB	2410	4343	10.00	9.00	12.2400	11,000.00	9,900.00	1,100.00	
262	OB	2415	4343	10.00	9.00	19.1000	18,000.00	16,200.00	1,800.00	

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

Query Manager

Name: (Create) [v]

Set As Default:

Run When Selected:

Clear Form When Selected:

Conditions:

Match All Match Any

✕ Branch/Plant	equal [v]	30 [v]
✕ Order Type (QBE)	equal [v]	OB [v]
✕ Supplier Number (QBE)	= [v]	4343
✕ Quantity Ordered (QBE)	> [v]	1.00
✕ Extended Cost (QBE)	> [v]	0
✕ Amount Open (QBE)	> [v]	0
✕ Amount Received (QBE)	> [v]	0

+ Additional Fields Selection

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

Watchlist Manager

Name

Description

Threshold Type Ascending Descending

Warning Threshold

Critical Threshold

Advanced Options ▾

Query to be Used *

Query Details:

Match all of the following:

• Branch/Plant	equal	30
• Order Type (QBE)	equal	OB
• Supplier Number (QBE)	=	4343
• Quantity Ordered (QBE)	>	1.00
• Extended Cost (QBE)	>	0
• Amount Open (QBE)	>	0
• Amount Received (QBE)	>	0

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 onview 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!

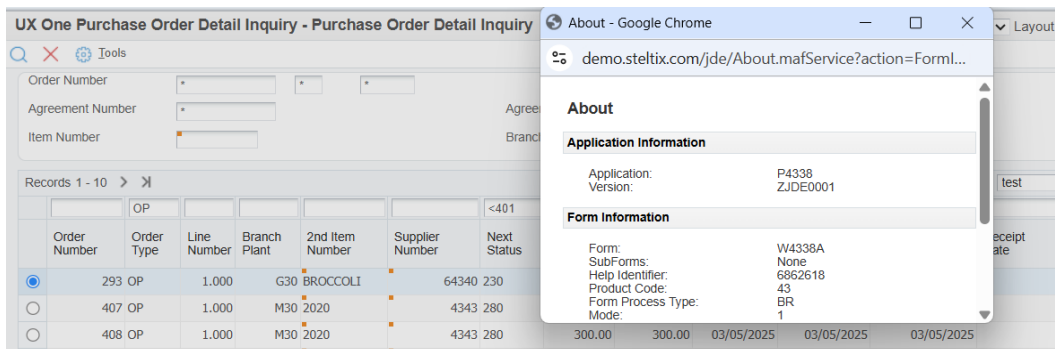
Technology used: Ux One Purchase order detail inquiry

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

UX One Purchase Order Detail Inquiry - Purchase Order Detail Inquiry Personal Form: (No Personalization) Layout: (No Layout) Query: All R

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	Original Promised Date	Receipt Date	Date Updated	Related Order Number
407	OP	1.000	M30	2020	4343	280	100.00	100.00	03/05/2025	03/05/2025	03/05/2025		03/13/2025	
408	OP	1.000	M30	2020	4343	280	300.00	300.00	03/05/2025	03/05/2025	03/05/2025		03/13/2025	
412	OP	1.000	M30	2020	4343	280	1000.00	1000.00	03/06/2025	03/06/2025	03/06/2025		03/06/2025	
415	OP	1.000	M30	2020	4343	230	35.00	35.00	03/06/2025	03/06/2025	03/06/2025		03/06/2025	
416	OP	1.000	M30	2020	4343	230	12.00	12.00	03/06/2025	03/06/2025	03/06/2025		03/06/2025	

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

Query Manager

Name: PO OverDue

Set As Default:

Run When Selected:

Clear Form When Selected:

Conditions:

Match All Match Any

✕ Branch Plant (QBE)	equal	M30
✕ Order Type (QBE)	equal	OP
✕ Next Status (QBE)	less than	401
✕ Request Date (QBE)	>=	Today minus 30 days
✕ Receipt Date (QBE)	is blank	

+ Additional Fields Selection

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

Watchlist Manager

Name (Create) [v]

Description []

Threshold Type Ascending Descending

Warning Threshold []

Critical Threshold []

Advanced Options ▾

Query to be Used * PO OverDue [v]

Query Details:

Match all of the following:

- Branch Plant (QBE) equal M30
- Order Type (QBE) equal OP
- Next Status (QBE) less than 401
- Request Date (QBE) >= Today minus 30 days
- Receipt Date (QBE) is blank

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

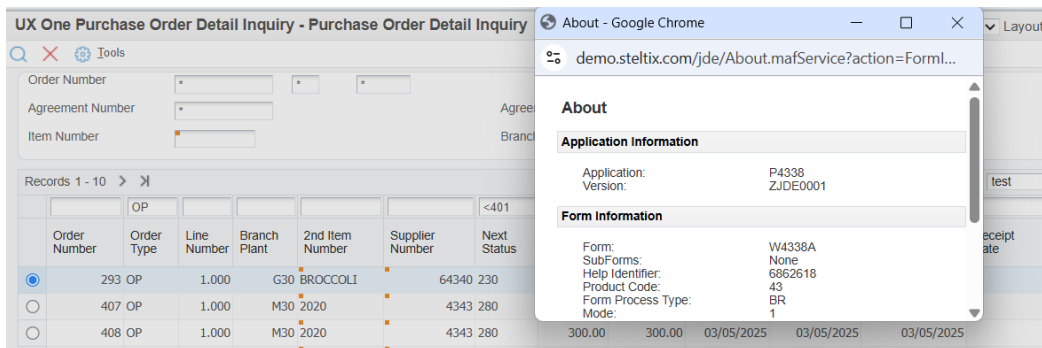
Limitations: None. Please check security granted to right roles, these are UX One applications. Regular PO entry applicable may be possible if you add grid extension fields.

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 exist, 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

UX One Purchase Order Detail Inquiry - Purchase Order Detail Inquiry Personal Form: (No Personalization) Layout: (No Layout) Query: All R

Tools

Order Number: * * *

Agreement Number: * Agreement Supplement: *

Item Number: * Branch/Plant: *

Records 1 - 10 > X

Order Number	Order Type	Line Number	Branch Plant	2nd Item Number	Supplier Number	Next Status	Quantity Ordered	Quantity Open	Order Date	Request Date	Original Promised Date	Receipt Date	Date Updated	Related Order Number
407	OP	1.000	M30	2020	4343	280	100.00	100.00	03/05/2025	03/05/2025	03/05/2025		03/13/2025	
408	OP	1.000	M30	2020	4343	280	300.00	300.00	03/05/2025	03/05/2025	03/05/2025		03/13/2025	
412	OP	1.000	M30	2020	4343	280	1000.00	1000.00	03/06/2025	03/06/2025	03/06/2025		03/06/2025	
415	OP	1.000	M30	2020	4343	230	35.00	35.00	03/06/2025	03/06/2025	03/06/2025		03/06/2025	
416	OP	1.000	M30	2020	4343	230	12.00	12.00	03/06/2025	03/06/2025	03/06/2025		03/06/2025	

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

Query Manager

Name: PO delayed

Set As Default:

Run When Selected:

Clear Form When Selected:

Conditions:

Match All Match Any

<input checked="" type="checkbox"/> Branch Plant (QBE)	equal	M30
<input checked="" type="checkbox"/> Order Type (QBE)	equal	OP
<input checked="" type="checkbox"/> Next Status (QBE)	less than	401
<input checked="" type="checkbox"/> Request Date (QBE)	>=	Today minus 30 days
<input checked="" type="checkbox"/> Receipt Date (QBE)	is not blank	
<input checked="" type="checkbox"/> Quantity Ordered (QBE)	>	1.00
<input checked="" type="checkbox"/> Quantity Open (QBE)	!=	0

+ Additional Fields Selection

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

Watchlist Manager

Name

Description

Threshold Type Ascending Descending

Warning Threshold

Critical Threshold

Advanced Options ▾

Query to be Used *

Query Details:

Match all of the following:

• Branch Plant (QBE)	equal	M30
• Order Type (QBE)	equal	OP
• Next Status (QBE)	less than	401
• Request Date (QBE)	>=	Today minus 30 days
• Receipt Date (QBE)	is not blank	
• Quantity Ordered (QBE)	>	1.00
• Quantity Open (QBE)	!=	0

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

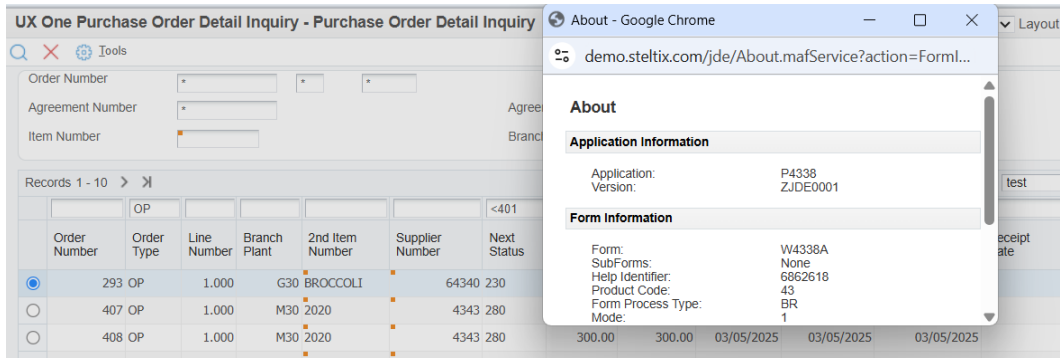
Limitations: None. Please check security granted to right roles, these are UX One applications. Regular PO entry applicable may be possible if you add grid extension fields.

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

UX One Purchase Order Detail Inquiry - Purchase Order Detail Inquiry

Personal Form: (No Personalization) Layout: (No Layout) Query: All R

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	Original Promised Date	Receipt Date	Date Updated	Related Order Number
407	OP	1.000	M30 2020		4343 280		100.00	100.00	03/05/2025	03/05/2025	03/05/2025		03/13/2025	
408	OP	1.000	M30 2020		4343 280		300.00	300.00	03/05/2025	03/05/2025	03/05/2025		03/13/2025	
412	OP	1.000	M30 2020		4343 280		1000.00	1000.00	03/06/2025	03/06/2025	03/06/2025		03/06/2025	
415	OP	1.000	M30 2020		4343 230		35.00	35.00	03/06/2025	03/06/2025	03/06/2025		03/06/2025	
416	OP	1.000	M30 2020		4343 230		12.00	12.00	03/06/2025	03/06/2025	03/06/2025		03/06/2025	

Step 3

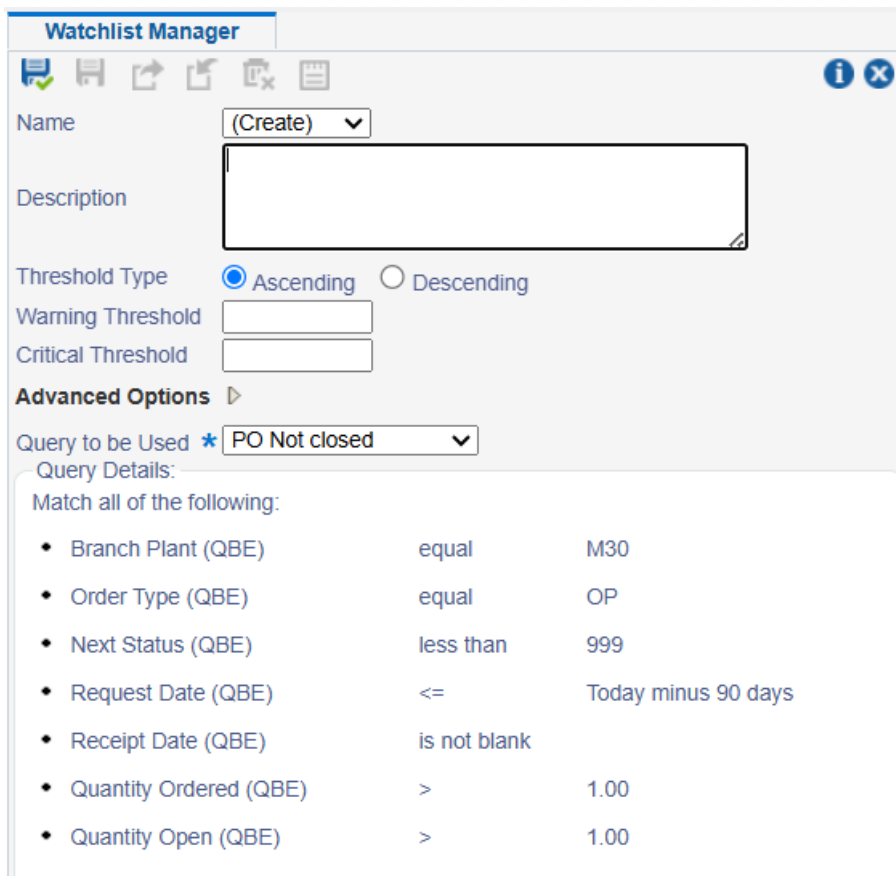
Create a new query. Use the right pane selections to start with. Branch plant, order type, next status (<999 in this example), request date < today minus 90 days (as example). Save the query with a unique understandable name

The screenshot shows the 'Query Manager' interface. At the top, there are icons for save, refresh, share, copy, delete, and search. The 'Name' field is set to 'PO Not closed'. Below this, there are checkboxes for 'Set As Default' (unchecked), 'Run When Selected' (checked), and 'Clear Form When Selected' (unchecked). The 'Conditions' section is expanded, showing a list of criteria with radio buttons for 'Match All' (selected) and 'Match Any'. The conditions are: Branch Plant (QBE) equal to M30, Order Type (QBE) equal to OP, Next Status (QBE) less than 999, Request Date (QBE) less than or equal to Today minus 90 days, Receipt Date (QBE) is not blank, Quantity Ordered (QBE) greater than 1.00, and Quantity Open (QBE) greater than 1.00. At the bottom, there is a '+ Additional Fields Selection' button.

Field	Operator	Value
Branch Plant (QBE)	equal	M30
Order Type (QBE)	equal	OP
Next Status (QBE)	less than	999
Request Date (QBE)	<=	Today minus 90 days
Receipt Date (QBE)	is not blank	
Quantity Ordered (QBE)	>	1.00
Quantity Open (QBE)	>	1.00

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



Watchlist Manager

Name: (Create) ▾

Description:

Threshold Type: Ascending Descending

Warning Threshold:

Critical Threshold:

Advanced Options ▾

Query to be Used * ▾

Query Details:

Match all of the following:

- Branch Plant (QBE) equal M30
- Order Type (QBE) equal OP
- Next Status (QBE) less than 999
- Request Date (QBE) <= Today minus 90 days
- Receipt Date (QBE) is not blank
- Quantity Ordered (QBE) > 1.00
- Quantity Open (QBE) > 1.00

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 onview 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

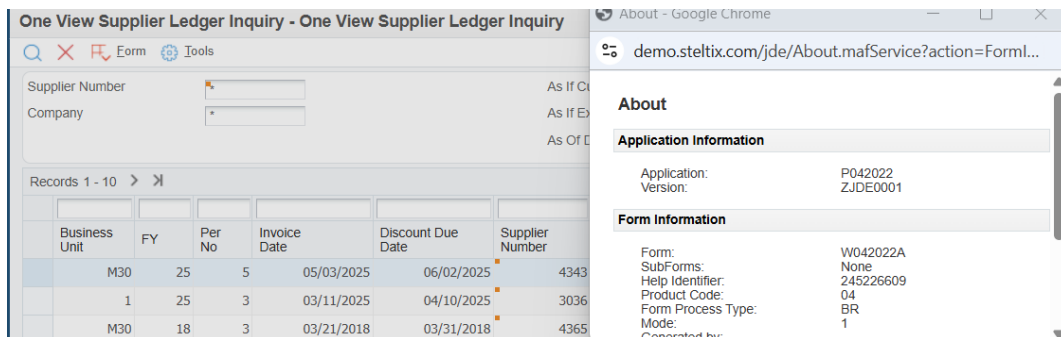
Limitations: None. Please check security granted to right roles, these are one view inquiry applications. 04 means AP, but you are only looking vendor performance dollar wise in a year and the discounts availed. AP team lead can run this inquiry but a watchlist for purchasing will help immensely.

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 exist, 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



Business Unit	FY	Per No	Invoice Date	Discount Due Date	Supplier Number
M30	25	5	05/03/2025	06/02/2025	4343
1	25	3	03/11/2025	04/10/2025	3036
M30	18	3	03/21/2018	03/31/2018	4365

About

Application Information

Application: P042022
Version: ZJDE0001

Form Information

Form: W042022A
SubForms: None
Help Identifier: 245226609
Product Code: 04
Form Process Type: BR
Mode: 1
Generated by: tv

Step 2

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

One View Supplier Ledger Inquiry - One View Supplier Ledger Inquiry Personal Form: (No Personalization) Layout

Supplier Number As If Currency Pay Status All Open
Company As If Exchange Rate Date
As Of Date

Records 1 - 2

Business Unit	FY	Per No	Invoice Date	Discount Due Date	Supplier Number	Supplier Name	Base Curr	Gross Amount	Open Amount	Discount Available
M30	25	5	05/03/2025	06/02/2025	4343	Parts Emporium	USD	10,000.00	10,000.00	.00
M30	25	3	03/12/2025	04/11/2025	64360	Additives Supplier	USD	1,000.00	1,000.00	.00

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

Query Manager

Name: (Create) ▼

Set As Default:

Run When Selected:

Clear Form When Selected:

Conditions:

Match All Match Any

Business Unit (QBE) equal ▼ M30 ▼

FY (QBE) = ▼ 25

Per No (QBE) in list ▼

1

2

3

4

5

Supplier Number (QBE) = ▼ 4343

+ Additional Fields Selection

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 exist, 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

One View Customer Ledger Inquiry

demo.steltix.com/jde/About.mafService?action=Forml...

About

Application Information

Application: P03B2022
Version: ZJDE0001

Form Information

Form: W03B2022A
SubForms: None
Help Identifier: 1198836850
Product Code: 03B
Form Process Type: BR

Parent Number	FY	Per No	Or Ty	Invoice Date	Customer Number
4242	25	3		03/14/2025	4242
4242	25	3		03/06/2025	4242

Step 2

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

One View Customer Ledger Inquiry

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

Customer Number: [] As If Currency: [] Pay Status: All Open Paid
Company: [] As If Exchange Rate Date: []
Collection Manager: [] As Of Date: 03/15/2025 Aging

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
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

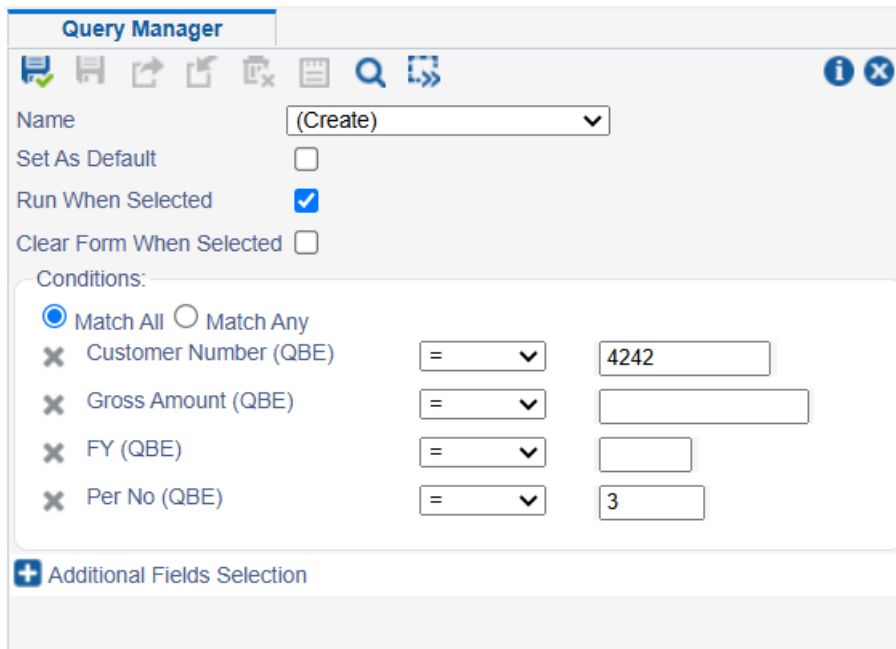
test

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.



The screenshot shows the 'Query Manager' window. At the top, there is a toolbar with icons for save, refresh, undo, redo, delete, and search. Below the toolbar, the 'Name' field is set to '(Create)'. There are three checkboxes: 'Set As Default' (unchecked), 'Run When Selected' (checked), and 'Clear Form When Selected' (unchecked). The 'Conditions' section is expanded, showing a list of filters. The 'Match All' radio button is selected. The filters are: 'Customer Number (QBE)' with a value of '4242', 'Gross Amount (QBE)' with an empty field, 'FY (QBE)' with an empty field, and 'Per No (QBE)' with a value of '3'. At the bottom, there is a '+ Additional Fields Selection' button.

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 onview 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

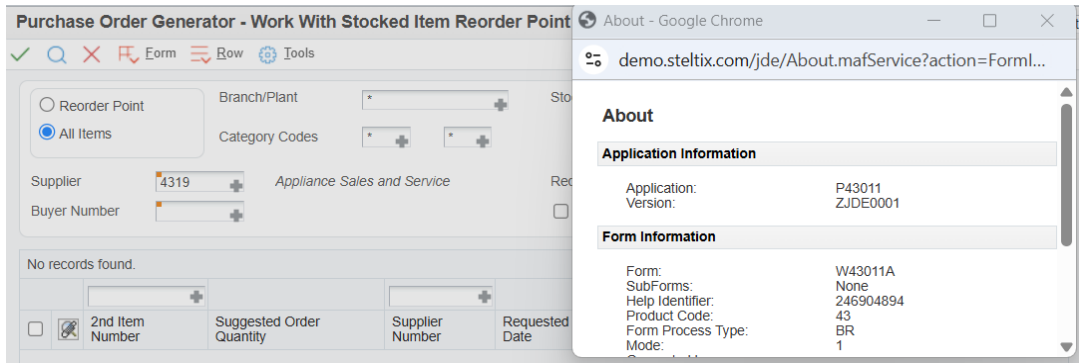
Limitations: None. This tool is used for non-MRP items. Reorder point levels and quantity need to be defined in item branch records. Order policy code should not be MRP.

Limitations: None. Please check security granted to right roles

Table/Application Used: P43011

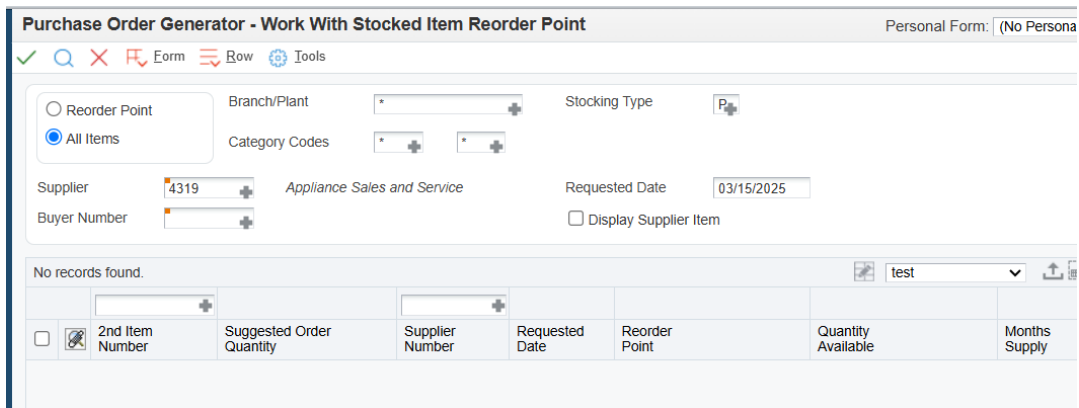
Step 1

Open this application from your menu. If it does not exist, 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



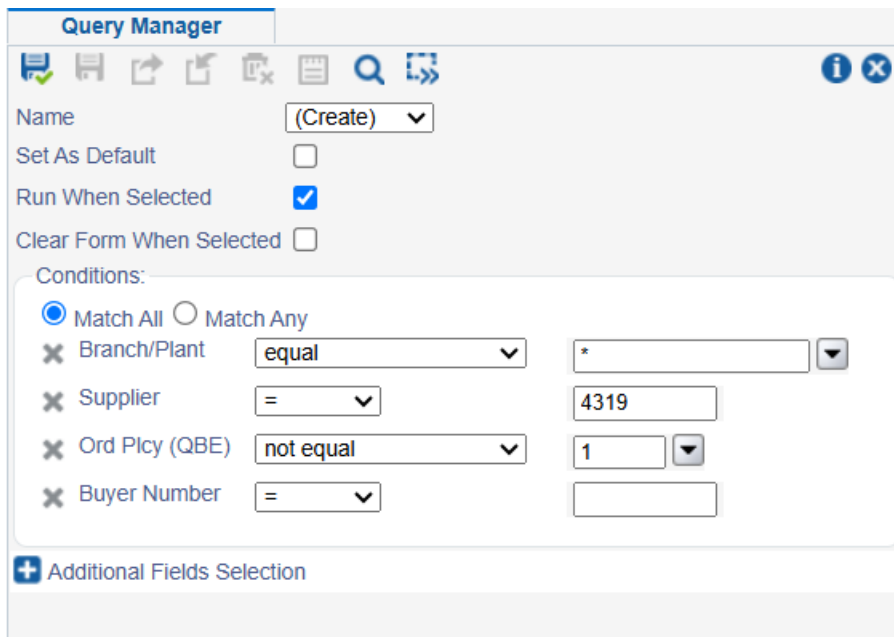
Step 2

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 use 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.



The screenshot shows the 'Query Manager' window with the following settings:

- Name: (Create) [v]
- Set As Default:
- Run When Selected:
- Clear Form When Selected:
- Conditions:
 - Match All Match Any
 - Branch/Plant: equal [v] * [v]
 - Supplier: = [v] 4319
 - Ord Plcy (QBE): not equal [v] 1 [v]
 - Buyer Number: = [v] []
- + Additional Fields Selection

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

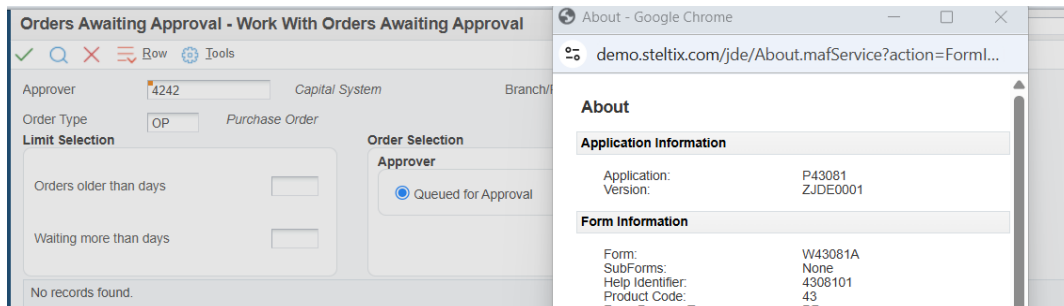
Limitations: None. Please check security granted to right roles, these are inquiry application and not exactly approval application

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)

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
<input type="checkbox"/>		BRANCH	2,500.00	03/07/2025	8	421 OP	00200		03/07/2025	Approved
<input type="checkbox"/>		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.

The screenshot shows the 'Query Manager' window with the following configuration:

- Name: (Create)
- Set As Default:
- Run When Selected:
- Clear Form When Selected:
- Conditions:
 - Match All (selected) / Match Any
 - Branch/Plant: equal, M30
 - Person (QBE): =, 4242
 - Approval Route Code (QBE): equal, [empty]
 - Order Amount (QBE): >, 1,000.00
 - Request Date (QBE): >=, Today plus 7 days
- + Additional Fields Selection

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 onview 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 exist, 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

The screenshot displays the 'One View Item Usage Trace Inquiry' application interface. The main window shows a table with columns for Branch Plant, Item Number, Short Item No, G/L Month, and Trans Quantity. The table contains five rows of data for various items and months. An 'About' dialog box is open in the foreground, displaying application and form information.

Branch Plant	Item Number	Short Item No	G/L Month	Trans Quantity
M30	2005	60100	6	900
M30	2019	60249	3	10000
M30	2019	60249	3	500
M30	2020	60257	3	700
M30	2020	60257	3	400.00

About

Application Information

Application: P41273
Version: ZJDE0001

Form Information

Form: W41273A
SubForms: None
Help Identifier: 243646822
Product Code: 41
Form Process Type: BR
Mode: 1
Generated by:

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)

Document Company: 00200 Manufacturing/Distribution Co. Document Type: *
Item Number: * Branch Plant: *

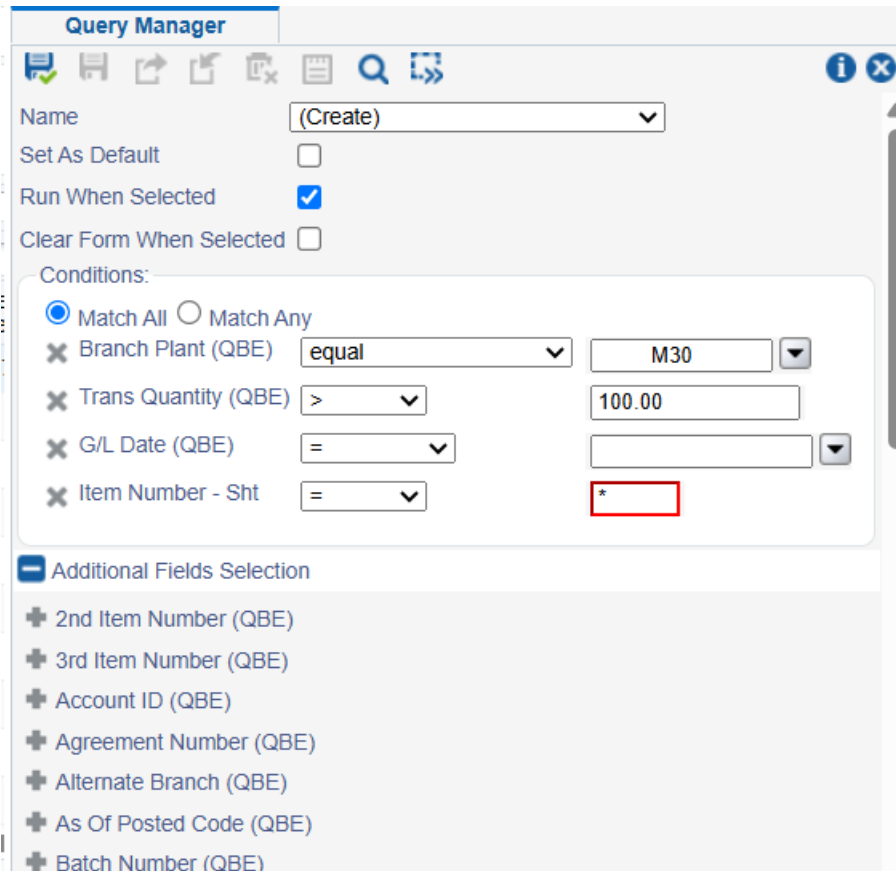
Records 1 - 10 > X

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	2005	60100	6	>100.00	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 onview 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

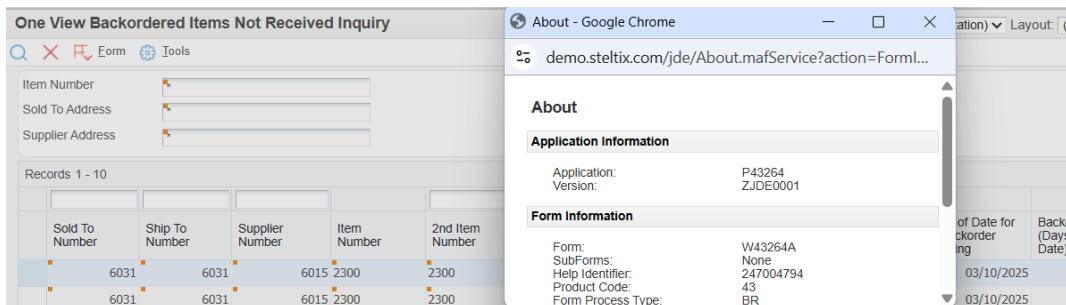
Limitations: None. Please check security granted to right roles, these are one view inquiry applications.

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 exist, 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 have 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)

Q X Form Tools

Item Number: As If Currency:
Sold To Address: As of Date:
Supplier Address: 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)
	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.

Query Manager

Name (Create) v

Set As Default

Run When Selected

Clear Form When Selected

Conditions:

Match All Match Any

Sold To Number (QBE) = v

Ship To Number (QBE) = v

Supplier Number (QBE) = v

2nd Item Number (QBE) equal v 2300 v

Purchase Order Type (QBE) equal v

Request Date (QBE) <= v Today minus 60 days v

+ Additional Fields Selection

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

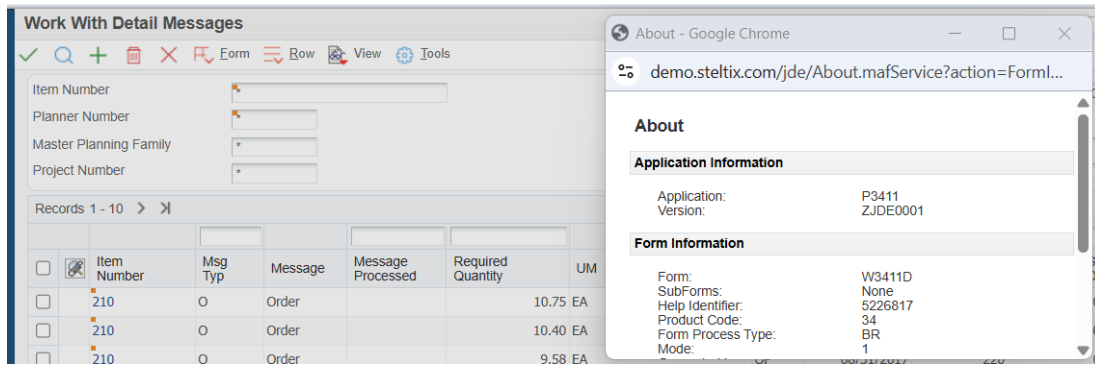
Limitations: None. Please check security granted to right roles.

There is also onview planning analysis application if your management does not want to expose the key p3411 to many other roles.

Table/Application Used: P3411

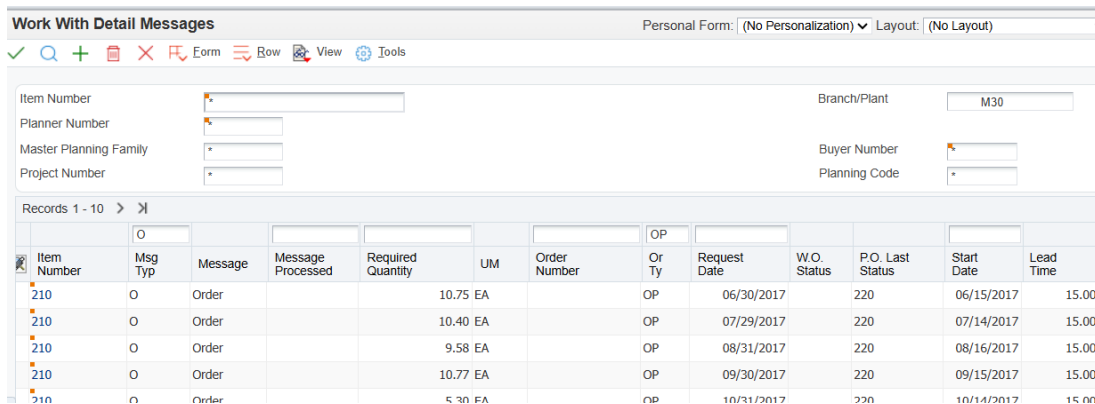
Step 1

Open this application from your menu. If it does not exist, 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

The screenshot shows the 'Work With Detail Messages' application window. The main area displays a table with columns: Item Number, Msg Typ, Message, Message Processed, Required Quantity, UM, Order Number, Or Ty, Request Date, W.O. Status, P.O. Last Status, and Start Date. The data rows show items 210 with various order types and dates from 06/30/2017 to 11/30/2017.

The 'Query Manager' panel on the right is active, showing the following configuration:

- Name: (Create)
- Set As Default:
- Run When Selected:
- Clear Form When Selected:
- Conditions:
 - Match All (selected) / Match Any
 - Demand Branch (QBE): equal, M30
 - Or Ty (QBE): equal, OP
 - Msg Typ (QBE): in list, B, O
 - Request Date (QBE): >=, Today plus 30 days
- Additional Fields Selection: +

This is a close-up view of the 'Query Manager' panel. It shows the configuration for a watch list with the following details:

- Name: (Create)
- Set As Default:
- Run When Selected:
- Clear Form When Selected:
- Conditions:
 - Match All (selected) / Match Any
 - Demand Branch (QBE): equal, M30
 - Or Ty (QBE): equal, OP
 - Msg Typ (QBE): in list, B, O
 - Request Date (QBE): >=, Today plus 30 days
- Additional Fields Selection: +

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

Watchlist Manager

Name: (Create) ▾

Description: explain the business need

Threshold Type: Ascending Descending

Warning Threshold:

Critical Threshold:

Advanced Options ▾

Query to be Used * test ▾

Query Details:

Match all of the following:

- Demand Branch (QBE) equal M30
- Or Ty (QBE) equal OP
- Msg Typ (QBE) in list B
O
- Request Date (QBE) >= Today plus 30 days

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 exist, 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

The screenshot displays the 'Work With Detail Messages' application interface on the left and a browser window on the right. The application interface includes a search bar with fields for Item Number, Planner Number, Master Planning Family, and Project Number. Below the search bar is a table with columns: Item Number, Msg Typ, Message, Message Processed, Required Quantity, and UM. The table contains three rows of data for Item Number 210.

Item Number	Msg Typ	Message	Message Processed	Required Quantity	UM
210	O	Order		10.75	EA
210	O	Order		10.40	EA
210	O	Order		9.58	EA

The browser window on the right shows the 'About' page for the application. It contains the following information:

About

Application Information

Application: P3411
Version: ZJDE0001

Form Information

Form: W3411D
SubForms: None
Help Identifier: 5226817
Product Code: 34
Form Process Type: BR
Mode: 1

Step 2

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

Work With Detail Messages Personal Form: (No Personalization) Layout: (No Layout)

Item Number: Branch/Plant:

Planner Number:

Master Planning Family: Buyer Number:

Project Number: Planning Code:

Records 1 - 10

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	Lead Time
210	O	Order		10.75 EA			OP	06/30/2017	220		06/15/2017	15.00
210	O	Order		10.40 EA			OP	07/29/2017	220		07/14/2017	15.00
210	O	Order		9.58 EA			OP	08/31/2017	220		08/16/2017	15.00
210	O	Order		10.77 EA			OP	09/30/2017	220		09/15/2017	15.00
210	O	Order		5.30 EA			OP	10/31/2017	220		10/14/2017	15.00

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

Work With Detail Messages Personal Form: (No Personalization) Layout: (No Layout) Query: test1

Item Number: Branch/Plant:

Planner Number:

Master Planning Family: Buyer Number:

Project Number: Planning Code:

Records 1 - 10

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	Lead Time
210	O	Order		10.75 EA			OP	06/30/2017	220		06/15/2017	15.00
210	O	Order		10.40 EA			OP	07/29/2017	220		07/14/2017	15.00
210	O	Order		9.58 EA			OP	08/31/2017	220		08/16/2017	15.00
210	O	Order		10.77 EA			OP	09/30/2017	220		09/15/2017	15.00
210	O	Order		5.30 EA			OP	10/31/2017	220		10/14/2017	15.00

Query Manager Query: test1

Name: test1

Set As Default:

Run When Selected:

Clear Form When Selected:

Conditions:

- Match All Match Any
- Demand Branch (QBE) equal M30
- Msg Typ (QBE) equal T
- Or Ty (QBE) equal OP
- Request Date (QBE) <= Today minus 30 days

Additional Fields Selection

Query Manager

Name: test1

Set As Default:

Run When Selected:

Clear Form When Selected:

Conditions:

Match All Match Any

Demand Branch (QBE) equal M30

Msg Typ (QBE) equal T

Or Ty (QBE) equal OP

Request Date (QBE) <= Today minus 30 days

+ Additional Fields Selection

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

Watchlist Manager

Name (Create) ▾

Description

Threshold Type Ascending Descending

Warning Threshold

Critical Threshold

Advanced Options ▸

Query to be Used * test1 ▾

Query Details:

Match all of the following:

- Demand Branch (QBE) equal M30
- Msg Typ (QBE) equal T
- Or Ty (QBE) equal OP
- Request Date (QBE) <= Today minus 30 days

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

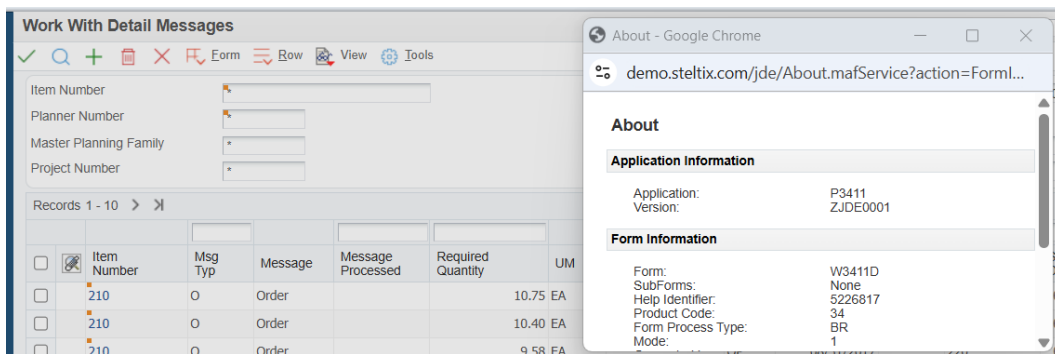
Limitations: None. Please check security granted to right roles.

There is also onview planning analysis application if your management does not want to expose the key p3411 to many other roles.

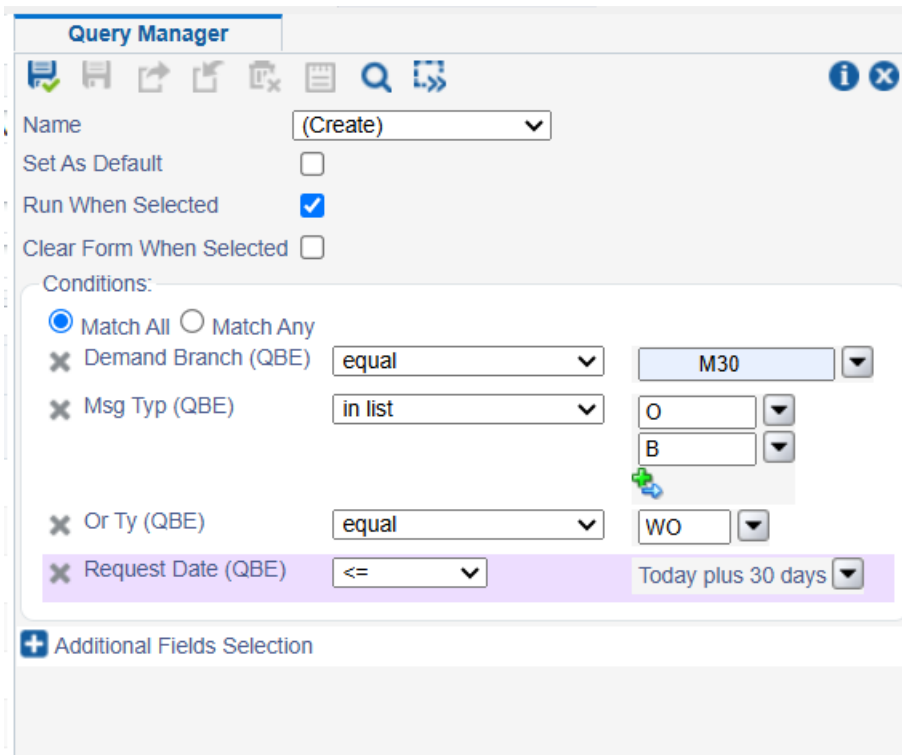
Table/Application Used: P3411

Step 1

Open this application from your menu. If it does not exist, 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



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

Watchlist Manager

Name: (Create) ▾

Description: explain the need

Threshold Type: Ascending Descending

Warning Threshold:

Critical Threshold:

Advanced Options ▾

Query to be Used * test1 ▾

Query Details:

Match all of the following:

- Demand Branch (QBE) equal M30
- Msg Typ (QBE) in list O
B
- Or Ty (QBE) equal WO
- Request Date (QBE) <= Today plus 30 days

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 onview 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.

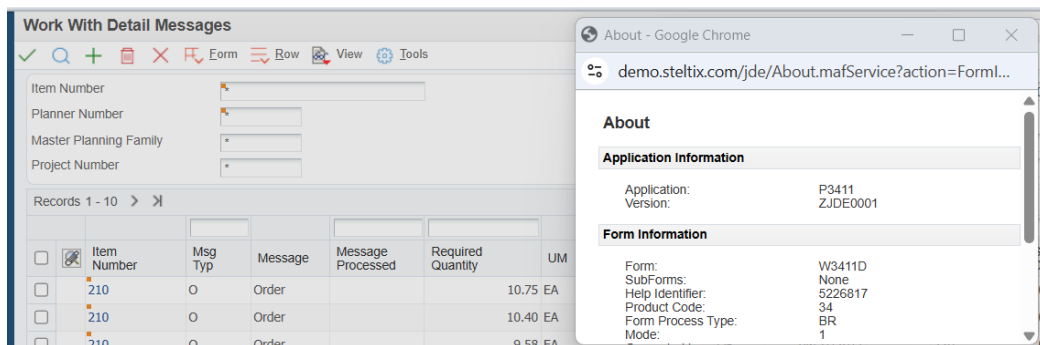
Technology used: MRP messages application

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 exist, 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



The screenshot displays two overlapping windows. The primary window is titled "Work With Detail Messages" and features a search form with fields for "Item Number", "Planner Number", "Master Planning Family", and "Project Number". Below the form is a table with columns: "Item Number", "Msg Typ", "Message", "Message Processed", "Required Quantity", and "UM". The table contains three rows of data for Item Number 210, all with "Order" messages and "EA" units.

Item Number	Msg Typ	Message	Message Processed	Required Quantity	UM
210	O	Order		10.75	EA
210	O	Order		10.40	EA
210	O	Order		9.58	EA

The secondary window is a Chrome browser window titled "About - Google Chrome" showing the URL "demo.steltix.com/jde/About.mafService?action=Forml...". The "About" page displays the following information:

- Application Information**
 - Application: P3411
 - Version: ZJDE0001
- Form Information**
 - Form: W3411D
 - SubForms: None
 - Help Identifier: 5226817
 - Product Code: 34
 - Form Process Type: BR
 - Mode: 1

Step 2

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

The screenshot shows the 'Work With Detail Messages' interface. At the top, there are search filters for Item Number, Planner Number, Master Planning Family, Project Number, Branch/Plant (M30), Buyer Number, and Planning Code. Below the filters is a table with the following columns: 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, and Lead Time. The table contains five rows of data for Item Number 210.

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	Lead Time
210	O	Order		10.75	EA		OP	06/30/2017	220		06/15/2017	15.00
210	O	Order		10.40	EA		OP	07/29/2017	220		07/14/2017	15.00
210	O	Order		9.58	EA		OP	08/31/2017	220		08/16/2017	15.00
210	O	Order		10.77	EA		OP	09/30/2017	220		09/15/2017	15.00
210	O	Order		5.30	EA		OP	10/31/2017	220		10/14/2017	15.00

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

The screenshot shows the 'Work With Detail Messages' interface with the 'Query Manager' pane open on the right. The query name is 'test1'. The conditions are: Demand Branch (QBE) equal M30, Msg Typ (QBE) equal T, Or Ty (QBE) equal WQ, and Request Date (QBE) <= Today minus 30 days. The data grid below shows the same data as in Step 2, but with checkboxes in the first column.

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	Lead Time
<input type="checkbox"/>	210	O	Order		10.75	EA		OP	06/30/2017	220		
<input type="checkbox"/>	210	O	Order		10.40	EA		OP	07/29/2017	220		
<input type="checkbox"/>	210	O	Order		9.58	EA		OP	08/31/2017	220		
<input type="checkbox"/>	210	O	Order		10.77	EA		OP	09/30/2017	220		

Query Manager

Name: test1

Set As Default:

Run When Selected:

Clear Form When Selected:

Conditions:

Match All Match Any

Demand Branch (QBE) equal M30

Msg Typ (QBE) equal T

Or Ty (QBE) equal WO

Request Date (QBE) <= Today minus 30 days

+ Additional Fields Selection

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

Watchlist Manager

Name

Description

Threshold Type Ascending Descending

Warning Threshold

Critical Threshold

Advanced Options ▸

Query to be Used *

Query Details:

Match all of the following:

- Demand Branch (QBE) equal M30
- Msg Typ (QBE) equal T
- Or Ty (QBE) equal WO
- Request Date (QBE) <= Today minus 30 days

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 onview 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

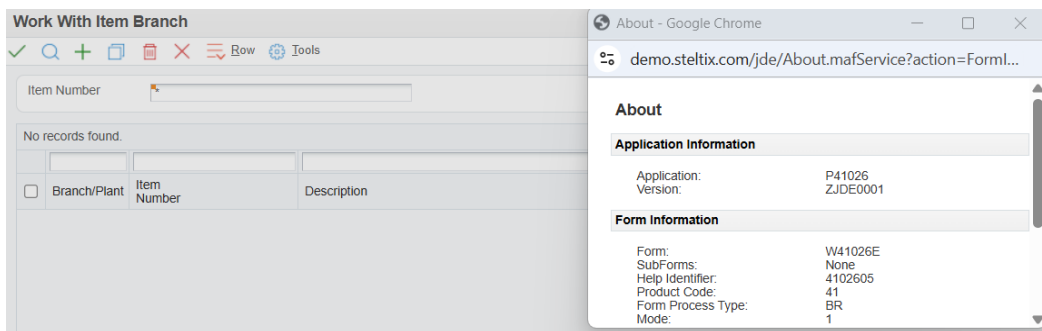
Technology used: Item Branch application

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 exist, 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

<input type="checkbox"/>	M30		P*	S					
<input type="checkbox"/>	Branch/Plant	Item Number	Description	Stocking Type	Buyer Number	Planner Number	Supplier Number	Plan Fmly	Line Type
<input type="checkbox"/>		M30 TW60EX	Pallet Type #3	S					S
<input type="checkbox"/>		M30 AP020	Parent (Commitments)	S					S
<input type="checkbox"/>		M30 AP002	Parent Item	S					S
<input type="checkbox"/>		M30 AP001	Parent Item 2nd	S					S
<input type="checkbox"/>		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	I	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	I	1	1	15 C		3	60	5

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
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

Query Manager

Save Refresh Copy Paste Print Search Help

Name

Set As Default

Run When Selected

Clear Form When Selected

Conditions:

Match All Match Any

Message Time Fence Days (QBE) < 1

Leadtime Level (QBE) > 1

Branch/Plant (QBE) equal M30

Stocking Type (QBE) equal P

+ Additional Fields Selection

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

The screenshot shows the 'Watchlist Manager' window with the following configuration:

- Name:** (Create) [dropdown]
- Description:** [text area]
- Threshold Type:** Ascending Descending
- Warning Threshold:** [text input]
- Critical Threshold:** [text input]
- Advanced Options:** [expanded]
- Query to be Used:** * test [dropdown]
- Query Details:** Match all of the following:

• Message Time Fence Days (QBE)	<	1
• Leadtime Level (QBE)	>	1
• Branch/Plant (QBE)	equal	M30
• Stocking Type (QBE)	equal	P

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 onview 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.

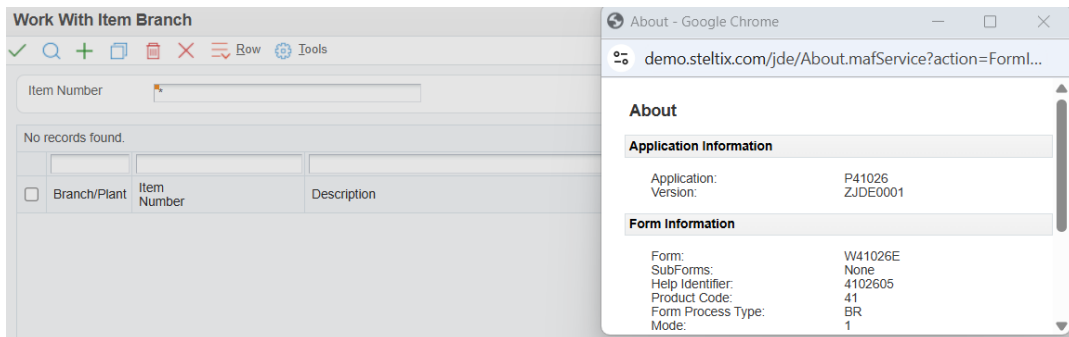
Technology used: Item Branch application

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 exist, 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

<input type="checkbox"/>	M30			P			<1	200	
<input type="checkbox"/>	Branch/Plant	Item Number	Description	Stocking Type	Buyer Number	Planner Number	Supplier Number	Plan Fmly	Line Type
<input type="checkbox"/>	M30	2002	Cro-Moly Frame, Two Tone	P	8444	8444		200	S
<input type="checkbox"/>	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

The screenshot shows the 'Query Manager' window with the following configuration:

- Name: test1
- Set As Default:
- Run When Selected:
- Clear Form When Selected:
- Conditions:
 - Match All (selected) / Match Any
 - Branch/Plant (QBE): equal, M30
 - Stocking Type (QBE): equal, P
 - Plan Fmly (QBE): equal, 200
 - Supplier Number (QBE): <, 1
- Additional Fields Selection:

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

The screenshot shows the 'Watchlist Manager' window with the following configuration:

- Name:** (Create) [dropdown]
- Description:** [empty text box]
- Threshold Type:** Ascending, Descending
- Warning Threshold:** [empty text box]
- Critical Threshold:** [empty text box]
- Advanced Options:** [expanded]
- Query to be Used:** * test1 [dropdown]
- Query Details:**

Match all of the following:

• Branch/Plant (QBE)	equal	M30
• Stocking Type (QBE)	equal	P
• Plan Fmly (QBE)	equal	200
• Supplier Number (QBE)	<	1

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 onview 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.

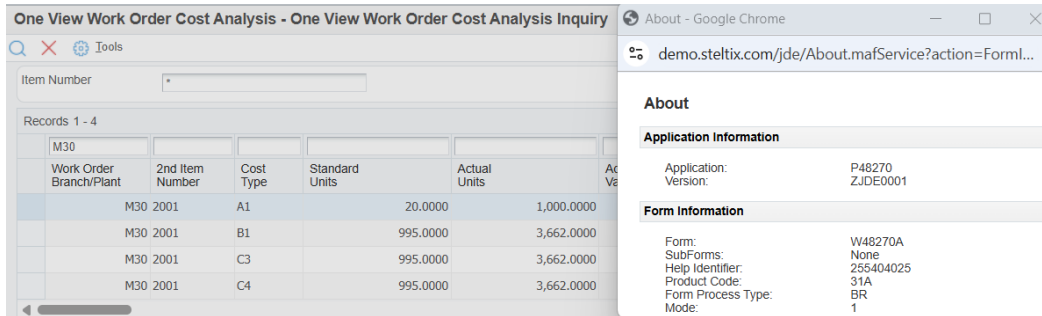
Technology used: UDO watchlist.

Limitations: Ensure you have security access to run this application

Table/Application Used: P48270

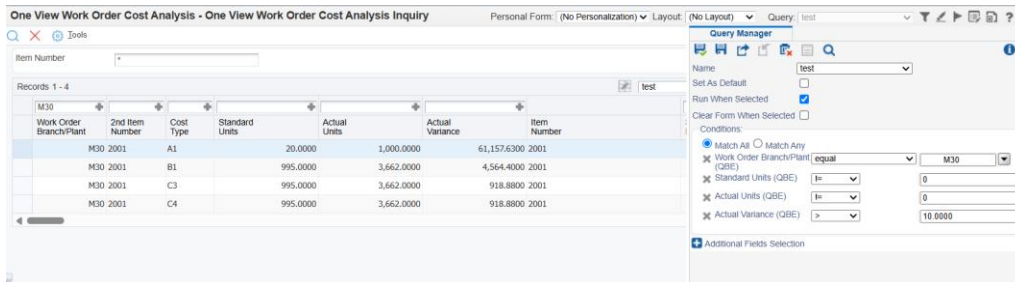
Step 1

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

Query Manager

Name: test

Set As Default:

Run When Selected:

Clear Form When Selected:

Conditions:

Match All Match Any

Work Order Branch/Plant (QBE) equal M30

Standard Units (QBE) != 0

Actual Units (QBE) != 0

Actual Variance (QBE) > 10.0000

+ Additional Fields Selection

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

The screenshot shows the 'Watchlist Manager' window with the following configuration:

- Name:** (Create) [dropdown]
- Description:** [text area]
- Threshold Type:** Ascending Descending
- Warning Threshold:** [text input]
- Critical Threshold:** [text input]
- Advanced Options:** [expanded]
- Query to be Used:** * test [dropdown]
- Query Details:** Match all of the following:

• Work Order Branch/Plant (QBE)	equal	M30
• Standard Units (QBE)	!=	0
• Actual Units (QBE)	!=	0
• Actual Variance (QBE)	>	10.0000

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

The screenshot shows the 'One View Work Order Cost Analysis - One View Work Order Cost Analysis Inquiry' application. The main window displays a table with the following data:

Work Order Branch/Plant	2nd Item Number	Cost Type	Standard Units	Actual Units	Actual Variance
M30					
M30 2001	A1		20.0000	1,000.0000	
M30 2001	B1		995.0000	3,662.0000	
M30 2001	C3		995.0000	3,662.0000	
M30 2001	C4		995.0000	3,662.0000	

An 'About' dialog box is open on the right, displaying the following information:

About

Application Information

Application: P48270
Version: ZJDE0001

Form Information

Form: W48270A
SubForms: None
Help Identifier: 255404025
Product Code: 31A
Form Process Type: BR
Mode: 1

Step 2

Populate some QBE values and create a new query

The screenshot shows the 'One View Work Order Cost Analysis - One View Work Order Cost Analysis Inquiry' application. The main window displays a table with the following data:

Work Order Branch/Plant	2nd Item Number	Cost Type	Standard Units	Actual Units	Actual Variance	Standard Amount	Actual Amount	Current Amount	Planned Amount
M30	2001	A1	>1.0000						
M30 2001	A1		10.0000			1,201.3170			1,876.2020
M30 2001	A1		167.0000		61,157.6300	20,061.9939			31,321.0339
M30 2001	A1		1,000.0000			120,131.7000			117,194.6400
M30 2001	A1		1,000.0000	1,000.0000		120,131.7000	139,237.3900		117,194.6400
M30 2001	A1		20.0000	1,000.0000	61,157.6300	2,402.6000	139,237.3900	2,343.8000	78,079.7600

Bigger view of the query manager

Query Manager

Name: test

Set As Default:

Run When Selected:

Clear Form When Selected:

Conditions:

Match All Match Any

Work Order Branch/Plant (QBE)	equal	M30
Standard Units (QBE)	!=	0
WO St (QBE)	less than	97
Standard Amount (QBE)	>=	2,000.0000
Planned Amount (QBE)	=	2,000.0000

Additional Fields Selection

+ % Cmp (QBE)

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

The screenshot shows the 'Watchlist Manager' window with the following configuration:

- Name:** (Create) [dropdown]
- Description:** [empty text box]
- Threshold Type:** Ascending Descending
- Warning Threshold:** [empty text box]
- Critical Threshold:** [empty text box]
- Advanced Options:** [expanded]
- Query to be Used:** * test [dropdown]
- Query Details:** Match all of the following:

• Work Order Branch/Plant (QBE)	equal	M30
• Standard Units (QBE)	!=	0
• WO St (QBE)	less than	97
• Standard Amount (QBE)	>=	2,000.0000
• Planned Amount (QBE)	=	2,000.0000

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

The screenshot shows the 'One View Work Order Cost Analysis - One View Work Order Cost Analysis Inquiry' application. The main window displays a table with the following data:

Work Order Branch/Plant	2nd Item Number	Cost Type	Standard Units	Actual Units	Actual Variance
M30					
M30 2001	A1		20.0000	1,000.0000	
M30 2001	B1		995.0000	3,662.0000	
M30 2001	C3		995.0000	3,662.0000	
M30 2001	C4		995.0000	3,662.0000	

An 'About' dialog box is open on the right, displaying the following information:

About

Application Information

Application: P48270
Version: ZJDE0001

Form Information

Form: W48270A
SubForms: None
Help Identifier: 255404025
Product Code: 31A
Form Process Type: BR
Mode: 1

Step 2

Populate some QBE values and create a new query

The screenshot shows the 'One View Work Order Cost Analysis - One View Work Order Cost Analysis Inquiry' application with a more detailed table. The table has the following columns: Work Order Branch/Plant, 2nd Item Number, Cost Type, Standard Units, Actual Units, Actual Variance, Standard Amount, Actual Amount, Current Amount, and Planned Amount. The data is as follows:

Work Order Branch/Plant	2nd Item Number	Cost Type	Standard Units	Actual Units	Actual Variance	Standard Amount	Actual Amount	Current Amount	Planned Amount
M30	2001	A1	>1.0000						
M30 2001	A1		10.0000			1,201.3170		1,876.2020	
M30 2001	A1		167.0000		61,157.6300	20,061.9939		31,321.0339	
M30 2001	A1		1,000.0000			120,131.7000		117,194.6400	127,843.2200
M30 2001	A1		1,000.0000	1,000.0000		120,131.7000	139,237.3900	117,194.6400	127,843.2200
M30 2001	A1		20.0000	1,000.0000	61,157.6300	2,402.6000	139,237.3900	2,343.8000	78,079.7600

Bigger view of the query manager

Query Manager

Name: test

Set As Default:

Run When Selected:

Clear Form When Selected:

Conditions:

Match All Match Any

<input checked="" type="checkbox"/> Work Order Branch/Plant (QBE)	equal	M30
<input checked="" type="checkbox"/> Standard Units (QBE)	!=	0
<input checked="" type="checkbox"/> WO St (QBE)	less than	97
<input checked="" type="checkbox"/> Standard Amount (QBE)	>=	2,000.0000
<input checked="" type="checkbox"/> Current Amount (QBE)	>=	2,000.0000
<input checked="" type="checkbox"/> Cost Type (QBE)	equal	A1

+ Additional Fields Selection

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

The screenshot shows the 'Watchlist Manager' window with the following configuration:

- Name:** A dropdown menu.
- Description:** A large empty text area.
- Threshold Type:** Radio buttons for 'Ascending' (selected) and 'Descending'.
- Warning Threshold:** An empty input field.
- Critical Threshold:** An empty input field.
- Advanced Options:** A dropdown menu for 'Query to be Used' with the value 'test' selected.
- Query Details:** A list of conditions to match:

Field	Operator	Value
Work Order Branch/Plant (QBE)	equal	M30
Standard Units (QBE)	!=	0
WO St (QBE)	less than	97
Standard Amount (QBE)	>=	2,000.0000
Current Amount (QBE)	>=	2,000.0000

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.

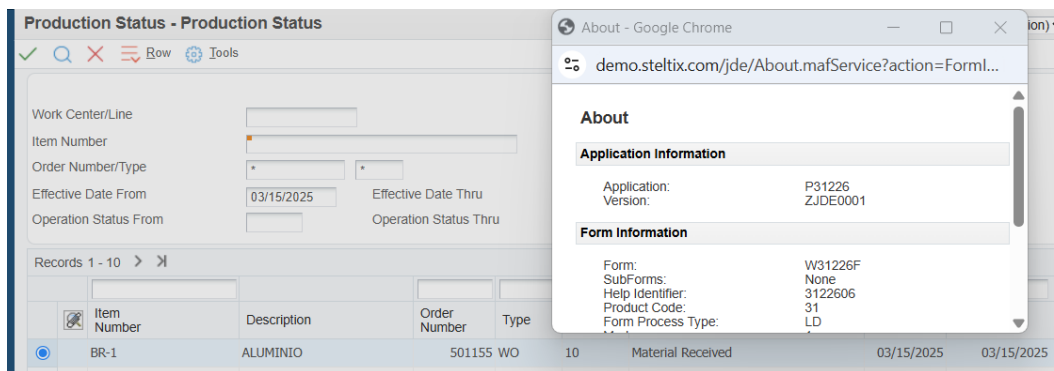
Technology used: Watch list

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 exist, 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

Production Status - Production Status Personal Form: (No Personalization) Layout: (No Layout)

Work Center/Line: Branch/Plant:

Item Number:

Order Number/Type:

Effective Date From: Effective Date Thru:

Operation Status From: Operation Status Thru:

Records 1 - 3

Item Number	Description	Work Center	Quantity at Operation	Order Number	Type	Op St	Operation Status	Start Date	Request Date	Oper Seq
220	Touring Bike, Red	200-201	>1.00	10.00	500401	WO	Waiting for Assignment	03/17/2025	03/31/2025	10.00
220	Touring Bike, Red	200-201	10.00	500857	WO	Waiting for Assignment	03/27/2025	03/31/2025	10.00	

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.

Query Manager

Name: (Create) ▾

Set As Default:

Run When Selected:

Clear Form When Selected:

Conditions:

Match All Match Any

<input checked="" type="checkbox"/> Work Center (QBE)	in list ▾	▾
<input checked="" type="checkbox"/> Item Number (QBE)	equal ▾	220 ▾
<input checked="" type="checkbox"/> Quantity at Operation (QBE)	> ▾	1.00
<input checked="" type="checkbox"/> Start Date (QBE)	<= ▾	Today minus 7 days ▾
<input checked="" type="checkbox"/> Request Date (QBE)	<= ▾	Today minus 7 days ▾
<input checked="" type="checkbox"/> Oper Seq (QBE)	= ▾	1.00
<input checked="" type="checkbox"/> Op St (QBE)	is blank ▾	
<input checked="" type="checkbox"/> Branch (QBE)	equal ▾	M30 ▾

Additional Fields Selection

- 3rd Item Number (QBE)
- Address Number (QBE)

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

The screenshot shows the 'One View Work Order Cost Analysis - One View Work Order Cost Analysis Inquiry' application. The main window displays a table with the following data:

Work Order Branch/Plant	2nd Item Number	Cost Type	Standard Units	Actual Units
M30 2001	A1		20.0000	1,000.0000
M30 2001	B1		995.0000	3,662.0000
M30 2001	C3		995.0000	3,662.0000
M30 2001	C4		995.0000	3,662.0000

The 'About' dialog box is open, showing the following information:

- Application Information:**
 - Application: P48270
 - Version: ZJDE0001
- Form Information:**
 - Form: W48270A
 - SubForms: None
 - Help Identifier: 255404025
 - Product Code: 31A
 - Form Process Type: BR
 - Mode: 1

Step 2

Populate some QBE values and create a new query

The screenshot shows the 'One View Work Order Cost Analysis - One View Work Order Cost Analysis Inquiry' application with a more detailed table view. The table includes the following data:

Work Order Branch/Plant	2nd Item Number	Cost Type	Standard Units	Actual Units	Actual Variance	Standard Amount	Actual Amount	Current Amount	Planned Amount
M30 2001	A1		10.0000			1,201.3170		1,876.2020	
M30 2001	A1		167.0000		61,157.6300	20,061.9939		31,321.0339	
M30 2001	A1		1,000.0000			120,131.7000		117,194.6400	127,843.2200
M30 2001	A1		1,000.0000	1,000.0000		120,131.7000	139,237.3900	117,194.6400	127,843.2200
M30 2001	A1		20.0000	1,000.0000	61,157.6300	2,402.6000	139,237.3900	2,343.8000	78,079.7600

A 'test' button is visible in the top right corner of the table area.

Bigger view of the query manager

Query Manager

Name: test

Set As Default:

Run When Selected:

Clear Form When Selected:

Conditions:

Match All Match Any

Work Order Branch/Plant (QBE) equal M30

Standard Units (QBE) != 0

WO St (QBE) less than 97

Standard Amount (QBE) >= 2,000.0000

Current Amount (QBE) >= 2,000.0000

Cost Type (QBE) equal A1

+ Additional Fields Selection

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

The screenshot shows the 'Watchlist Manager' window with the following configuration:

- Name:** A dropdown menu.
- Description:** A large empty text area.
- Threshold Type:** Radio buttons for 'Ascending' (selected) and 'Descending'.
- Warning Threshold:** An empty input field.
- Critical Threshold:** An empty input field.
- Advanced Options:** A dropdown menu for 'Query to be Used' with the value 'test' selected.
- Query Details:** A list of conditions to match:

Field	Operator	Value
Work Order Branch/Plant (QBE)	equal	M30
Standard Units (QBE)	!=	0
WO St (QBE)	less than	97
Standard Amount (QBE)	>=	2,000.0000
Current Amount (QBE)	>=	2,000.0000

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

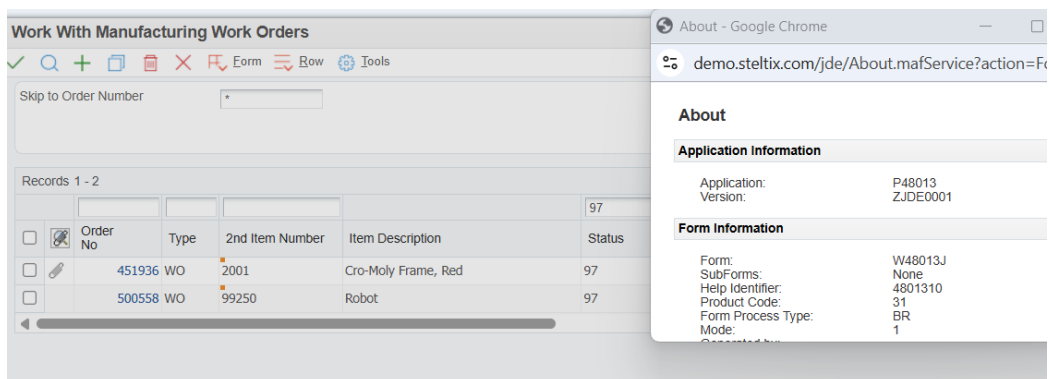
Technology used: UDO watchlist.

Limitations: Ensure you have security access to run this application

Table/Application Used: P48013

Step 1

Open Workorder entry application



The screenshot displays a web application interface for 'Work With Manufacturing Work Orders'. The main area shows a table with columns for Order No, Type, 2nd Item Number, Item Description, and Status. Two records are visible: one for order 451936 (WO) with item 2001 (Cro-Moly Frame, Red) and status 97, and another for order 500558 (WO) with item 99250 (Robot) and status 97. An 'About' dialog box is open on the right, showing application and form information.

Order No	Type	2nd Item Number	Item Description	Status
451936	WO	2001	Cro-Moly Frame, Red	97
500558	WO	99250	Robot	97

About

Application Information

Application:	P48013
Version:	ZJDE0001

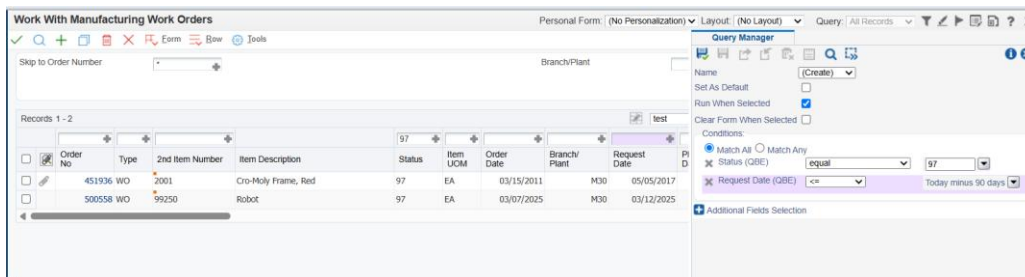
Form Information

Form:	W48013J
SubForms:	None
Help Identifier:	4801310
Product Code:	31
Form Process Type:	BR
Mode:	1

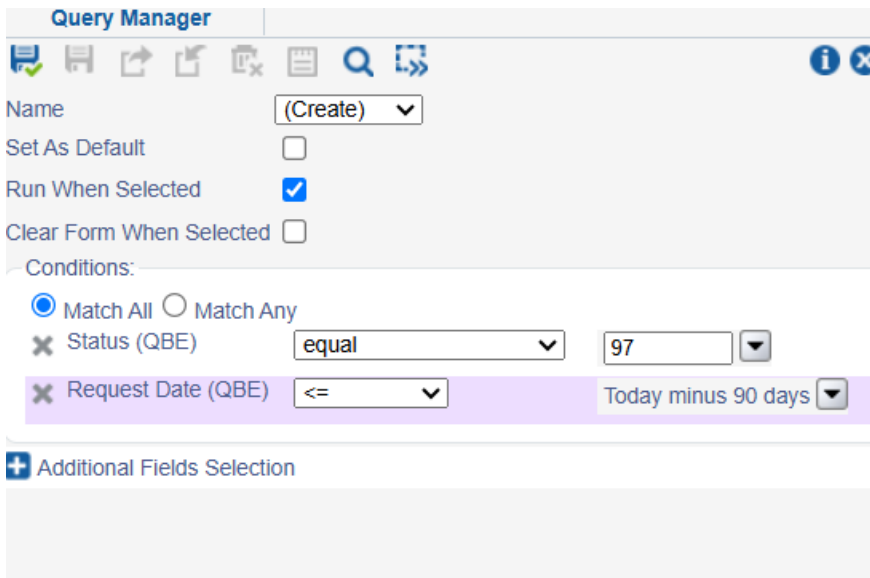
Step 2

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.

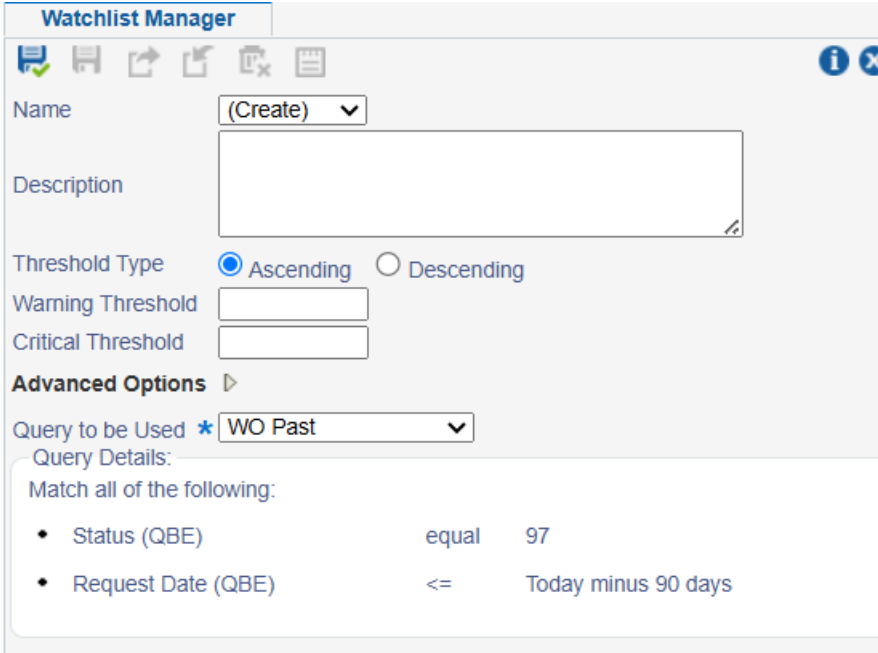


Right pane repeated for clarity view



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



The screenshot shows the 'Watchlist Manager' window with the following configuration:

- Name:** (Create) [dropdown]
- Description:** [empty text box]
- Threshold Type:** Ascending Descending
- Warning Threshold:** [empty text box]
- Critical Threshold:** [empty text box]
- Advanced Options:** [expanded]
- Query to be Used:** * WO Past [dropdown]
- Query Details:**
 - Match all of the following:
 - Status (QBE) equal 97
 - Request Date (QBE) <= Today minus 90 days

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.

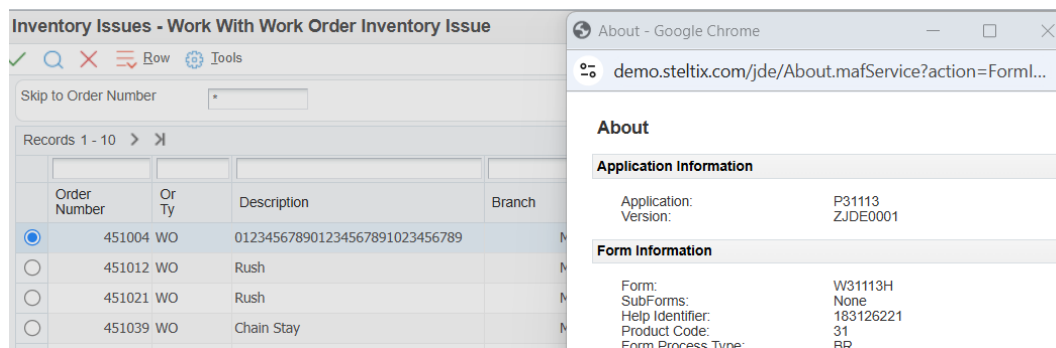
Technology used: Watch list

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 exist, 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



The screenshot displays a web application interface. On the left, a table titled 'Inventory Issues - Work With Work Order Inventory Issue' is visible. The table has columns for 'Order Number', 'Or Ty', 'Description', and 'Branch'. The first row is selected, showing '451004 WO' and '012345678901234567891023456789'. Below the table, there is a search bar labeled 'Skip to Order Number' and a record count 'Records 1 - 10'. On the right, a browser window titled 'About - Google Chrome' is open, displaying the 'About' page for the application. The page shows 'Application Information' with 'Application: P31113' and 'Version: ZJDE0001'. Below that, 'Form Information' is shown with 'Form: W31113H', 'SubForms: None', 'Help Identifier: 183126221', 'Product Code: 31', and 'Form Process Type: BR'.

Order Number	Or Ty	Description	Branch
451004	WO	012345678901234567891023456789	
451012	WO	Rush	
451021	WO	Rush	
451039	WO	Chain Stay	

About

Application Information

Application: P31113
Version: ZJDE0001

Form Information

Form: W31113H
SubForms: None
Help Identifier: 183126221
Product Code: 31
Form Process Type: BR

Step 2

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

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
<input checked="" type="radio"/>	451442	WO	Vitamin A	M30	4201	50.00	4.20	>.01	.23 GM
<input type="radio"/>	451928	WO	Cro-Moly Frame, Red	M30	2001	10.00	9.75		.20 EA
<input type="radio"/>	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.

Query Manager

Save Refresh Copy Paste Print Search Help

Name: (Create) ▾

Set As Default:

Run When Selected:

Clear Form When Selected:

Conditions:

Match All Match Any

✕ Branch (QBE)	equal ▾	M30 ▾
✕ Quantity Scrapped (QBE)	> ▾	.01
✕ Request Date (QBE)	= ▾	▾
✕ 2nd Item Number (QBE)	equal ▾	▾

+ Additional Fields Selection

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.

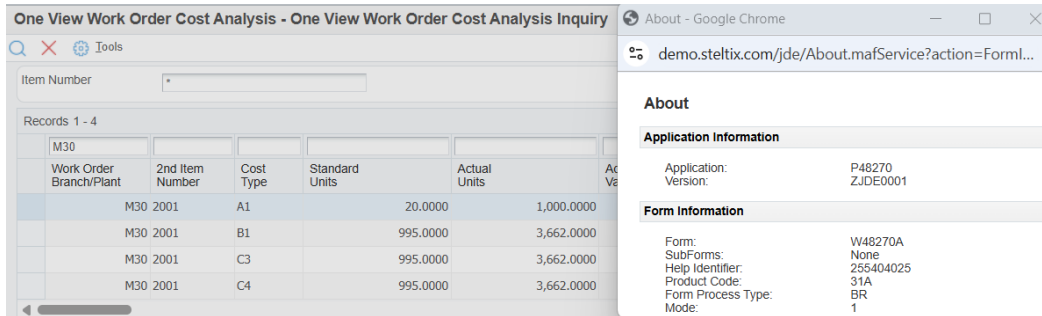
Technology used: UDO watchlist.

Limitations: Ensure you have security access to run this application

Table/Application Used: P48270

Step 1

Open One View WO cost analysis inquiry application

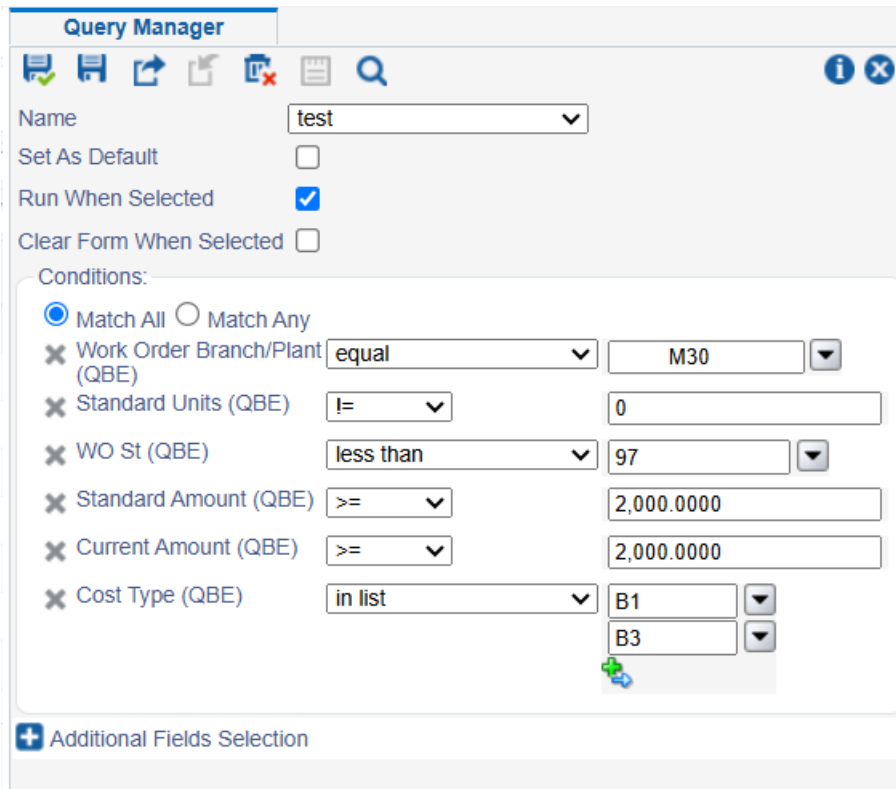


Step 2

Populate some QBE values and create a new query

Work Order Branch/Plant	2nd Item Number	Cost Type	Standard Units	Actual Units	Actual Variance	Standard Amount	Actual Amount	Current Amount	Planned Amount
M30 2001	A1		10.0000			1,201.3170		1,876.2020	
M30 2001	A1		167.0000		61,157.6300	20,061.9939		31,321.0339	
M30 2001	A1		1,000.0000			120,131.7000		117,194.6400	127,843.2200
M30 2001	A1		1,000.0000	1,000.0000		120,131.7000	139,237.3900	117,194.6400	127,843.2200
M30 2001	A1		20.0000	1,000.0000	61,157.6300	2,402.6000	139,237.3900	2,343.8000	78,079.7600

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

Watchlist Manager

Name

Description

Threshold Type Ascending Descending

Warning Threshold

Critical Threshold

Advanced Options ▸

Query to be Used *

Query Details:

Match all of the following:

• Work Order Branch/Plant (QBE)	equal	M30
• Standard Units (QBE)	!=	0
• WO St (QBE)	less than	97
• Standard Amount (QBE)	>=	2,000.0000
• Current Amount (QBE)	>=	2,000.0000
• Cost Type (QBE)	in list	B1 B3

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

The screenshot shows the 'One View Work Order Cost Analysis - One View Work Order Cost Analysis Inquiry' application. The main window displays a table with the following data:

Work Order Branch/Plant	2nd Item Number	Cost Type	Standard Units	Actual Units	Actual Variance
M30					
M30 2001	A1		20.0000	1,000.0000	
M30 2001	B1		995.0000	3,662.0000	
M30 2001	C3		995.0000	3,662.0000	
M30 2001	C4		995.0000	3,662.0000	

An 'About' dialog box is open on the right, showing the following information:

About

Application Information

Application: P48270
Version: ZJDE0001

Form Information

Form: W48270A
SubForms: None
Help Identifier: 235404025
Product Code: 31A
Form Process Type: BR
Mode: 1

Step 2

Populate some QBE values and create a new query

The screenshot shows the 'One View Work Order Cost Analysis - One View Work Order Cost Analysis Inquiry' application with a more detailed table. The table has the following columns: Work Order Branch/Plant, 2nd Item Number, Cost Type, Standard Units, Actual Units, Actual Variance, Standard Amount, Actual Amount, Current Amount, and Planned Amount. The data is as follows:

Work Order Branch/Plant	2nd Item Number	Cost Type	Standard Units	Actual Units	Actual Variance	Standard Amount	Actual Amount	Current Amount	Planned Amount
M30	2001	A1	>1.0000						
M30 2001	A1		10.0000			1,201.3170			1,876.2020
M30 2001	A1		167.0000		61,157.6300	20,061.9939			31,321.0339
M30 2001	A1		1,000.0000			120,131.7000			117,194.6400
M30 2001	A1		1,000.0000	1,000.0000		120,131.7000	139,237.3900		117,194.6400
M30 2001	A1		20.0000	1,000.0000	61,157.6300	2,402.6000	139,237.3900	2,343.8000	78,079.7600

Bigger view of the query manager

Query Manager

Name: test

Set As Default:

Run When Selected:

Clear Form When Selected:

Conditions:

Match All Match Any

- Work Order Branch/Plant (QBE) equal M30
- Standard Units (QBE) != 0
- WO St (QBE) less than 97
- Standard Amount (QBE) >= 2,000.0000
- Current Amount (QBE) >= 2,000.0000
- Cost Type (QBE) in list C3, C4

+ Additional Fields Selection

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

Watchlist Manager

Name

Description

Threshold Type Ascending Descending

Warning Threshold

Critical Threshold

Advanced Options ▾

Query to be Used *

Query Details:

Match all of the following:

• Work Order Branch/Plant (QBE)	equal	M30
• Standard Units (QBE)	!=	0
• WO St (QBE)	less than	97
• Standard Amount (QBE)	>=	2,000.0000
• Current Amount (QBE)	>=	2,000.0000
• Cost Type (QBE)	in list	C3 C4

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

Order Type (DCTO)	`\${szOrdertype}`
Order Company (Order Number) (KCO)	`\${szCompanykeyordemo}`

Action List Get Text Add Update Text Upload File Download File Delete

Input

* Sequence

Item Name

Text Action Append Replace

Append On New Line

Plain Text

← → ↺ Paragraph **B** *I* U ~~S~~ x_2 x^2 *I_x*

`\${updatetextseq}`

Adding business cross reference example

Records 1 - 2

<input type="checkbox"/>	Cross Reference Type	Cross Reference Object Type	Third Party App ID	Third Party Value	EOne Value
<input type="radio"/>	AIS	ADDRESS	3PARTYID	7890	61516
<input checked="" type="radio"/>					

About

Application Information

Application: P952000
Version:

Form Information

Form: W952000A
SubForms: None
Help Identifier: 1896731145
Product Code: H95
Form Process Type: LD
Mode: 1

Watchlist within Orchestrator Example

Home > White Lists > White Lists > untitled

Name: WLST_MR260310_WHITELISTFORADDRESS

Description: WLST_MR260310_WHITELISTFORADDRESS

Object Type: ADDRESS - ADDRESS

Input Key

- 7890

Order Type (DCTO)	`\${szOrdertype}`
Order Company (Order Number) (KCO)	`\${szCompanykeyordemo}`

Action List Get Text Add Update Text Upload File Download File Delete

Input

* Sequence

Item Name

Text Action Append Replace

Append On New Line

Plain Text

Rich text editor toolbar: Paragraph, Bold, Italic, Underline, Strikethrough, x₂, x², Link, Unlink, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo, Search, Refresh.

Rich text editor content: `\${updatetextseq}`

Logic attached to Form Extension Example

Home > Logic Extensions > Logic Extensions > LGEX_MR260323_UPDATEDDELIVERYDATE

Name: **LGEX_MR260323_UPDATEDDELIVERYDATE** Product Code: 55 - Resi

Description: LGEX_MR260323_UPDATEDDELIVERYDATE Category:

ID	Name	Dictionary	Data Type	Required	IO Type	Output Variable
1	NUMBEROFDAYS	INT01	Integer	<input type="checkbox"/>	Input Only	
2	REQUESTEDDATE	DRQJ	Date	<input type="checkbox"/>	Input Only	
3	PROMISEDELIVERYDATE	RSDJ	Date	<input type="checkbox"/>	Output Only	PROMISEDELIVERYDATE

+ Data Dictionary + Boolean + Array + Add Control



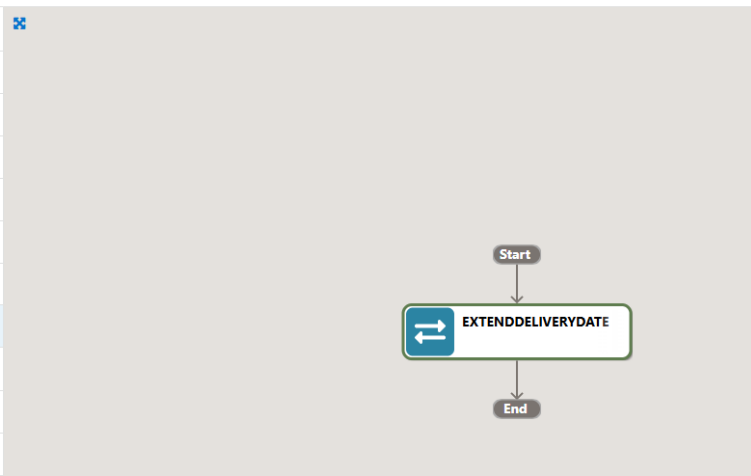
Name **LGEX_MR260323_UPDATEDDELIVERYDATE**

Product Code 55

Description LGEX_MR260323_UPDATEDDELIVERYDATE

Category

- Assignment
- Array Function
- If Else
- Switch
- While
- Table I/O
- Aggregation
- Business Function**
- Logic Extension
- Report
- Workflow



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

Select Event

2

Select
Orchestration

3

Define Inputs

4

Execution

5

Define Outputs

Associate Orchestration with Event :

Control

Purchase Order Workbench

Event

Post Dialog is Initialized



Saved Orchestration :

Orchestrations

Notifications

Logic Extensions

No saved Orchestrations.

Cancel

Next

Close

Associate Logic Extensions ✕

1 2 3 4 5

Select Event **Select Logic Extension** Define Inputs Execution Define Outputs

Logic Extension Name : _____

Select Logic Extension

Logic Extensions

Personal

- LGEX_MR260310_DISABLEFORM
- LGEX_MR260323_UPDATEDELIVERYDATE

Cancel Back Next Close

Associate Logic Extensions ✕

✓ — ✓ — 3 — 4 — 5

Select Event
Select Logic Extension
Define Inputs
Execution
Define Outputs

Define Inputs

Name	Mapping Input	Default Value	Allow Empty	Allow Input
<i>NUMBEROFDAY</i>	<i>Click Input Field</i>		<input type="checkbox"/>	<input type="checkbox"/>
<i>REQUESTEDDA</i>	<i>Click Input Field</i>		<input type="checkbox"/>	<input type="checkbox"/>

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

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

Home > Logic Extensions > Logic Extensions > untitled

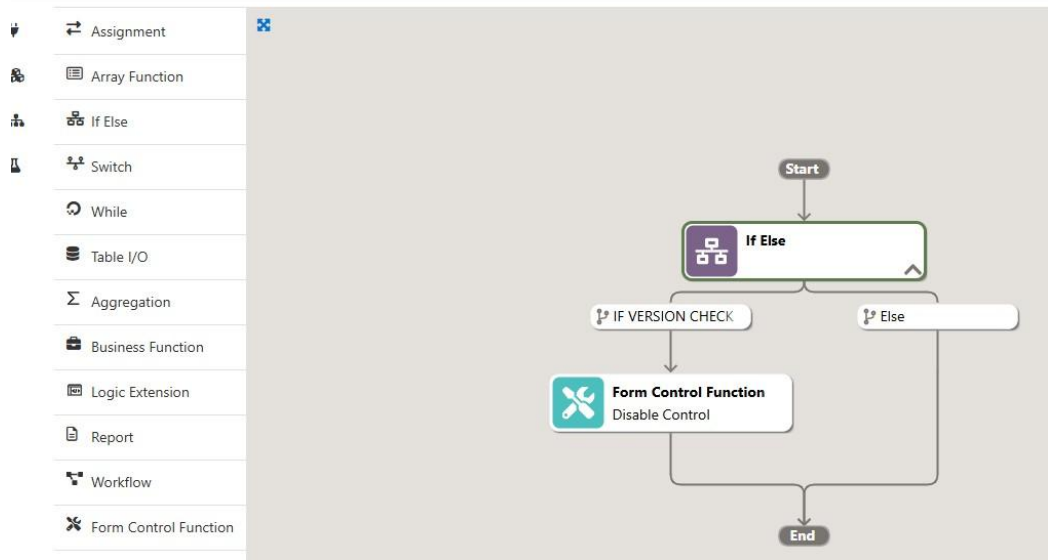
Name: LGEX_MR260310_DISABLEFORM Product Code: 55 - Reserved for Clients

Description: LGEX_MR260310_DISABLEFORM Category:

ID	Name	Dictionary	Data Type	Required	IO Type	Output Variable
1	Version	VERS	String	<input type="checkbox"/>	Input Only	
2	Control2		Form Control List	<input type="checkbox"/>		

+ Data Dictionary + Boolean + Array + Add Control

Name **LGEX_MR260310_DISABLEFORM** Product Code 55
 Description LGEX_MR260310_DISABLEFORM Category



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 form 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.

Item/Branch Plant Info.

✓ ✕ ⚙ Form ⚙ Tools

Branch/Plant * 10
Item Number 2300 Water Bottle

Basic Branch/Plant Data Additional Info. Lot Processing

Stocking Type	<input type="text" value="P"/>	<i>Purchased inc. Raw Material</i>	Sales Taxable	<input type="text" value="Y"/>
G/L Class	<input type="text" value="IN30"/>	<i>Manufactured Finished Go...</i>	Purchasing Taxable	<input type="text" value="N"/>
Line Type	<input type="text" value="S"/>	Stock Inventory Item	<input checked="" type="checkbox"/> Check Availability	
Planner Number	<input type="text"/>		<input checked="" type="checkbox"/> Backorders Allowed	
Buyer Number	<input type="text"/>			
Supplier Number	<input type="text" value="4343"/>	Parts Emporium		
Print Message	<input type="text"/>			
Commitment Method	<input type="text" value="1"/>	<i>Location With Most Quantity</i>		
Country of Origin	<input type="text"/>	<i>Default Country</i>		

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:


Name **MSRQ_MR260307_Send Credit Message**

Description

To Address Book

Cc

Bcc

 Preview

Subject

Plain Text

Placeholder Paragraph **B** *I* U ~~S~~ x_2 x^2 *I_x* | @

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)	

Scheduler example

Name: SCHD_MR260308 EVERY5MIN


Description: SCHD_MR260308 EVERY5MIN

Purpose:

My Subscriptions

[+ Add Subscription](#) Close

Show

 **NOTF_MR260308_WATCHLISTNOTIFY**
NOTF_MR260308_WATCHLISTNOTIFY

Configuration

Notification Name: NOTF_MR260308_WATCHLISTNOTIFY
Notification Description: NOTF_MR260308_WATCHLISTNOTIFY
Subscription Name:
Message Heading:

Delivery Methods:

Notification List Category: Share

Work Center

Email

Inputs

Not applicable

Policy

Notify me

Watchlist notification within orchestrator example

Name: NOTF_MR260308_WATCHLISTNOTIFY

Description: NOTF_MR260308_WATCHLISTNOTIFY

Purpose:

Name	NOTF_MR260308_WATCHLISTNOTIFY
Description	NOTF_MR260308_WATCHLISTNOTIFY

Type Watchlist Run As Subscriber Allow Subscriber Overrides Test

▶ Notification Inputs

▲ Watchlist

🔍 Select Watchlist WTL_MR260308_QTY100

TEST

▶ Rule

Message

Output Watchlist Output Output Type Watchlist

Subject

Body Plain Text

Placeholder Paragraph **B** *I* U ~~S~~ x₂ x² *I*_x

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)	<input type="checkbox"/>	▼
9	Ordertype	Order Type (DCTO)	<input type="checkbox"/>	▼

Schedule

Select Schedule SCHD_MR260308 EVERY5MIN



5 MIN

Name: SCHD_MR260308 EVERY5MIN

Description: SCHD_MR260308 EVERY5MIN

Purpose:

Home > Schedules > SCHD_MR260308 EVERY5MIN



Name SCHD_MR260308 EVERY5MIN

Description 5 MIN

Scheduled to run every

5 Minutes

Or Enter a Cron String

Report download example

Name: RPRQ_MR260308_download

Description: rprq_mr260308_download

Purpose:



Name **RPRQ_MR260308_download**


Description **rprq_mr260308_download**

Execute Report Download Existing Report

* Job Number

* Execution Server

* File Type

Overwrite Existing File 

Keep Temp Files 

File Name Variable

File Name Override

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	Search	Sales Order Header File	Load	Get
Filter:	Type to filter	x	Options		

Description	Data Dictionary						
Order Co	KCOO	⌵	⏪	Σ	📊	👤	⋮
Order Number	DOCO	⌵	⏪	Σ	📊	👤	⋮
Or Ty	DCTO	⌵	⏪	Σ	📊	👤	⋮
Ord Suf	SFXO	⌵	⏪	Σ	📊	👤	⋮
Business Unit	MCU	⌵	⏪	Σ	📊	👤	⋮
Co	CO	⌵	⏪	Σ	📊	👤	⋮
Doc Co	OKCO	⌵	⏪	Σ	📊	👤	⋮

Filter Criteria

Incl

Match Type Match All Match Any

	Description	Operator	Values		
☰	Address Number	=	▼	\$(CUSTOMER) ▼	✕
☰	Order Date	<=	▼	Today ▼	▼ ✕

Aggregations

Include 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	Q	Credit Granting Inquiry	Load	Get
Filter:	Type to filter	x	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		✕

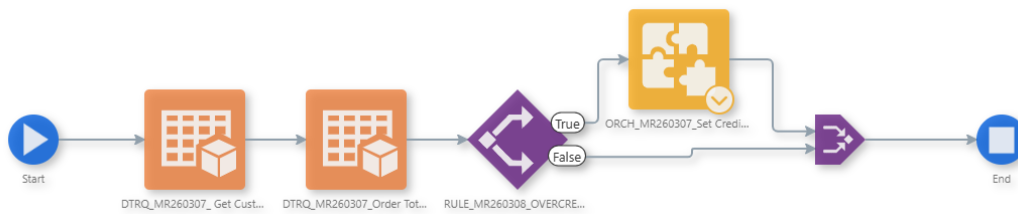
Order By

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		<input type="checkbox"/>	
		String		<input type="checkbox"/>	

Data Request

Name **DTRQ_MR260307_Get Customer Credit Limit**

Description **Retrieve Customer Credit Limit**

Table/View Name V03012F Credit Granting Inquiry

[Load](#)

Filter: × Options

Description	Data Dictionary						
Address Number [F0101]	AN8			Σ			
Address Number [F03012]	AN8			Σ			
Co [F03012]	CO			Σ			
Credit Limit [F03012]	ACL			Σ			
T C [F03012]	TSTA			Σ			

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 Load

Filter: × Options

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

Filter Criteria

Include Empty

Match Type Match All Match Any

Description	Operator	Values		
Address Number	=	\$(CUSTOMER)		
Order Date	<=	Today		

Aggregations

Include 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

Match Type

Rule Type	Value 1	Operator	Literal	Value 2
Numeric	OpenOrderAmt	>	<input type="checkbox"/>	CreditLimit
		=	<input type="checkbox"/>	

Transformations

RULE_MR260308

Auto Map Iterate Over Add Inputs to Orches

Input	Available Values	Default Value
OpenOrderAmt	TOTAL ORDER AMOUNT	
CreditLimit	Credit Limit	



Name **ORCH_MR260307_Set Credit Hold**

Description

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	<input checked="" type="checkbox"/>
DTRQ_MR260307_Get Customer Credit Limit				
	From Cache	From Cache	Boolean	<input checked="" type="checkbox"/>
	Milliseconds in Cache	Milliseconds in Cache	Numeric	<input checked="" type="checkbox"/>
Data Browser - V03012F [Credit Granting Inquiry]	Return All Grid Rows <input checked="" type="checkbox"/>	DTRQ_MR260307_Get Custor	Rows Only <input checked="" type="checkbox"/>	☰
	Credit Limit [F03012]-F03012.ACL	Credit Limit [F03012]	Numeric	<input checked="" type="checkbox"/>
	Alpha Name [F0101]-F0101.ALPH	Alpha Name [F0101]	String	<input checked="" type="checkbox"/>
DTRQ_MR260307_Order Totals				
	From Cache	From Cache	Boolean	<input checked="" type="checkbox"/>

Form Request Example

Name: FMRQ_MR260308_CREATE NEW VENDOR

Description: FMRQ_MR260308_CREATE NEW VENDOR

Purpose:

Name **FMRQ_MR260308_CREATE NEW VENDOR** Product Code 55

Description FMRQ_MR260308_CREATE NEW VENDOR Category

Form Request Options **Add Form:** << First < Before > After >> Last ☰ × Remo

1 Work With Addresses 2 Address Book Revision 3 Work With Addresses

Order of Execution

Description	ID	Action	Input	Default Value	
☰ Address Number	1[19]	SetQBValue	Address_Number		▼ ×
☰ Find	15	DoAction			×
☰ Select Row <input type="checkbox"/> Filter	1.0	SelectRow	Select_Row	1	▼ ×
☰	24	DoAction			×

Available Actions

Description	ID	Return	Variable
▶ Button and Exits			
Alpha Name	58	<input type="checkbox"/>	
Display Address	63	<input type="checkbox"/>	
Display Phone	62	<input type="checkbox"/>	
Search Type	54	<input type="checkbox"/>	
▶ Work With Addresses - QBE			
▶ Work With Addresses - Grid	1		


Name

Description

To Address Book

Cc Email Address

Bcc

 Preview

Subject

Plain Text

Placeholder **B** *I* U ~~S~~ x_2 x^2

MSRQ_MR260308_CREATE NEW VENDOR

{P01012.Link}

▲ Links - 1

▲ Application Links - 1

+ Add

▲ Address Book Revision

Application Link ID: P01012

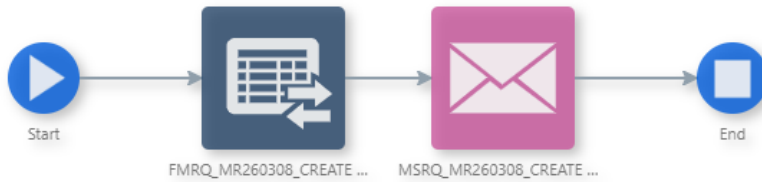
Application: P01012 Version Variable

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** Product Code

Description Category

Form Request Options

Add Form: << First < Before > After >> Last

1

2

Work With Non Stock Items

Non Stock Item Revisions

Order of Execution

Description	ID	Action	Input	Default Value
Add	15	DoAction		

1

2

Work With Non Stock Items

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

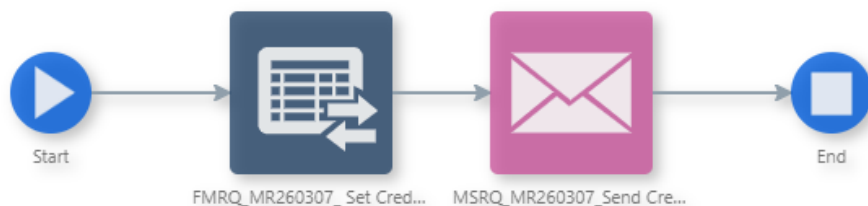
Auto Map Iterate Over Return Raw Output Add Inputs to Or

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	
<input type="checkbox"/>	Address_Number		String		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>			String		<input type="checkbox"/>	

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	
☰ Address Number	1[19]	SetQBValue	Address_Number		✕
☰ Find	15	DoAction			✕
☰ Select Row <input type="checkbox"/> Filter	1.0	SelectRow		1	✕
☰ A/R	68	DoAction			✕

Transformations

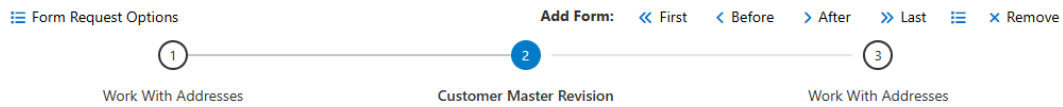
FMRQ_MR260307_Set Credit Hold
Form Request

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	<input type="checkbox"/>	
Display Address	63	<input type="checkbox"/>	
Display Phone	62	<input type="checkbox"/>	
Search Type	54	<input type="checkbox"/>	
▶ Work With Addresses - QBE			
▶ Work With Addresses - Grid	1		



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	<input type="checkbox"/>		+
Display Address	63	<input type="checkbox"/>		+
Display Phone	62	<input type="checkbox"/>		+
Search Type	54	<input type="checkbox"/>		+
▶ Work With Addresses - QBE				
<input checked="" type="checkbox"/> Work With Addresses - Grid	1		GridOut_1_3	
Include Count		<input type="checkbox"/>		
Select All Rows				+
Select Row				+
Address Line 1	40	<input type="checkbox"/>		
Address Number	19	<input type="checkbox"/>		
Alpha Name	20	<input checked="" type="checkbox"/>	Alpha_Name	

Message


Name **MSRQ_MR260307_Send Credit Message**

Description Send credit hold message when customer exceeds credit limit

To Address Book ▼ Address Book

Cc

Bcc

 Preview

Subject

Plain Text

Placeholder ▼ | ↶ ↷ 🔍 Paragraph ▼ **B** *I* U ~~S~~ x₂ x² *T*_x |  := ▼

Customer : is over their credit limit

▲ Links - 1

▲ Application Links - 1

+ Add

▲ Customer Master Revision

Application

Link ID

Application Version Variable

Form

Version

Link Text

ID	Name	Description	Form Interconnect Value
7	<input type="text" value="mnAddressNumber"/>	<input type="text" value="Address Number (AN8)"/>	<input type="text" value="{ABNum}"/>
8	<input type="text" value="szCompany"/>	<input type="text" value="Company (CO)"/>	
11	<input type="text" value="mn_Tab_ToGoTo"/>	<input type="text" value="Math Numeric 01 (MATH01)"/>	<input type="text" value="00000"/>
12	<input type="text" value="szCountryForPayroll"/>	<input type="text" value="Country Code (CCPR)"/>	

Outputs and Assertions


Outputs	Assertions	Manipulate Outputs	Messages	Files
<p>View Example Output Null Date as String <input type="checkbox"/> Select All <input type="checkbox"/></p>				
Name	Field	Output	Value Type	Select
▶ System Values		<input type="text"/>		
▲ Orchestration Inputs		<input type="text"/>		
	Address_Number	<input type="text"/>	String	<input type="checkbox"/>
▲ FMRQ_MR260307_Set Credit Hold		<input type="text"/>		
▲ Work With Addresses		<input type="text"/>		
▲ FMRQ_MR260307_Set Credit Hold-Grid	Return All Grid Rows <input type="checkbox"/>	<input type="text"/>		
	Alpha Name	Alpha Name	String	<input checked="" type="checkbox"/>
▲ MSRQ_MR260307_Send Credit Message		<input type="text"/>		
	success	success	String	<input checked="" type="checkbox"/>

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** 

Address_Number



61516 

Output

 Status: OK (200) Time: 1.93 Seconds

```
{
  "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

Address Number / User / Role: 61516 mathur ravikumar
 Associated Address Number: 61516
 Tickler Date: 08/03/2026

Records 1 - 5

Queues	
<input type="checkbox"/>	Personal In Basket
<input checked="" type="checkbox"/>	<u>Over Credit Limit.</u>
<input type="checkbox"/>	<u>Over Credit Limit.</u>
<input type="checkbox"/>	<u>Over Credit Limit.</u>
<input type="checkbox"/>	Deleted

Message Text

Paragraph

To: 61516@EnterpriseOneInternalMailbox,
CC:

Customer 61516: is over their credit limit
[Customer Master Revision.jde]

Work Center

Address Number / User / Role: 61516 mathur ravikumar
 Associated Address Number: 61516
 Tickler Date: 08/03/2026

Records 1 - 5

Queues	
<input type="checkbox"/>	Personal In Basket
<input checked="" type="checkbox"/>	<u>Over Credit Limit.</u>
<input type="checkbox"/>	<u>Over Credit Limit.</u>
<input type="checkbox"/>	<u>Over Credit Limit.</u>
<input type="checkbox"/>	Deleted

Customer Master Revision.jde

Last Modified

Customer Master Revision.jde

Customer Master Revision

✓ ✕ ⚙ Form ⚙ Tools

Customer Number *mathur ravikumar*
Long Address Number
Company

[Invoices](#) [Credit](#) [Collection](#) [G / L Distribution](#) [Tax Information](#) [Customer Ship Notice](#) [EDI Information](#)

Credit Limit	<input type="text"/>	Recall for Review Date
Credit Manager	<input type="text"/>	Date of Last Credit Review
Credit Message	<input type="text" value="7"/> <i>On Credit Hold per A...</i>	Date Account Opened

Name: ORCH_MR260308_NONSTOCK ITEM CREATION

Description: ORCH_MR260308_NONSTOCK ITEM CREATION

Purpose:

DTRQ_MR260309_REORDERPOINT

Name	DTRQ_MR260309_REORDERPOINT						
Description	DTRQ_MR260309_REORDERPOINT						

Table/View Name	F4102	Item Branch File	Load	Get V			
Filter:	Type to filter	Options					
Description	Data Dictionary						
Item Pool	PRPO						
Commodity Code	CDCD						
Prd Grp	PDGR						
Dsp Grp	DSGP						
Primary Supplier	VEND						
Planner Number	ANPL						
Buyer Number	BUYR						
G/L Cat	GLPT						

Filter Criteria

Include

Match Type Match All Match Any

	Description	Operator	Values	
☰	Business Unit	is equal to ▼	\${Business Unit 1} ▼	✕
☰	2nd Item Number	is equal to ▼	\${2nd Item Number 1} ▼	✕

Return Fields and Variable Names

Include Count

	Description	Variable	Associated Description	
☰	ROP	ROP		✕

DTRQ_MR260309_ONHANDINVENTORY

Name: DTRQ_MR260309_ONHANDINVENTORY
 Description: DTRQ_MR260309_ONHANDINVENTORY

Table/View Name: F41021 Item Location File Load Get V
 Filter: x 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		

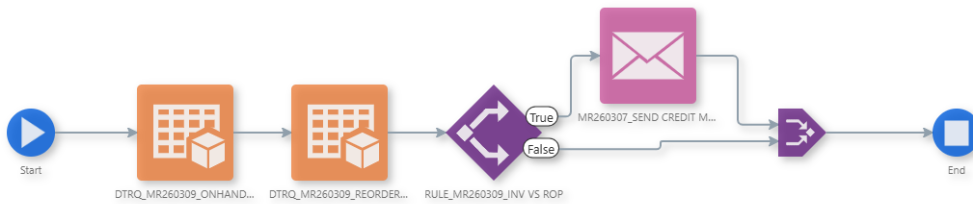
Rule

Name **RULE_MR260309_INV VS ROP** Product Code
Description RULE_MR260309_INV VS ROP  Category

Match Type **Match All**

Rule Type	Value 1	Operator	Literal	Value 2
String	\${ONHAND}	<	<input type="checkbox"/>	\${ROP}
		=	<input type="checkbox"/>	

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	Or Pr Dc
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

< ✎ EnterpriseOne Application Details

Link Information:

Application: *

Form: *

Version:

Personal Form:

Name: *

Description:

Maximize Main Grid:

EnterpriseOne Link Owner:

What type of link:

Static Link i

Dynamic Link i

When do you want to see the content frame:

Always i

Sometimes i

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 Entered	is mapped to	LITM(2nd 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.

Order Number	Order Type	Line Number	Branch Plant	2nd Item Number	Supplier Number	Next Status	Quantity Ordered	Quantity Open	Order Date	Request Date	Origin Priority Date
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	

Promise Date	Demand	Supply	Quantity Available	Order No	Type
03/13/2025			1778.00	1778.00	
03/05/2025		300.00	1778.00	408	OP
03/05/2025		100.00	1778.00	407	OP
03/06/2025		1000.00	1778.00	412	OP
03/07/2025		10.00	1778.00	423	OP
03/10/2025		1000.00	1778.00	425	OP
03/10/2025		100.00	1778.00	426	OP
03/11/2025		1000.00	1778.00	432	OP

Split view of the left pane

Order Number	Order Type	Line Number	Branch Plant	2nd Item Number	Supplier Number	Next Status	Quantity Ordered	Quantity Open	Order Date	Request Date	Origin Priority Date
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	

Split view of the right pane

The screenshot displays the SAP 'Work With Supply and Demand' interface. At the top, the title bar reads 'Work With Supply and Demand - Demand and Supply Inquiry - Plant Maint'. Below this, the main header is 'Work With Supply and Demand'. The interface includes a navigation bar with a checkmark, search, and refresh icons. Two expandable sections are visible: 'Selection' and 'Available to Promise'. Below these is a table showing records 1 through 9. The table has columns for Promise Date, Demand, Supply, Quantity Available, Order No, and Type. The first record is selected, indicated by a blue circle in the selection column.

	Promise Date	Demand	Supply	Quantity Available	Order No	Type
<input checked="" type="radio"/>	03/13/2025		1778.00	1778.00		
<input type="radio"/>	03/05/2025		300.00	1778.00	408	OP
<input type="radio"/>	03/05/2025		100.00	1778.00	407	OP
<input type="radio"/>	03/06/2025		1000.00	1778.00	412	OP
<input type="radio"/>	03/07/2025		10.00	1778.00	423	OP
<input type="radio"/>	03/10/2025		1000.00	1778.00	425	OP
<input type="radio"/>	03/10/2025		100.00	1778.00	426	OP
<input type="radio"/>	03/11/2025		1000.00	1778.00	432	OP
<input type="radio"/>	03/11/2025		10.00	1778.00	433	OP

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.

One View Work Order Cost Analysis - One View Work Order Cost Analysis Inquiry Personal Form: (No Perso

Q X Tools

Item Number

Records 1 - 8

Work Order Branch/Plant	2nd Item Number	Cost Type	Standard Units	Actual Units	Actual Variance	Standard Amount
M30	2001	A1	167.0000		61,157.6300	20,061.9
M30	2001	B1	167.0000		61,157.6300	4,024.0
M30	2001	A1	1,000.0000			120,131.0
M30	2001	B1	1,000.0000			24,100.0
M30	2001	B3	1,000.0000			4,000.0
M30	2001	C3	1,000.0000			4,905.0
M30	2001	C4	1,000.0000			4,905.0
M30	2001	D1	1,000.0000			5,000.0

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

Edit EnterpriseOne Application Details

Link Information:

Application: * P48013

Form: * Work With Manufacturing Work Orders(W48013J) v

Version: Work Order version(ZJDE0001) v

Personal Form: Default v

Name: * P48013|W48013J|ZJDE0001

Description: Work With Manufacturing Work Orders - Work Order version

Automatically Find On Entry

Maximize Main Grid:

What type of link:

Static Link i

Dynamic Link i

Static Value: Your text + Separator: ,

Parameters	Operation	Parameter Value
Document (Order No, Invoice, etc.)	is mapped to v	DOCO(WO Order Number) ?
Program ID	remains as v	

When do you want to see the content frame:

Always i

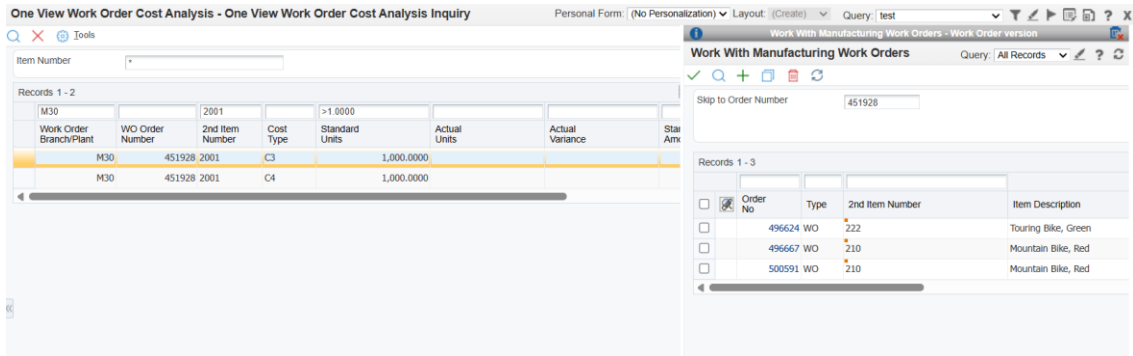
Sometimes i

Step 3

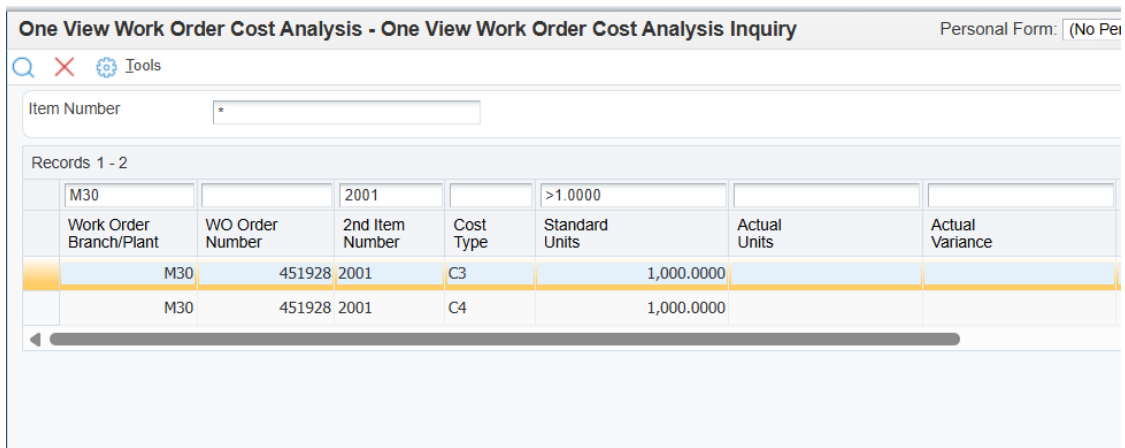
Completed view of first right pane looks like below.

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

Records 1 - 3

<input type="checkbox"/>		Order No	Type	2nd Item Number	Item Description
<input type="checkbox"/>		496624	WO	222	Touring Bike, Green
<input type="checkbox"/>		496667	WO	210	Mountain Bike, Red
<input type="checkbox"/>		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.

Work With Item Branch Personal Form: (No Personaliza)

Item Number

Records 1 - 2

Branch/Plan	Item Number	Description	Stocking Type	Buyer Number	Planner Number	Supplier Number	Plan Family	Line Type	3rd Item Number
M30	2002	Cro-Moly Frame, Two Tone	P	8444	8444	200	S	2002	
M30	2003	Cro-Moly Frame, Green	P	8444	8444	200	S	2003	

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: *

Form: *

Version:

Personal Form:

Name: *

Description:

What type of link:

- Static Link *i*
- Dynamic Link *i*

Static Value: Separator:

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) <i>?</i>
Business Unit	is mapped to	MCU(Branch/Plant) <i>?</i>

When do you want to see the content frame:

- Always *i*
- Sometimes *i*

Create Link to EnterpriseOne Application

Link Information:

Application: *

Form: *

Version:

Personal Form:

Name: *

Description:

What type of link:

Static Link *i*

Dynamic Link *i*

Static Value: Separator:

Parameters	Operation	Parameter Value
Business Unit	is mapped to	MCU(Branch/Plant) <i>?</i>
Item Number - Short	is mapped to	ITM(Short Item No) <i>?</i>
Status	remains as	
Document Type	remains as	

When do you want to see the content frame:

Always *i*

Sometimes *i*

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

Item Number

Records 1 - 2

Branch/Plant	Item Number	Description	Stocking Type	Buyer Number	Planner Number	Supplier Number	Plan Finity	Line Type	3rd Nur
M30			P			<1	200		
<input type="checkbox"/>	M30 2002	Cro-Moly Frame, Two Tone	P	8444	8444		200	S	200:
<input type="checkbox"/>	M30 2003	Cro-Moly Frame, Green	P	8444	8444		200	S	200:

Quantities - Branch/Plant Item Information

Quantities

Reorder Quantity	<input type="text"/>
Maximum Reorder Qty	<input type="text" value=".00"/>
Minimum Reorder Qty	<input type="text"/>
Reorder Point	<input type="text" value=".15"/>
Multiple Order Quantity	<input type="text"/>
Units Per Container	<input type="text" value="1"/>
Safety Stock	<input type="text" value=".02"/>

Additional System Info

Branch/Plant

Item Number

Plant Manufacturing **Grade and Potency** Service/Warranty

Order Policy Code Lot for Lot, As Re

Order Policy Value

Planning Code Planned by MRP

Planning Fence Rule Customer Deman

Planning Fence

Freeze Fence

Message Display Fence

Setup Labor

Move / Queue Hours

Suppress MRP Messages

ECO Number

ECO Reason

ECO Date

Issue and Receipt No Action Taken

Replenishment Hours

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.

The screenshot shows the 'Work With Detail Messages' application interface. At the top, there is a title bar with 'Work With Detail Messages' and 'Personal Form: (No Personalization) Layout: (No Layout)'. Below the title bar is a toolbar with icons for search, add, delete, refresh, and view. The main area contains a query-by-example (QBE) form with fields for Item Number, Branch/Plant, Planner Number, Master Planning Family, Buyer Number, and Project Number. Below the QBE form is a data grid showing records 1-7. The grid has the following columns: 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, and Start Date. The data rows are as follows:

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	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

Edit EnterpriseOne Application Details

Link Information:

Application: * P4021

Form: * Work With Supply and Demand(W4021B) ▾

Version: Demand and Supply Inquiry - Plant Maint(ZJDE0003) ▾

Personal Form: Default ▾

Name: * P4021|W4021B|ZJDE0003

Description: Work With Supply and Demand - Demand and Supply Inquiry - Plk

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(Demand Branch)
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 ▾	LITM(Item Number) ⓘ

When do you want to see the content frame:

Always ⓘ

Sometimes ⓘ

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.

The screenshot displays the SAP 'Work With Demand and Supply Inquiry - Plant Maint' interface. It is divided into three main panes:

- Work With Detail Messages:** Shows a list of demand messages with columns for Demand Branch, Item Number, Msg Typ, Message, Message Processed, Required Quantity, UM, Order Number, Or Ty, and Request Date. The first row is highlighted.
- Work With Item Availability:** Shows a table with columns for Location, Lot/Serial, Branch/Plant, On Hand, Committed, and Available. It includes a 'TOTAL' row and a 'GRAND TOTAL' row.
- Work With Supply and Demand:** Shows a table with columns for Promise Date, Demand, Supply, Quantity Available, Order No, and Type. It lists various dates and quantities.

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.

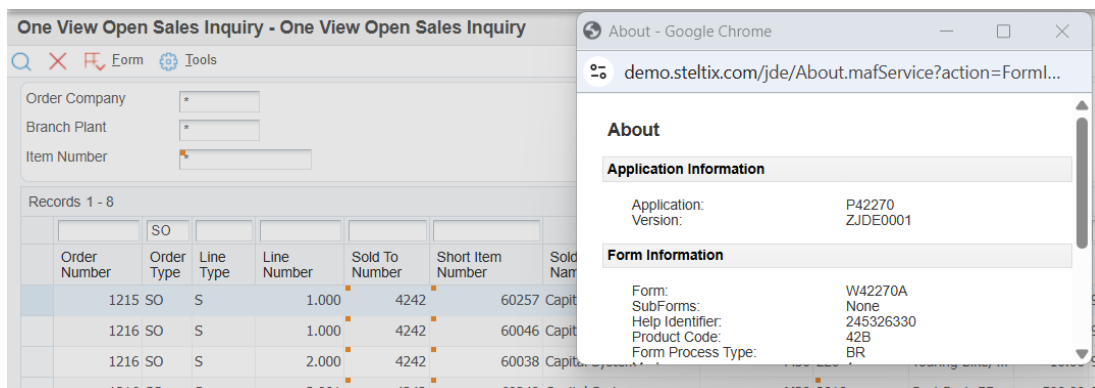
Limitations: Ensure you have security access to generate the CAFE1 UDOs.

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.



The screenshot shows the 'One View Open Sales Inquiry' application interface. The main window displays a grid of sales data with columns for Order Number, Order Type, Line Type, Line Number, Sold To Number, Short Item Number, and Sold Name. The grid shows three rows of data. An 'About' dialog box is open in the foreground, displaying application and form information.

Order Number	Order Type	Line Type	Line Number	Sold To Number	Short Item Number	Sold Name
1215	SO	S	1.000	4242	60257	Capital
1216	SO	S	1.000	4242	60046	Capital
1216	SO	S	2.000	4242	60038	Capital

About

Application Information

Application: P42270
Version: ZJDE0001

Form Information

Form: W42270A
SubForms: None
Help Identifier: 245326330
Product Code: 42B
Form Process Type: BR

Create Link to EnterpriseOne Application

Link Information:

Application: * P4021

Form: * Work With Supply and Demand(W4021B) v

Version: Supply & Demand Inquiry with ATP Lines for Dail(ZJDE0001C v

Personal Form: Default v

Name: * P4021|W4021B|ZJDE0001D

Description: Work With Supply and Demand - Supply & Demand Inqui

Maximize Main Grid:

What type of link:

Static Link i

Dynamic Link i

Static Value: Your text + Separator: ,

Parameters	Operation	Parameter Value
Business Unit	is mapped to v	MCU(Branch Plant) ?
Unit of Measure as Input	remains as v	
J.D. EnterpriseOne Event Point 01	remains as v	
Quantity Available	remains as v	
Item Number - Unknown Format	is mapped to v	UITM(Item Number) ?

When do you want to see the content frame:

Always i

Sometimes i

Create Link to EnterpriseOne Application

Link Information:

Application: * P41202

Form: * Work With Item Availability(W41202A) v

Version: Item Availability(ZJDE0001) v

Personal Form: Default v

Name: * P41202|W41202A|ZJDE0001

Description: Work With Item Availability - Item Availability

Create Link to EnterpriseOne Application

Dynamic Link ⓘ

Static Value: Separator:

Parameters	Operation	Parameter Value
Item Number - Short	remains as	
Business Unit	is mapped to	MCU(Branch Plant) ⓘ
Address Number	remains as	
Units - Order/Transaction Quantity	remains as	
Date - Order/Transaction	remains as	

Sometimes ⓘ

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.

One View Open Sales Inquiry - One View Open Sales Inquiry

Personal Form: (No Personalization) | Layout: (Create) | Query: All Records

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

Records 1 - 10

Order Number	SO	Order Type	Line Type	Line Number	Sold To Number	Short Item Number	Sold To Name	Branch Plant	Item Number	Item Description
1215	SO	S	S	1.000	4242	60257	Capital System	M30	2020	Stem
1216	SO	S	S	1.000	4242	60046	Capital System	M30	221	Touring Bike, ...
1216	SO	S	S	2.000	4242	60038	Capital System	M30	220	Touring Bike, ...
1216	SO	S	S	3.000	4242	60249	Capital System	M30	2019	Seat Post, BB
1216	SO	S	S	3.001	4242	60249	Capital System	M30	2019	Seat Post, BB
1219	SO	S	S	1.000	4242	60038	Capital System	M30	220	Touring Bike, ...
1219	SO	S	S	1.001	4242	60038	Capital System	M30	220	Touring Bike, ...
1239	SO	S	S	1.000	4242	60257	Capital System	M30	2020	Stem
1345	OP	C	C	1.000	4242	60257	Capital System	M30	2020	Stem

Work With Supply and Demand

Selection

Available to Promise

Records 1 - 3

Promise Date	Demand	Supply	Quantity Available	Order No	Type
<input checked="" type="radio"/> 03/14/2025		1157.85	1157.85		
<input type="radio"/> 03/14/2025		420.15	1578.00		
<input type="radio"/> 03/14/2025		200.00	1778.00		

Work With Item Availability

Query: All Records

P	S	Location	Lot/Serial	Branch/Plant	On Hand	Committed	Available	On Receipt
<input type="checkbox"/>	<input type="checkbox"/>	.	.	M30	1157.85	1087.85	70.00	3967
<input type="checkbox"/>	<input type="checkbox"/>	WH.001.		M30	420.15	120.15	300.00	
<input type="checkbox"/>	<input type="checkbox"/>	S WH.001.	546783	M30	200.00		200.00	
<input type="checkbox"/>	<input type="checkbox"/>	TOTAL:		M30	1778.00	1208.00	570.00	3967
<input type="checkbox"/>	<input type="checkbox"/>	GRAND TOTAL:		M30	1778.00	1508.00	870.00	3967

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.

Work With Item Branch Personal Form: (No Personalization) L

Item Number

Records 1 - 10 > X

<input type="checkbox"/>	Branch/Plan	Item Number	Description	Stocking Type	Buyer Number	Planner Number	Supplier Number	Plc Fr
<input checked="" type="checkbox"/>	M30	2014	Brake Kit	P	8444	8444	4343	200
<input type="checkbox"/>	M30	1001	Bike Rack - Trunk Mount	P	8444	8444	4343	240
<input type="checkbox"/>	M30	210	Mountain Bike, Red	P	8444	8444	4242	200
<input type="checkbox"/>	M30	230	Youth Sport Bike	P	8444	8444	64360	200
<input type="checkbox"/>	M30	2011	Chain, Std	P	8444	8444	4343	200
<input type="checkbox"/>	M30	2012	Chain, DX	P	8444	8444	4343	200
<input type="checkbox"/>	M30	2013	Shift Kit	P	8444	8444	4343	200
<input type="checkbox"/>	M30	2002	Cro-Moly Frame, Two Tone	P	8444	8444		200
<input type="checkbox"/>	M30	2008	Head Set	P	8444	8444	4343	200
<input type="checkbox"/>	M30	2009	Crank	P	8444	8444	4343	200

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

Parameters	Operation	Parameter Value
Item Number - Short	is mapped to	ITM(Short Item No)
Status	remains as	
Document	remains as	

Work With Item Branch

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

Item Master Revisions - Item Master Revision

Item Number:

Records 1 - 10

Branch/Plant	Item Number	Description	Stocking Type	Buyer Number	Planner Number	Supplier Number	Pla Fm
<input checked="" type="checkbox"/>	M30 2014	Brake Kit	P	8444	8444	4343	200
<input type="checkbox"/>	M30 1001	Bike Rack - Trunk Mount	P	8444	8444	4343	240
<input type="checkbox"/>	M30 210	Mountain Bike, Red	P	8444	8444	4242	200
<input type="checkbox"/>	M30 230	Youth Sport Bike	P	8444	8444	64360	200
<input type="checkbox"/>	M30 2011	Chain, Std	P	8444	8444	4343	200
<input type="checkbox"/>	M30 2012	Chain, DX	P	8444	8444	4343	200
<input type="checkbox"/>	M30 2013	Shift Kit	P	8444	8444	4343	200
<input type="checkbox"/>	M30 2002	Cro-Moly Frame, Two Tone	P	8444	8444		200
<input type="checkbox"/>	M30 2008	Head Set	P	8444	8444	4343	200
<input type="checkbox"/>	M30 2009	Crank	P	8444	8444	4343	200

Item Master Revisions

Item Number:

Basic Item Data | Additional Info | **Weights and Measures** | Lot Processing

Unit Of Measures

Primary	<input type="text" value="EA"/>	Each
Secondary	<input type="text" value="EA"/>	Each
Purchasing	<input type="text" value="EA"/>	Each
Pricing	<input type="text" value="EA"/>	Each
Shipping	<input type="text" value="BX"/>	Box
Production	<input type="text" value="EA"/>	Each
Component	<input type="text" value="EA"/>	Each
Weight	<input type="text" value="OZ"/>	Ounces
Volume	<input type="text" value="FC"/>	Cubic Feet

Create Link to EnterpriseOne Application

Link Information:

Application:

Form:

Version:

Personal Form:

Name:

Description:

Maximize Main Grid:

Create Link to EnterpriseOne Application

Dynamic Link

Static Value: 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) ?

Always

Sometimes

Link Information:

Application: * P41003

Form: * Standard Units of Measure Revisions(W41003B) ▾

Version: ▾

Personal Form: Default ▾

Name: * P41003|W41003B

Description: Standard Units of Measure Revisions

Description: Standard Units of Measure Revisions

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
Unit of Measure	is mapped to ▾	UOM1(Unit of Measure - Primary) ?
Related Unit of Measure	remains as ▾	

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: All Records

Item Number

Records 1 - 10

Branch/Plant	Item Number	Description	Unit of Measure - Primary	Stocking Type	Buyer Number	Planner Number	Supplier Number	Plan Frty
	M30 2014	Brake Kit	EA	P	8444	8444	4343	200
	M30 1001	Bike Rack - Trunk Mount	EA	P	8444	8444	4343	240
	M30 210	Mountain Bike, Red	EA	P	8444	8444	4242	200
	M30 230	Youth Sport Bike	EA	P	8444	8444	64360	200
	M30 2011	Chain, Std	EA	P	8444	8444	4343	200
	M30 2012	Chain, DX	EA	P	8444	8444	4343	200
	M30 2013	Shift Kit	EA	P	8444	8444	4343	200
	M30 2002	Cro-Moly Frame, Two Tone	EA	P	8444	8444		200
	M30 2008	Head Set	EA	P	8444	8444	4343	200
	M30 2009	Crank	EA	P	8444	8444	4343	200

Item Master Revisions Item Master Revision

Item Number 2011

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	FA	Each

Work With Standard Units of Measure

Item Unit Of Measure Conversions Item Unit Of Measure Conversions Query: All Records

Records 1 - 2

From UoM	Quantity	To UoM	Structure Code	Exclude from SO	Exclude from PO	Sales UoM Seq	Procure UoM Seq
1 BX	= 10.00000000	EA					0

Work With Standard Units of Measure Work With Standard Units of Measure Query: All Records

Records 1 - 3

V C	From UoM	Description	V C	Conversion Factor	To UoM	Description
1	EA	Each	=	1.00000000	EA	Each
1	EA	Each	=	1.00000000	OZ	Ounces
1	EA	Each	=	1.00000000	RD	Rental Dep.

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 onview cost inquiry P41271 with lot availability application P41280

Table/Application Used: P41271 OR P41280, P41026

Step 1

Open UX one cost inquiry application

P41280

The screenshot shows the 'Work With Lot Availability' application interface. The main window displays a table with columns: Branch/Plant, Item Number, Description, Lot Status, Expiration Date, and Quantity On Hand. The table contains three rows of data for branch M30. An 'About' dialog box is open in the foreground, displaying application and form information.

Branch/Plant	Item Number	Description	Lot Status	Expiration Date	Quantity On Hand
M30	1001	Bike Rack - Trunk Mount			
M30	210	Mountain Bike, Red			17.46
M30	210	Mountain Bike, Red			.50

About

Application Information

Application: P41280
Version: ZJDE0001

Form Information

Form: W41280B
SubForms: None
Help Identifier: 243648011
Product Code: 40
Form Process Type: BR
Mode: 1
Generated by:

P41271

The screenshot shows the 'One View Inventory Valuation Analysis Inquiry - One View Inventory Valuation' application interface. The main window displays a table with columns: Branch/Plant, 2nd Item Number, Description, Location, and Lot Serial Number. The table contains several rows of data for branch M30. An 'About' dialog box is open in the foreground, displaying application and form information.

Branch/Plant	2nd Item Number	Description	Location	Lot Serial Number
M30	1001	Bike Rack - Trunk M...		
M30	210	Mountain Bike, Red		
M30	210	Mountain Bike, Red	1 A 1	
M30	230	Youth Sport Bike		
M30	220	Touring Bike, Red		

About

Application Information

Application: P41271
Version: ZJDE0001

Form Information

Form: W41271A
SubForms: None
Help Identifier: 243646750
Product Code: 41
Form Process Type: BR
Mode: 1

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

The screenshot shows the SAP One View Inventory Valuation Analysis Inquiry interface. The main table displays records with columns for Branch Plant, Branch Plant Description, Item Number, Description, and Description Line 2. The 'Create Link to EnterpriseOne Application' dialog box is open on the right, showing the following configuration:

- Application: P41026
- Form: Quantities(W41026C)
- Version: Branch/Plant Item Information(ZJDE0001)
- Personal Form: Default
- Name: P41026[W41026C]ZJDE0001
- Description: Quantities - Branch/Plant Item Information

Under 'What type of link', 'Dynamic Link' is selected. The 'When do you want to see the content frame' options are 'Always' (selected), 'Sometimes', and 'Never'. The 'Parameters' section shows:

Parameters	Operation	Parameter Value
Business Unit	is mapped to	MCU(Branch Plant)
Item Number - Short	is mapped to	ITM(Short Item No)
Status	remains as	
Document		

Left pane split below for better visual clarity

The screenshot shows the SAP One View Inventory Valuation Analysis Inquiry interface with the left pane split. The main table displays records with columns for Branch Plant, Branch Plant Description, Item Number, Description, and Description Line 2. The table data is as follows:

Branch Plant	Branch Plant Description	Item Number	Description	Description Line 2
10	Western Distribution Center	1001	Bike Rack - Trunk Mount	
30	Eastern Distribution Center	1001	Bike Rack - Trunk Mount	
70	French Distribution Company	1001	Bike Rack - Trunk Mount	
D30	EPS Distribution Center	1001	Bike Rack - Trunk Mount	
M30	Eastern Manufacturing Center	1001	Bike Rack - Trunk Mount	
7600	Brazilian Company	1001	Bike Rack - Trunk Mount	
10	Western Distribution Center	210	Mountain Bike, Red	DW
20	Northern Distribution Center	210	Mountain Bike, Red	DW
27	Eastern Area DC	210	Mountain Bike, Red	DW
27	Eastern Area DC	210	Mountain Bike, Red	DW

Right pane split below for better visual clarity

Link Information:

Application: * P41026

Form: * Quantities(W41026C)

Version: Branch/Plant Item Information(ZJDE0001)

Personal Form: Default

Name: * P41026|W41026C|ZJDE0001

Description: Quantities - 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
Business Unit	is mapped to	MCU(Branch Plant)
Item Number - Short	is mapped to	ITM(Short Item No)
Status	remains as	
Document Type	remains as	
Document (Voucher, Invoice, etc.)	remains as	
Effective - Thru Date	remains as	
J.D. EnterpriseOne Event Point	remains as	

Step 3

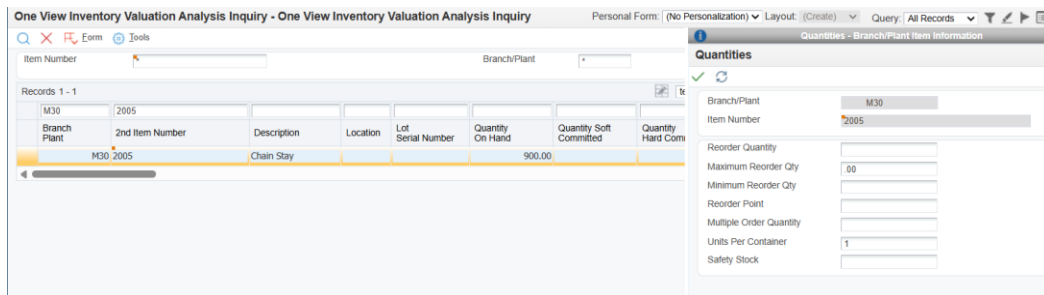
Final Cafe 1 layout composite view

Location field is visible in this application. Filter out data and

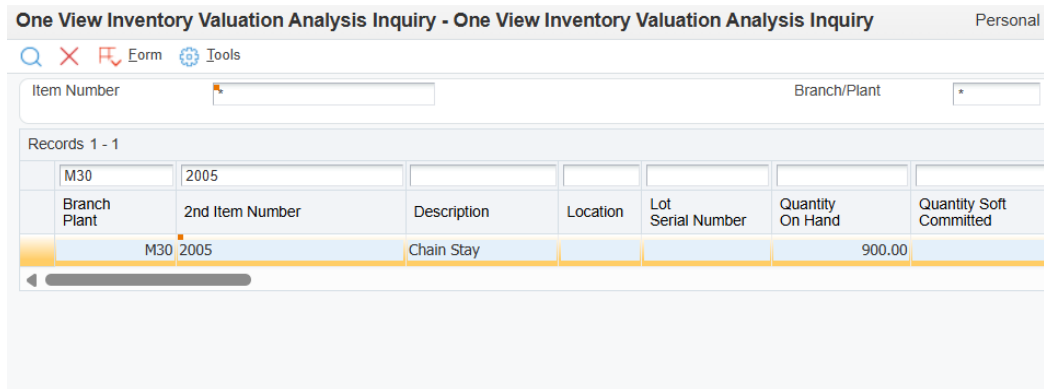
select the row, CAFE1 will bring the safetystock/quantities view on your right pane.

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	M30	
Item Number	2005	Chain Stay

Reorder Quantity	<input type="text"/>
Maximum Reorder Qty	.00
Minimum Reorder Qty	<input type="text"/>
Reorder Point	<input type="text"/>
Multiple Order Quantity	<input type="text"/>
Units Per Container	1
Safety Stock	<input type="text"/>

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!

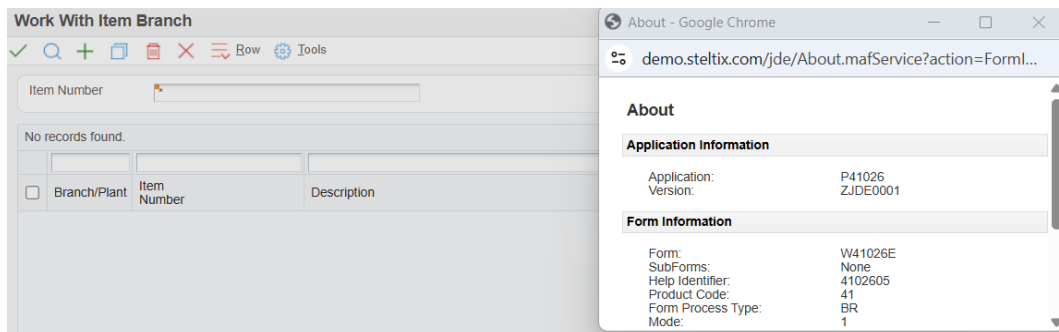
Technology used: Item Branch application

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 exist, 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	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	I	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	I	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
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

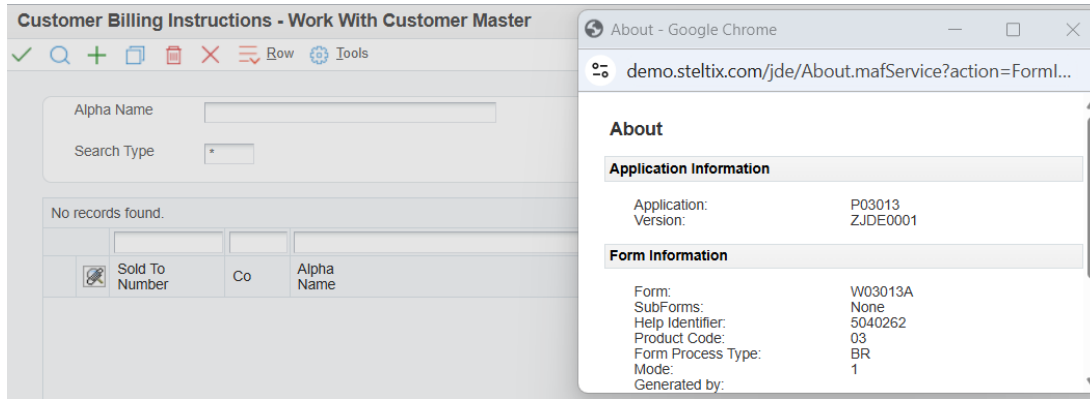
Limitations: Adhere to your current role security and controls

Table/Application Used: P03013

Step 1

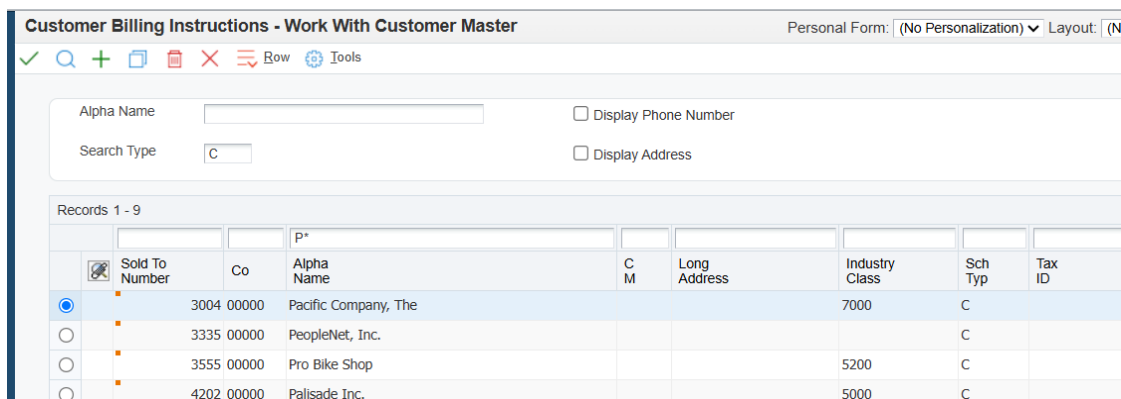
Open this application from your menu. If it does not exists, ask IT to deploy to your security role. You will be testing this in non-production environment first, so you can always ask for

enhanced role to open fast path. Ensure the right version of the application exists



Step 2

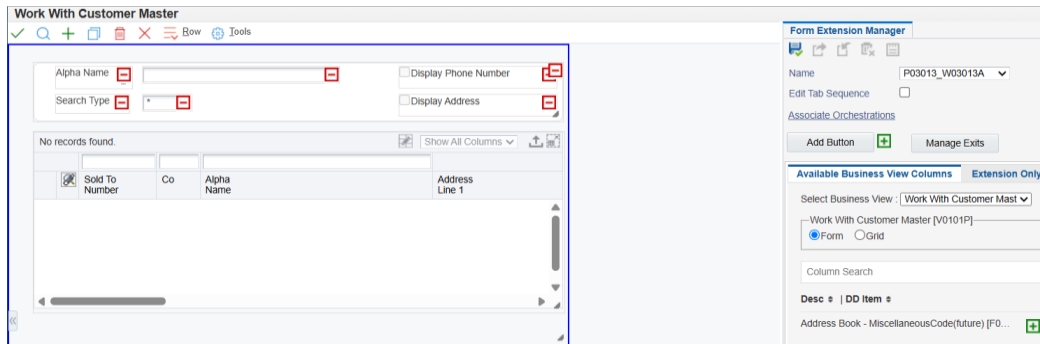
Customize the grid (example below), place some QBE values to get valid data points



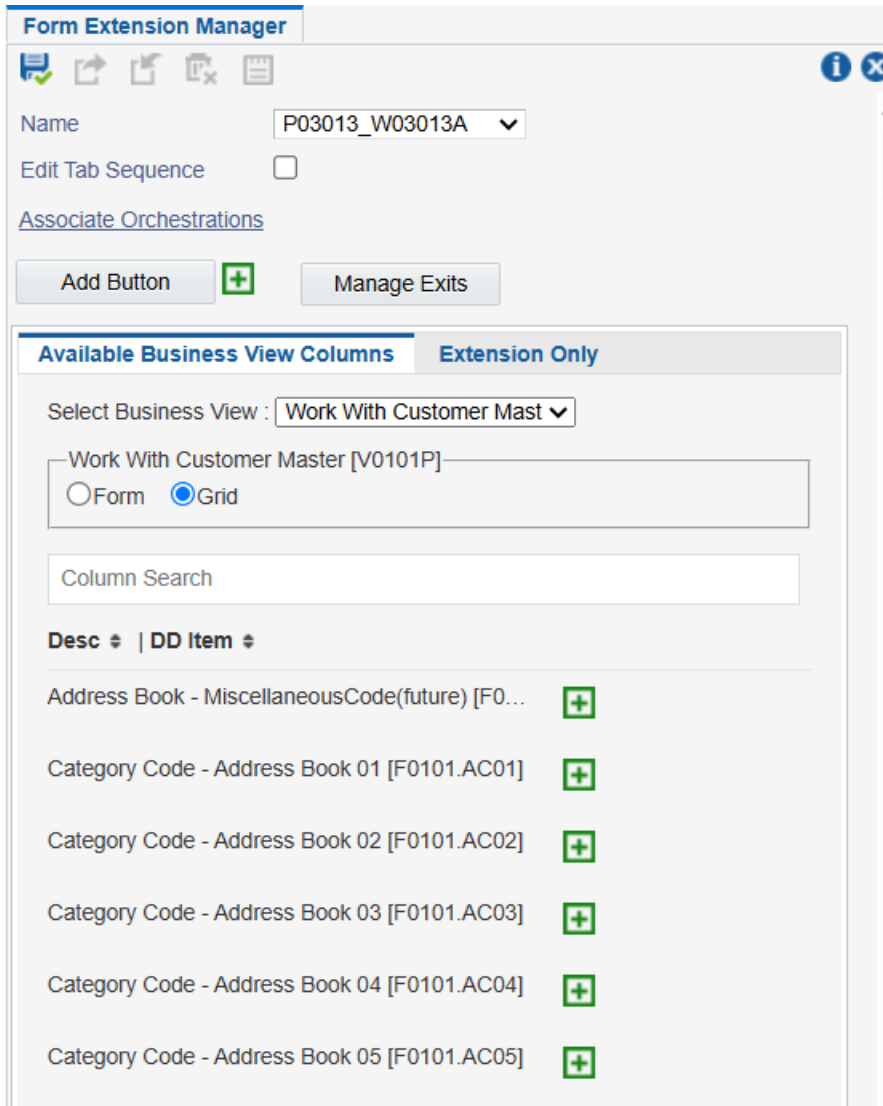
Step 3

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)

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 exist, 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

Work With Manufacturing Work Orders Personal Form: (No Personalization) Layout: (↑)

Skip to Order Number Branch/Plant

Records 1 - 10 > |

<input type="checkbox"/>	<input type="checkbox"/>	Order No	Type	2nd Item Number	Item Description	Item UOM	Order Date	Branch/Plant	Request Date	Planned Eff Date
<input type="checkbox"/>	<input type="checkbox"/>	451004	WO	220	Touring Bike, Red	EA	05/08/2009	M30	03/08/2025	0
<input checked="" type="checkbox"/>	<input type="checkbox"/>	451012	WO	2001	Cro-Moly Frame, Red	EA	05/08/2009	M30	06/23/2017	0
<input type="checkbox"/>	<input type="checkbox"/>	451021	WO	2004	Cro-Moly Frame	EA	05/08/2009	M30	06/12/2017	0
<input type="checkbox"/>	<input type="checkbox"/>	451039	WO	2005	Chain Stay	EA	05/08/2009	M30	06/07/2017	0
<input type="checkbox"/>	<input type="checkbox"/>	451080	WO	2600	Bike Trailer	EA	11/20/2009	M30	06/10/2017	0
<input type="checkbox"/>	<input type="checkbox"/>	451098	WO	4701	Vitamin A	GM	11/24/2009	M30	06/10/2017	0

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.

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

Customer	<input type="text"/>	
Supervisor	<input type="text"/>	
Planner	7500	McDougle, Cathy
Originator	<input type="text"/>	

Work Order Details

✓ ✕ ⌘ Form ⚙ Tools

Order No/Type	451012	WO	Branch/Plant	M30
WO Desc	Rush			
Item Number	2001	Cro-Moly Frame, Red		

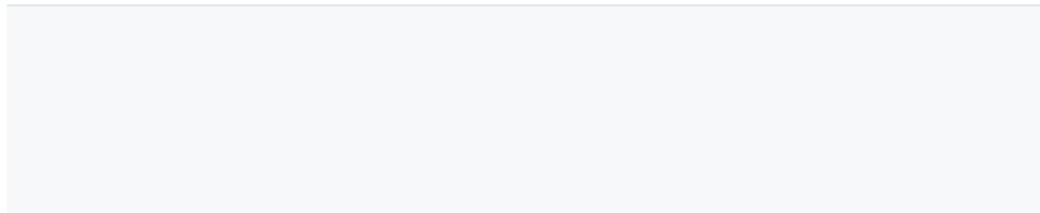
Dates & Qtys Status & Type **Cat Codes** People Addl Details 1 Addl Details 2 Attachment

Phase	<input type="text"/>	Status	<input type="text"/>
Category 02	<input type="text"/>	Service Type	<input type="text"/>
Category 03	<input type="text"/>	Skill Type	<input type="text"/>
Category 04	<input type="text"/>	Experience Level	<input type="text"/>
Category 05	<input type="text"/>	Category 10	<input type="text"/>

Step 2

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

Personal Form: (No Personalization) Layout: (No Layout) [Icons: Help, Copy, ? , X]



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

Work Order Details

✓ ✕ ⚙ Form ⚙ Tools

Order No/Type				Branch/Plant		
WO Desc						
Item Number						
Prev Order No						

Dates & Qtys | Status & Type | Cat Codes | People | Addl Details 1 | Addl Details 2 | Attachment

Dates			Quantities		
Requested		Mem	Order/UOM		
Planned Effective			Secondary/UOM		
Start			Shipped		
Work Order			Canceled		
Completed			Order + Shrink		

You can override the tab name, if needed

Work Order Details

✓ ✕ ⚙ Form ⚙ Tools

Order No/Type [] [] [] Branch/Plant [] [] []

WO Desc [] [] [] [] [] [] [] [] [] []

Item Number [] [] [] [] [] [] [] [] [] []

Prev Order No [] [] [] [] [] [] [] [] [] []

Dates & Qty's **Status & Type** **Cat Codes** **People** **Addl Details 1** **Addl Details 2** **Attachment** []

JDE PERSONAL FORM []

Requested [] [] [] Memo [] []

Status [] [] [] [] [] [] [] [] [] []

Phase [] [] [] [] [] [] [] [] [] []

Planner [] [] [] [] [] [] [] [] [] []

Order/UOM [] [] [] [] [] [] [] [] [] []

[] [] [] [] [] [] [] [] [] []

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)

Work Order Details

✓ ✕ ⚙ Form ⚙ Tools

Order No/Type Branch/Plant

WO Desc

Item Number

Prev Order No

Dates & Qtys **Status & Type** **Cat Codes** **People** **Add Details 1** **Add Details 2** **Attachment**

JDE PERSONAL FORM

Requested Memo

Status

Phase

Planner

Order/UOM

Hide
Reset
Cut
 Mark As Required

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 exist, 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

Enter Purchase Orders - Order Detail

✓ ✕ ⚙ Form ⌵ Row ⚙ Tools

Order Detail | Line Defaults | Additional Properties | Category Codes

Order Number: 780 OP 00001 Branch/Plant: 30

Supplier: 4342 SPD Freight Company

Ship To: 6031 Eastern Distribution Center Order Date: 09/16/2016

Hold Code: Blank - Hold Codes 42/HC [Order Attachment](#)

Retainage %:

Currency: USD Exchange Rate: Base: USD Foreign

Records 1 - 2

<input type="checkbox"/>	<input checked="" type="checkbox"/> Item Number	Description 1	Quantity Ordered	Tr. UoM	Unit Cost	Extended Cost
<input type="checkbox"/>	220	Touring Bike, Red	1.00	EA	44.0000	44
<input type="checkbox"/>						

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

Personal Form: (No Personalization) Layout: (No Layout) [Help] [Print] [?] [X]

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

The screenshot shows a software interface titled "Order Detail". At the top, there are tabs for "Order Detail", "Line Defaults", "Additional Properties", "Category Codes", and "Style". The "Order Detail" tab is active, displaying a form with several input fields: "Order Number", "Attachments", "Subject/Start", "Previous Order", "Supplier", "Ship To", "Order Date", and "Order Attachment". Each field has a small red square icon to its right, likely for deletion or repositioning. Below the form is a table with the following columns: "Item Number", "Description 1", "Quantity Ordered", "Tr. UoM", "Unit Cost", and "Extended Cost". The table is currently empty, with the text "No records found." above it. The interface also includes a search icon, a dropdown menu set to "TMX", and icons for refresh, save, and print.

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.

Enter Purchase Orders - Order Detail

✓ ✕ ⚙ Form ⌵ Row ⚙ Tools

Order Detail | Line Defaults | Additional Properties | Category Codes

Order Number: 780 OP 00001 Branch/Plant: 30

Supplier: 4342 SPD Freight Company

Ship To: 6031 Eastern Distribution Center Order Date: 09/16/2016

[Order Attachment](#)

Records 1 - 2 * TMX

<input type="checkbox"/>	<input type="checkbox"/>	Item Number	Description 1	Quantity Ordered	Tr. UoM	Unit Cost	Extended Cost
<input type="checkbox"/>	<input type="checkbox"/>	220	Touring Bike, Red	1.00	EA	44.0000	44.00
<input type="checkbox"/>							

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

Order Number	Or Ty	Order Co	Line Number	Hd Cd	Sold To	Sold To Name	Quantity	UOM	Extended Amount	Request Date	Ship To	2nd I Num
1217	SO	00200	1.000		4242	Capital System	1.00	EA	11.60	03/06/2025	4343	2020
1227	SO	00200	1.000		4242	Capital System	1.00	EA	25.10	03/10/2025	4242	2019
2402	SO	00001	1.000	C1	4242	Capital System	.15	EA		06/21/2017	4242	2011

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

Personal Form: (No Personalization) Layout: (No Layout) [Personal Form Icon] [Layout Icon] [Help Icon] [Close Icon]

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

Customer Service Inquiry

✓ 🔍 + 📄 ✕ 🔄 Form ⌵ Row ⚙️ Tools

Customer Service Inquiry **Additional Selections**

Order Number * * * Branch/Plant *
 Customer PO * Sold To
 Item Number * Ship To

No records found. * Basic

<input type="checkbox"/>	<input type="checkbox"/>	Order Number	Or Ty	Order Co	Line Number	Rev Nbr	Revision Reason	Hd Cd	Sold To	Sold To Name

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 * Branch/Plant

Customer PO

Item Number Sold To

Ship To

Records 1 - 10 > > * Basic

<input type="checkbox"/>	<input type="checkbox"/>	Order Number	Or Ty	Order Co	Line Number	Hd Cd	Sold To	Sold To Name	Quantity	UOM	E: A:
<input type="checkbox"/>	<input checked="" type="checkbox"/>	1217	SO	00200	1.000		4242	Capital System	1.00	EA	
<input type="checkbox"/>		1227	SO	00200	1.000		4242	Capital System	1.00	EA	
<input type="checkbox"/>		2402	SO	00001	1.000	C1	4242	Capital System	.15	EA	
<input checked="" type="checkbox"/>		2402	SO	00001	1.001	C1	4242	Capital System	.15	EA	
<input type="checkbox"/>		2403	SO	00001	1.000	C1	4242	Capital System	.25	EA	
<input type="checkbox"/>		2403	SO	00001	1.001	C1	4242	Capital System	.20	FA	

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 exist, 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

Address Book Revisions - Address Book Revision

Work With Addresses Address Book Revision

✓ ✕ Form < > Tools

Address Number 3001

Address Book Mailing Additional 1 Additional 2 Related Address Cat Code 1 - 10 Cat Code 11 - 20 Cat Code 21 - 30

Alpha Name * Global Enterprises

Long Address Number

Tax ID

Search Type * C Customers

Business Unit 1 Financial/Distribution Company

Step 2

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

Personal Form: (No Personalization) Layout: (No Layout) [Icons: Help, Print, ? , X]

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.

Address Book Revision

Form Tools

Previously Assigned Number	[Delete]	[Delete]	[Delete]
Address Number	[Delete]	[Delete]	[Delete]
Synchronization Status	[Delete]	[Delete]	[Delete]
Server Status	[Delete]	[Delete]	[Delete]

Address Book Cat Code 1 - 10

Alpha Name * [Field] [Delete]

Long Address Number [Field] [Delete]

Secondary Alpha Name [Field] [Delete]

Tax ID [Field] [Delete]

Search Type * [Field] [Delete]

Business Unit [Field] [Delete]

Address Line 1 [Field] [Delete]

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.

The screenshot shows the SAP 'Address Book Revisions - Address Book Revision' form. At the top, there are tabs for 'Work With Addresses' and 'Address Book Revision'. Below the tabs, there are navigation icons for 'Form' and 'Tools'. The main form area contains the following fields:

- Address Number:** 3001
- Alpha Name *:** Global Enterprises
- Long Address Number:** (empty)
- Tax ID:** (empty)
- Search Type *:** C Customers
- Business Unit:** 1 Financial/Distribution Company

BASIC STEPS SECTION

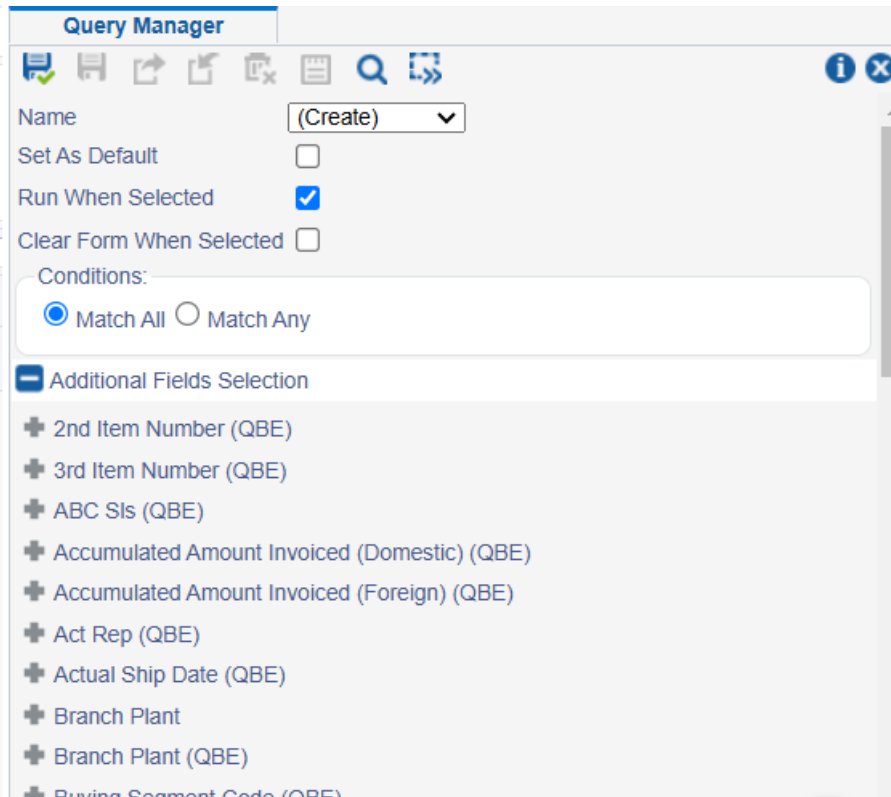
Watch List Creation - Basic Steps

Step 1

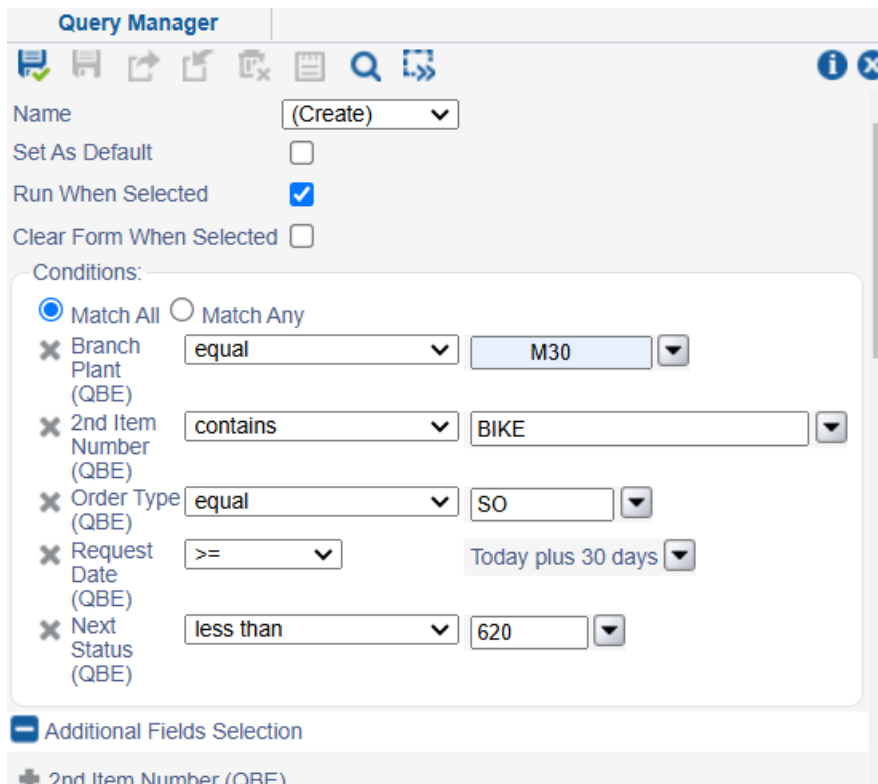
For every watchlist, you will create a query first. This is applicable across any JDE applications and databrowser tables. Create a query with unique yet intelligent naming convention. This helps to pick and save the same watchlist later.

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)



Step 3



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.

Watchlist Manager

Name: (Create) ▾

Description: provide more details

Threshold Type: Ascending Descending

Warning Threshold:

Critical Threshold:

Advanced Options ▾

Query to be Used * ▾

Query Details:

Match all of the following:

• 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

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

Work With Detail Messages Personal Form: (No Personalization) Layout

✓ 🔍 + 🗑️ ✖️ ⚙️ Form ⌵ Row 🖨️ View ⚙️ Tools

Item Number Branch/Plant

Planner Number

Master Planning Family Buyer Number

Project Number Planning Code

No records found.

<input type="checkbox"/>	<input type="checkbox"/>	Demand Branch	Item Number	Msg Typ	Message	Message Processed	Required Quantity	UM	Order Number	Or Ty	Request Date	W.O. Status	P.O. Stat
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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.

JD Edwards Name (Create)

Work With Detail Messages Personal Form: (No Personalization) Layout: (Create) Query: All Records

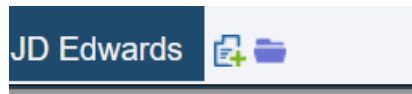
✓ 🔍 + 🗑️ ✖️ ⚙️ Form ⌵ Row 🖨️ View ⚙️ Tools

Item Number Branch/Plant

See below for bigger images

Left side pane for better clarity. Here you will click add and/or

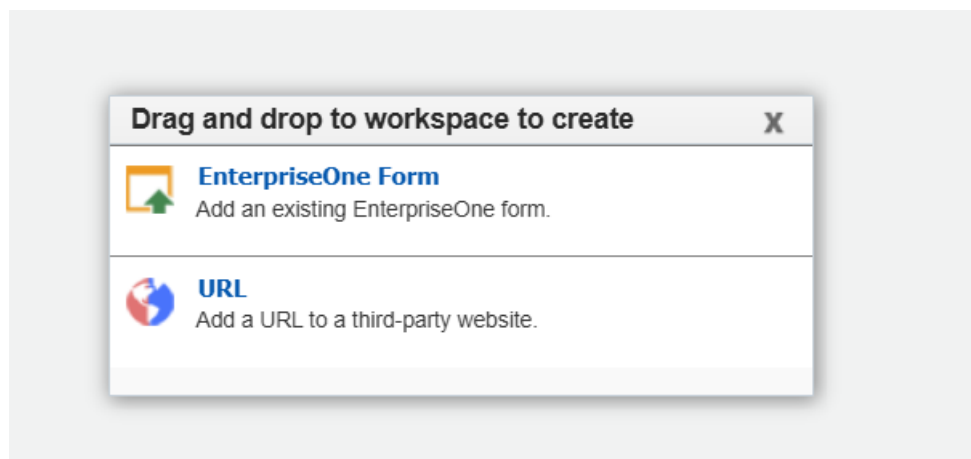
use folder to open. See below



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.

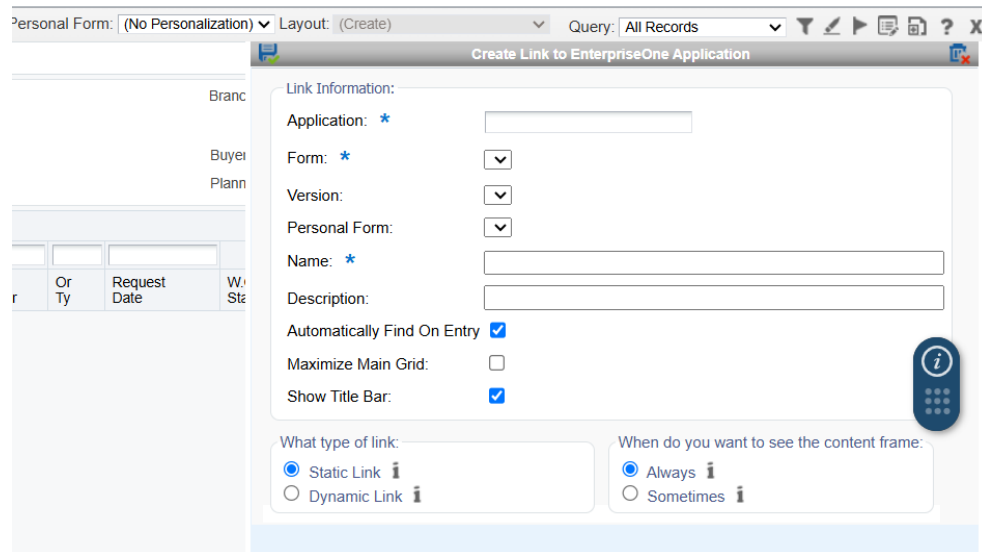
If you make mistakes, you can press delete or garbage can icon to start over.

If you need to edit your selection, information icon will show up once you save. 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.

He lives near San Francisco/California & reachable by email.

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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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