

*Comprehensive &  
easy to use workbook*

**Implementing  
Oracle JDE ERP UDOs  
(User Defined Objects)**

**Real Life Examples**

MATT RAVIKUMAR

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**Thank the Divine in making my dreams come true.**

**Thank my parents (MNS Mani & Lakshmi Mani) for their motivation and  
guidance.**

“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

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## 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 help 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 have been 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**

## 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 upgraded E1 (Enterprise One) project wants 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 In the meantime, end users are still working on stale reports and out of date data analytics.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 an interest in knowing cross functional business scenarios. If you go to the 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**

## Watch List Creation - Basic Steps

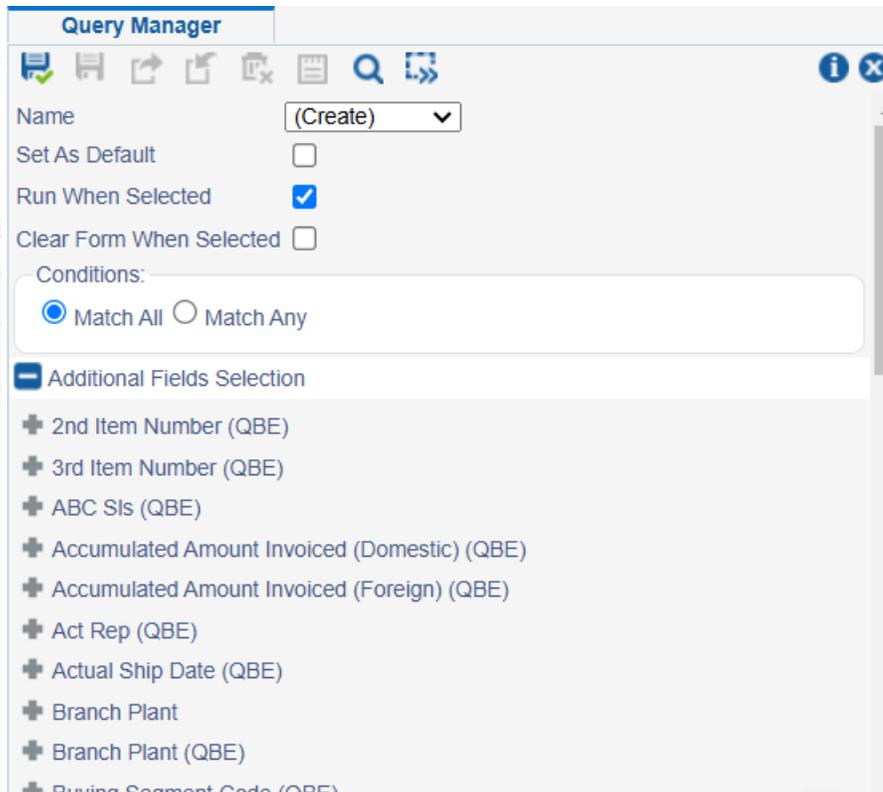
### Step 1

For every watchlist, you will create a query first. This is applicable across any JDE applications and databrowser tables

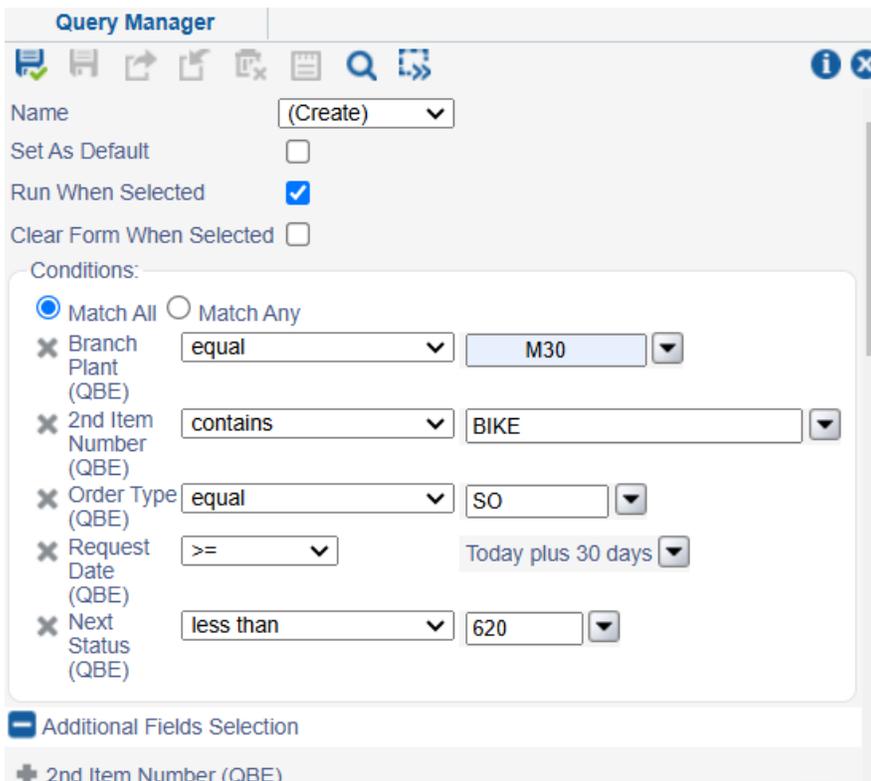
Create a query with unique yet intelligent naming convention. This helps to pick and save the same watchlist later

### Step 2

Always select run when selected option. Use set as fault if this query is unique and you do not want to go 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 a 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

The last one next status shows an example of <620 status.

Note, all the 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 you are working on. 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

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
- 2nd Item Number (QBE) contains BIKE
- Order Type (QBE) equal SO
- Request Date (QBE) >= Today plus 30 days
- Next Status (QBE) less than 620

# CAFÉ1 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

✓ 🔍 + 🗑️ ✕ ↺ Eorm ⌵ 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
--------------------------	--------------------------	---------------	-------------	---------	---------	-------------------	-------------------	----	--------------	-------	--------------	-------------	----------

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

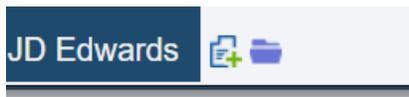
A new window tab opens on the top of your screen.



See below for bigger images

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

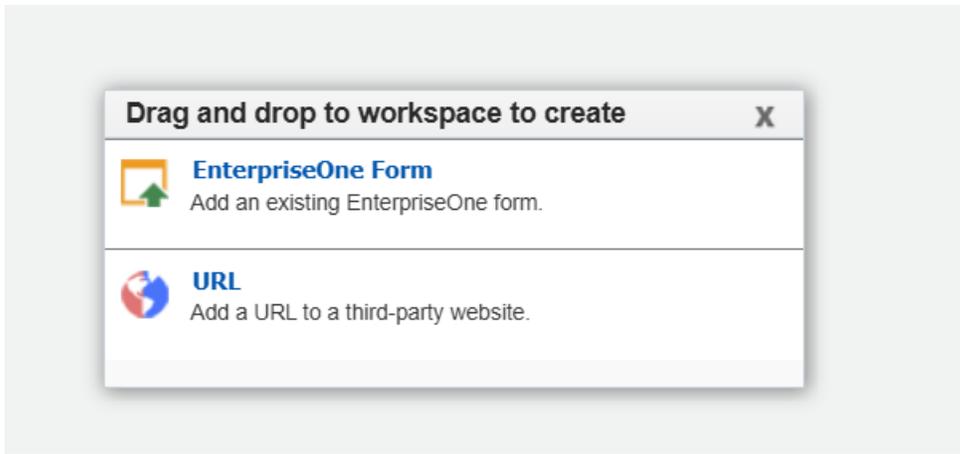
See below



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



Click on the plus park on the left pane



You have to 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 is provided in the respective CAFE1 sections in the book.

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

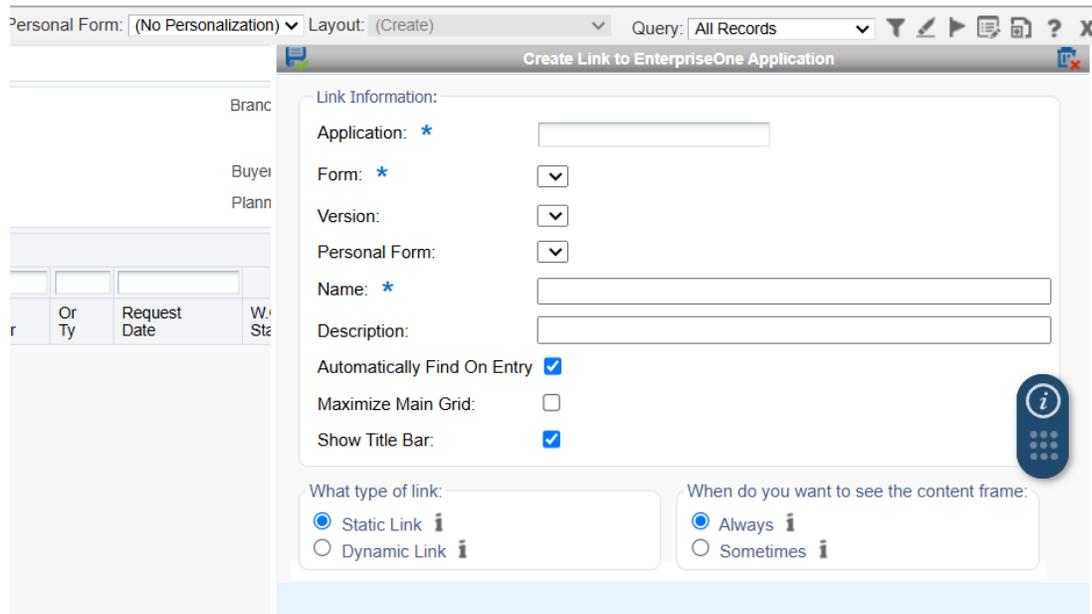
If you make mistakes, you can press delete or garbage can icon to start over.

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

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

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

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



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

## Overview of the contents and applications/tables involved.

JDE UDO SUMMARY SHEET			
#	Areas	Activity	App/Table
	Watchlists		
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	Manufacturing	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	CAFE1	CAFE1 MRP Review Composite	P3411
39		CAFE1 Workorder Composite	P48270
40		CAFE1 ItemBranch Composite	P41026
41		CAFE1 Sales Orders Composite	P42270
42		CAFE1 Purchasing Composite	P4338
43		CAFE1 Item UOM Composite	P41026
44		CAFE1 Onhand vs Safetystock	P41271
45	Personal Form	Personal Form Work Order Entry	P48013
46		Personal Form Purchase Order Entry	P4310
47		Personal Form Sales Order Entry	P4210
48		Personal Form Address Book Revisions	P03013
49	Grid Extension	Grid Extension: ItemBranch	P41026
50		Grid Extension: Customer Billing Instructions	P01013

## Overview of the contents and applications/tables involved.

LIST OF OBJECTS USED (sorted for consolidated security checks)	
P03B2022	Customer \$ performance, Aging Alert
P03013	Customer Master
P4311	Expiring Blanket Orders Inquiry
P41026	Item Branch
P41062	Item Price Inquiry
P41280	Lot Master Availability
P48013	Manufacturing Work Order Processing
P3411	MRP/MPS Detail Message Revisions
P41270	One View Ave.Cost Analysis Item Ledger Inquiry
P43264	One View Backordered Items Not Received Inquiry
P41272	One View Inv Cost Analysis By Item As Of Inquiry
P41271	One View Inventory Valuation Analysis Inquiry
P41273	One View Item Location Trace
P42270	One View Open Sales Inquiry
P48290	One View Planning Analysis Inquiry
P042022	One View Supplier Ledger Inquiry
P48280	One View WO dispatch inquiry
P48270	One View Work Order Cost Analysis Inquiry
P43011	PO Generator
P43081	Purchase Approvals Pending
P4310	Purchase Orders
P4210	Sales Order Entry
P41052	UX One Item Cost Inquiry
P4338	UX ONE Purchase Order Detail Inquiry
P31113	Work order Inventory Issue
P31226	Workorder Production Status

## ***Order Backlog Alert***

### 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.

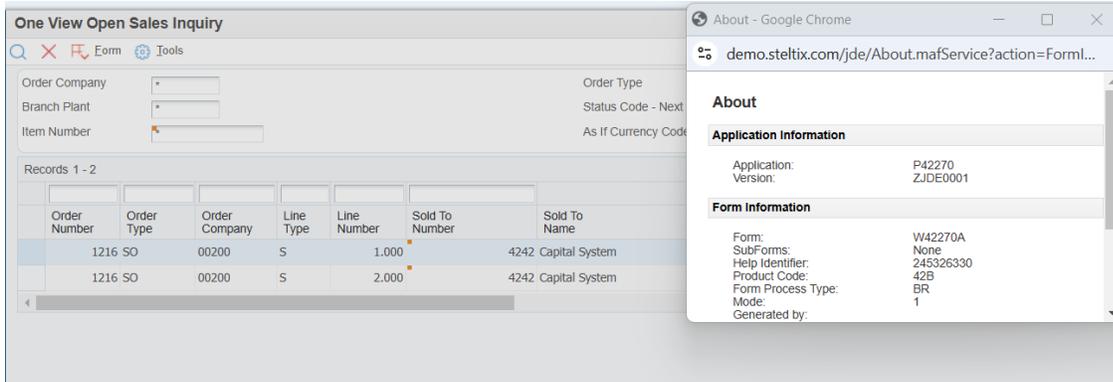
Technology used: One View Inquiry

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

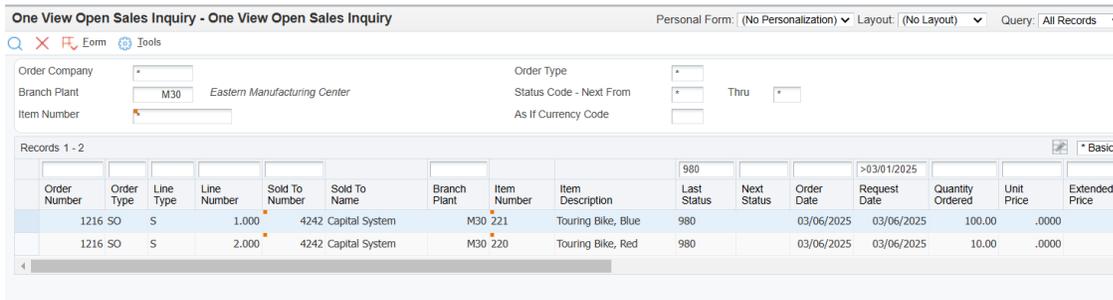
Open this application from your menu. If it does not exist, ask IT to deploy to your security role. You will be testing this in a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



## Step 2

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

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



## Step 3

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

Branch plant, order type, last status (580 in this example), request date >today plus 30 days (as example). Save the query with a unique understandable name

One View Open Sales Inquiry - One View Open Sales Inquiry

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

Order Company: [ ] | Order Type: [ ] | Status Code - Next From: [ ] Thru: [ ] | As If Currency Code: [ ]

Branch Plant: M30 Eastern Manufacturing Center

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	Last 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

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: matt-blog

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: [ ] | As If Currency Code: [ ]

Branch Plant: M30 Eastern Manufacturing Center

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	Last 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 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 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 type and on your priority customers' backlog. You can use sales order category codes to filter out critical customers if your company uses those catcodes. Also use filters like

extended price or order quantity to get critical data for your business. You do not want another report on 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 linked to your specific security role profile if cost data is considered confidential to the wider audience.

## ***Credit Cleared Alert***

### 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 with the 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 the 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 data browser tables without the need to open data browser. What we need is the data on the watchlist output, to highlight the number of orders released today (or date range) based on the data browser query

Table/Application Used: F4209 held orders

## Step 1

### Open data browser and use F4209

The screenshot shows the 'Data Browser - F4209 [Held Orders]' interface. At the top right, it says 'Query: All Records'. Below the search criteria section, there is a table with the following data:

Hd Cd	Person Responsible	Address Number	Business Unit	Order Co	Order Number	Or Ty
C1		8446	4242	M30 00200		2809 SO

## Step 2

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

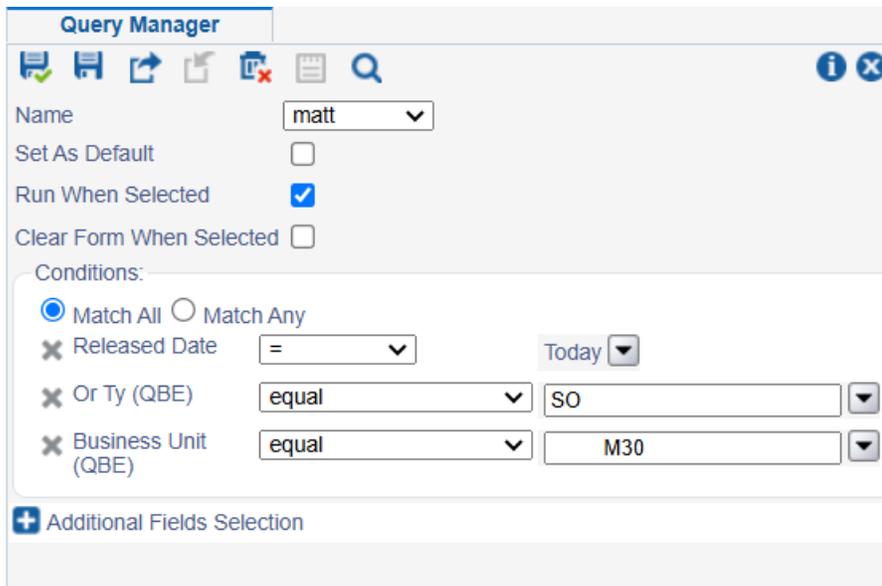
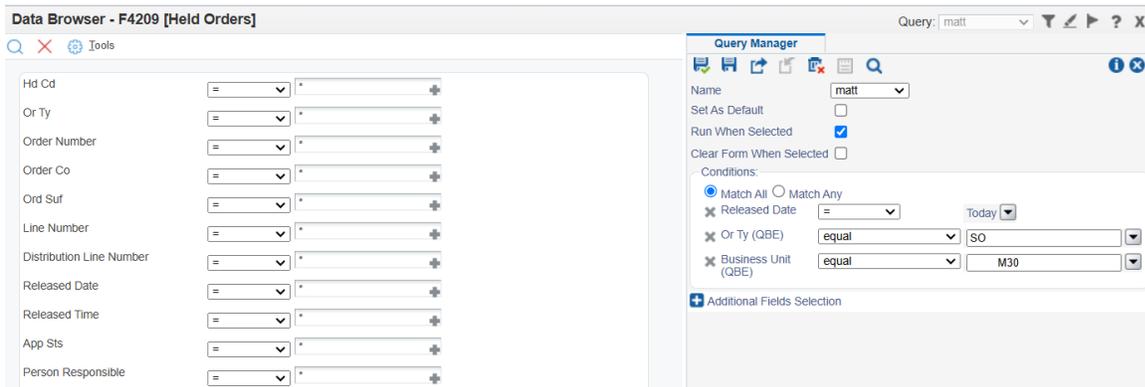
You can go creative with using =, <=, etc. on the release date value and use the option of today or <=7 days based on your business needs.

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 one or many branch plants applicable, to avoid JDE taking a lot of time scanning all the table data.

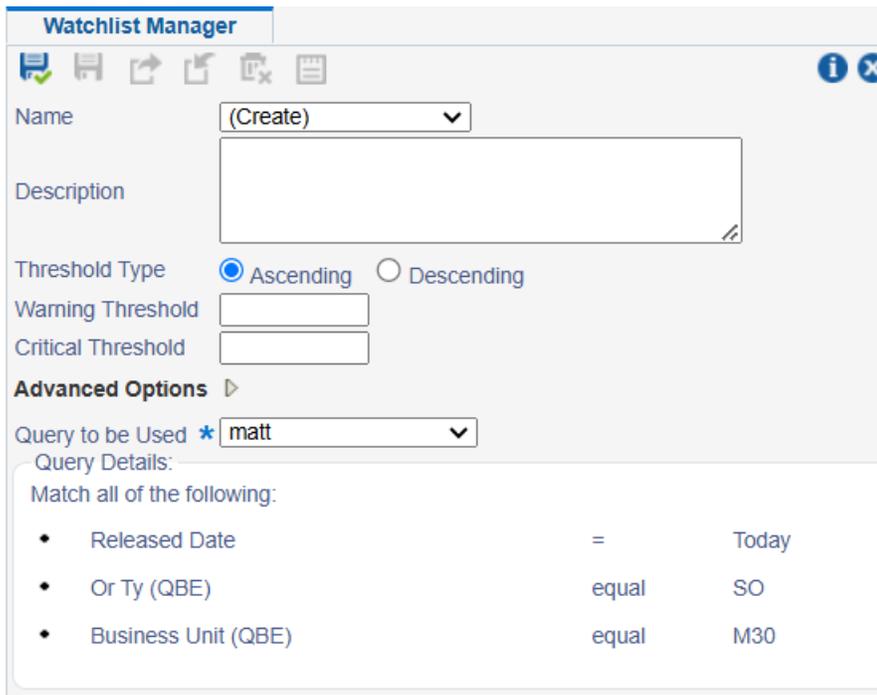
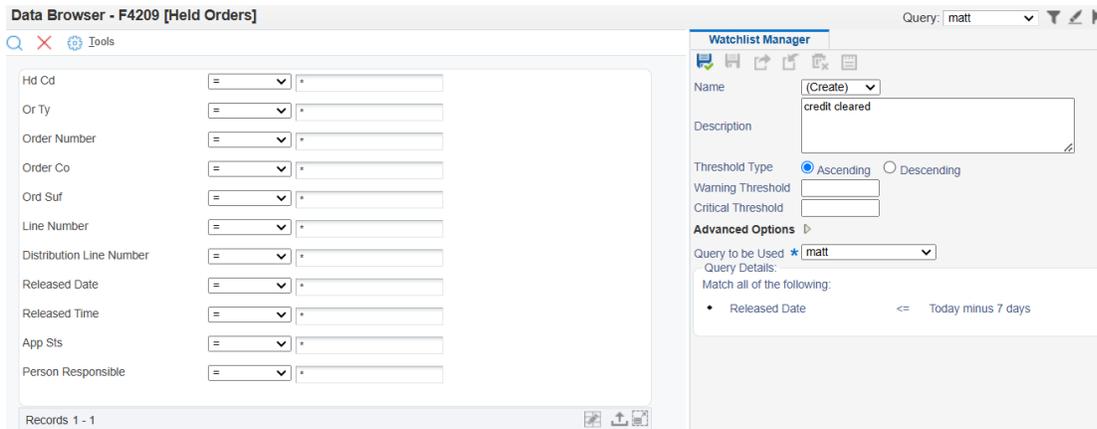
Start with one easy example and then copy the query for various order types, branches, order holds (this field is not shown in the screen below)

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



### Step 3

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



#### Step 4

If you go back to the main JDE application, open watchlists, you know one will show up. Press the refresh circle to get new data. The watchlist will show the count but will NOT open the data browser automatically. Open the 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 find 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)

## ***Orders Due Next 30 days***

### Business Requirement:

As sales supervisor or manager, your manager or management wants to know about 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.

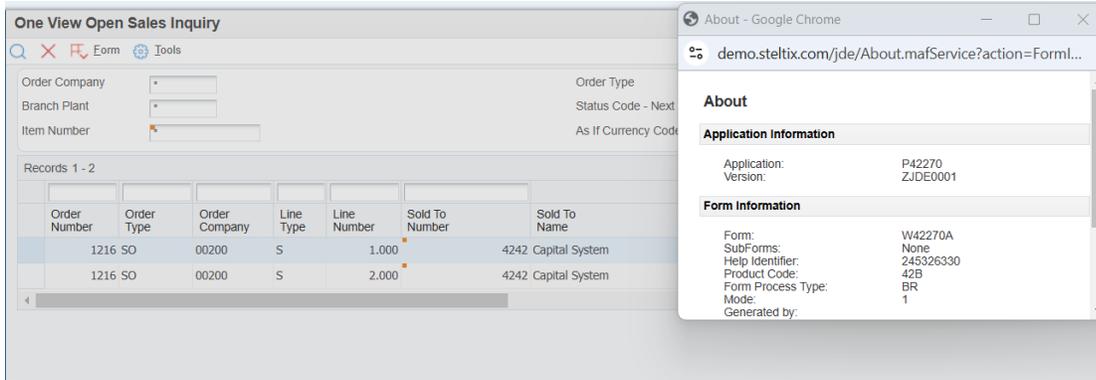
### Technology used: One View Inquiry

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

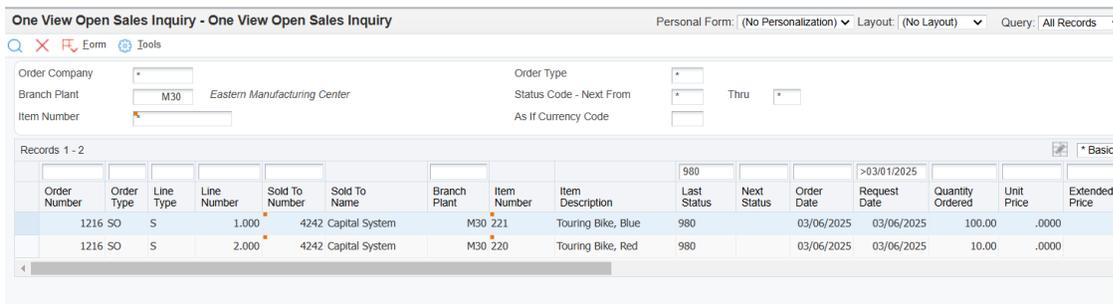
### Step 1

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 a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



## Step 2

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



## Step 3

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

Branch plant, order type, request date = today plus 30 days (as example). Save the query with a unique understandable name

One View Open Sales Inquiry

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

Query Manager

Name: matt-future

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

+ Additional Fields Selection

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:

Clear Form When Selected:

Conditions:

Match All  Match Any

Branch Plant (QBE) equal M30

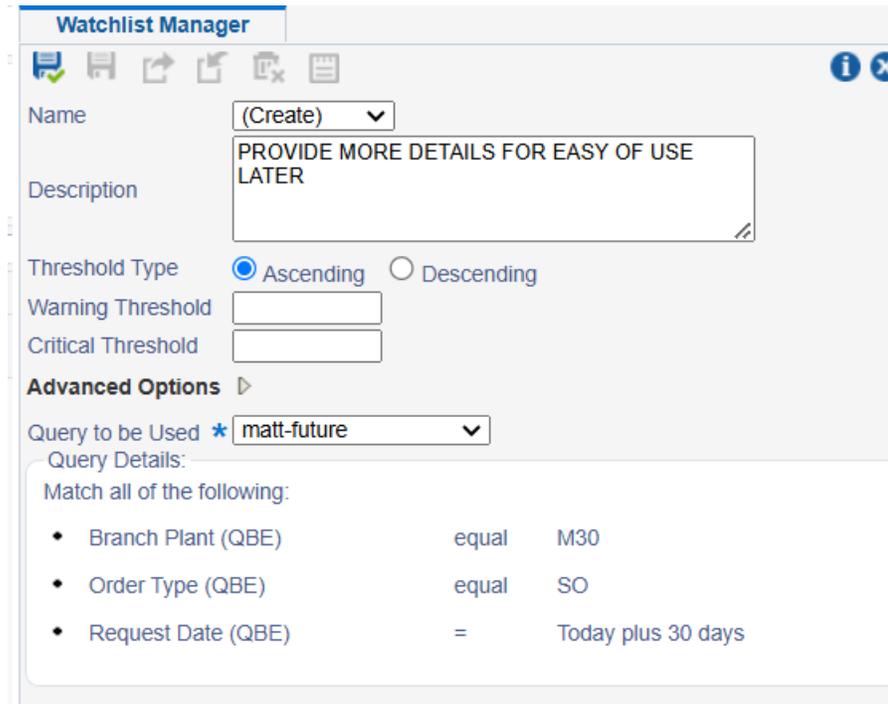
Order Type (QBE) equal SO

Request Date (QBE) = Today plus 30 days

+ 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' interface. At the top, there is a title bar with the text 'Watchlist Manager' and several icons. Below the title bar, there is a form with the following fields and options:

- Name:** A dropdown menu with the text '(Create)' and a downward arrow.
- Description:** A text area containing the text 'PROVIDE MORE DETAILS FOR EASY OF USE LATER'.
- Threshold Type:** Two radio buttons, 'Ascending' (selected) and 'Descending'.
- Warning Threshold:** An empty text input field.
- Critical Threshold:** An empty text input field.
- Advanced Options:** A section header with a right-pointing triangle icon.
- Query to be Used:** A dropdown menu with the text 'matt-future' and a downward arrow.
- Query Details:** A section header with a right-pointing triangle icon.
- Match all of the following:** A list of three items, each with a bullet point:
  - 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 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 type and on your priority customers. You can use sales order category codes to filter out critical customers if your company uses those catcodes. Also use filters like extended price or order quantity to get critical data for your business. You do not want another report on 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 linked to your specific security role profile if cost data is considered confidential to the wider audience.

## ***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.

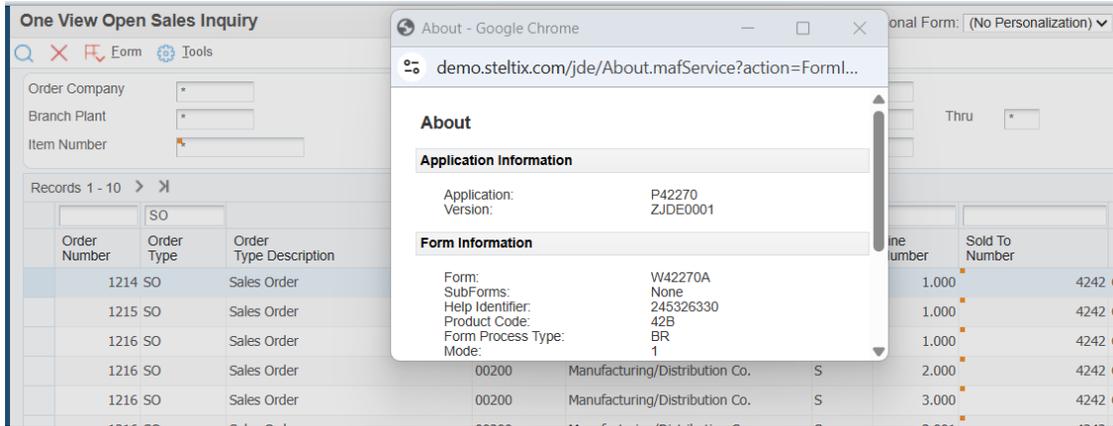
Technology used: One View Inquiry

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 a 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:

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

Records 1 - 10

Order Number	Order Type	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 <= 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

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

Order Number	Order Type	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

Records 1 - 10 > X

Query Manager

Name: (Create) | Set As Default: [ ] | Run When Selected: [x] | Clear Form When Selected: [ ]

Conditions:

- Match All (selected) / Match Any
- Branch Plant (QBE): equal | M30
- Order Type (QBE): equal | SO
- Request Date (QBE): <= | Today minus 30 days
- Actual Ship Date (QBE): is blank

Query Manager

Name: (Create) | Set As Default: [ ] | Run When Selected: [x] | Clear Form When Selected: [ ]

Conditions:

- Match All (selected) / Match Any
- Branch Plant (QBE): equal | M30
- Order Type (QBE): equal | SO
- Request Date (QBE): <= | Today minus 30 days
- Actual Ship Date (QBE): is blank

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 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 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 type and on your priority customers. You can use sales order category codes to filter out critical customers if your company uses those catcodes. Also use filters like extended price or order quantity to get critical data for your business. You do not want another

report on 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 linked to your specific security role profile if cost data is considered confidential to the wider audience.

## ***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 take partial orders (not order lines) and some who do not take partial orders. The customer sends a complaint that their 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 into fields like backorder allowed, partial order line shipment, etc.

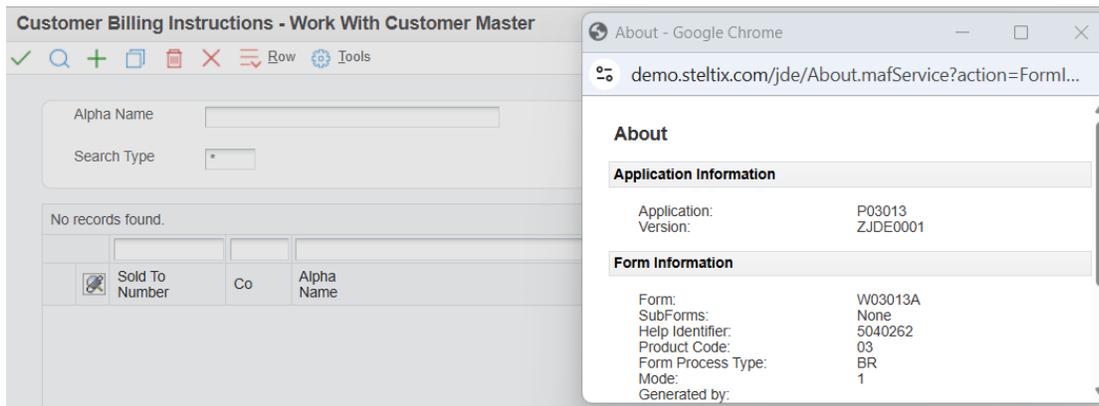
Technology used: Customer Master

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

Table/Application Used: P03013

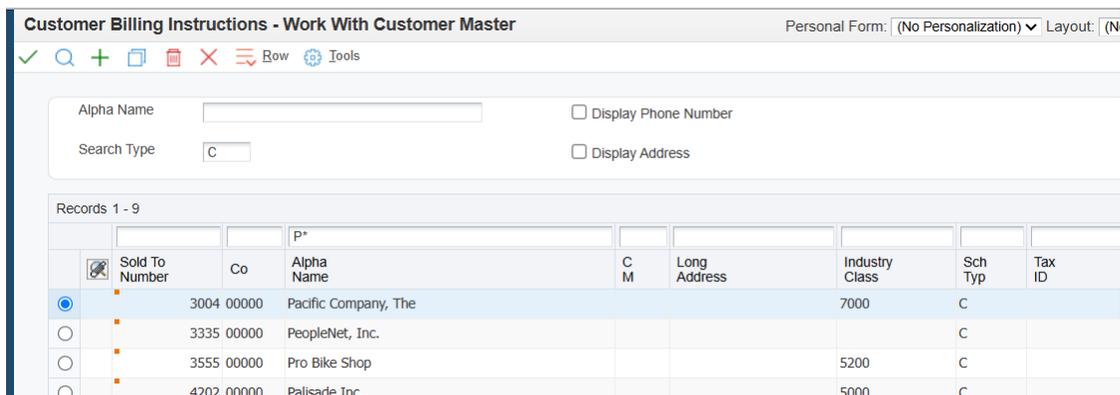
## Step 1

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 a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists

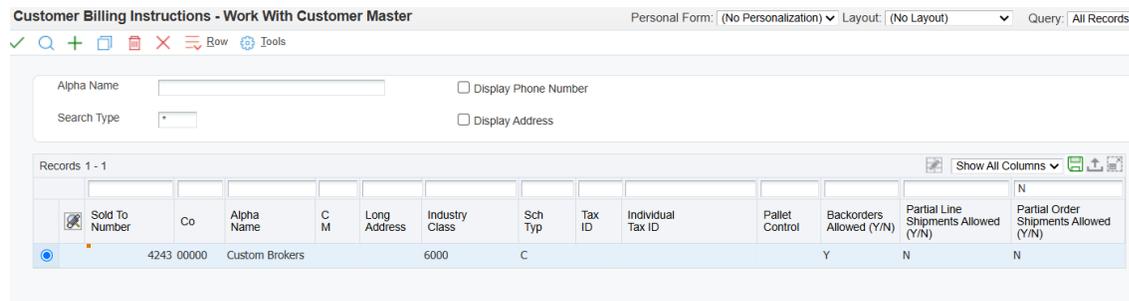


## Step 2

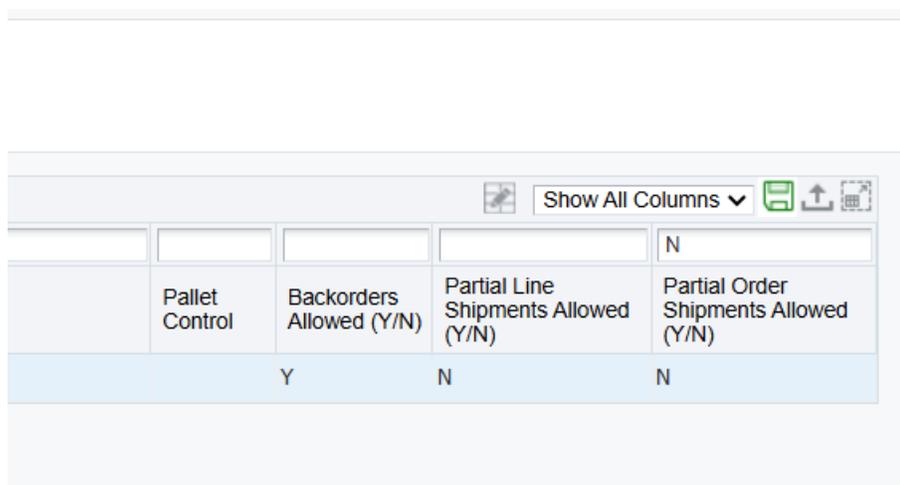
Customize the grid (example below), place some QBE values to get valid data points



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



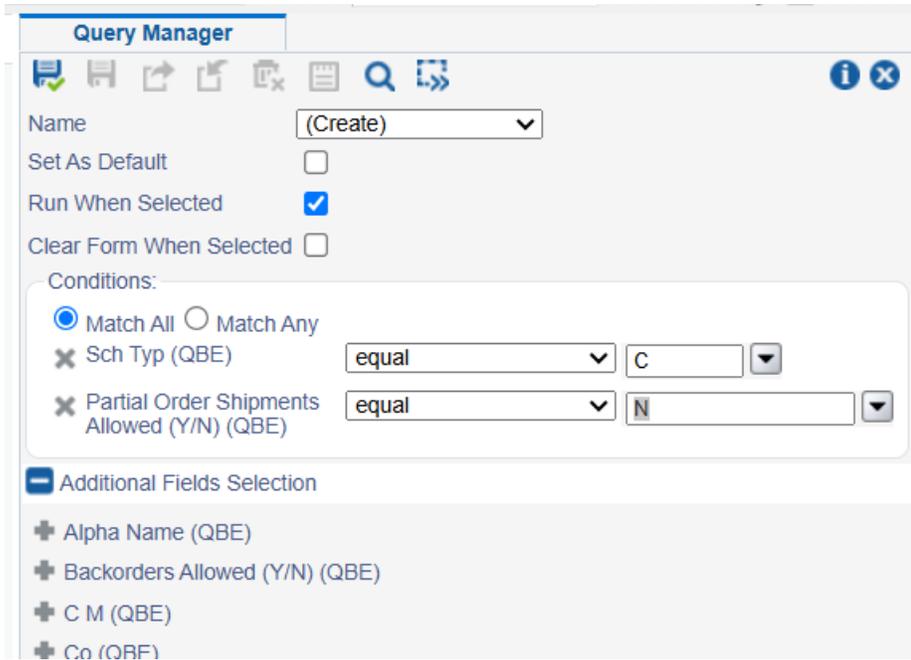
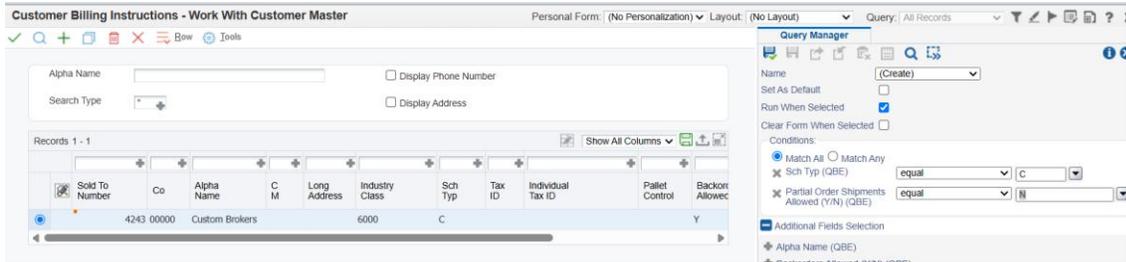
Closer view of the grid extension fields.



### Step 3

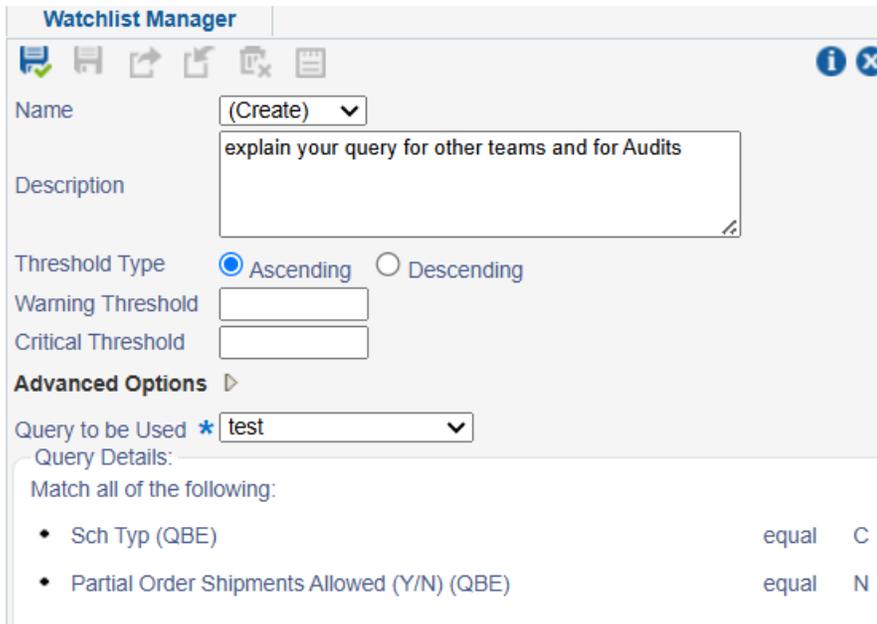
Create a new query. Use the right pane selections to start with.

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



#### Step 4

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



### Step 5

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

## ***On hold Inventory Alert***

Business Requirement:

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

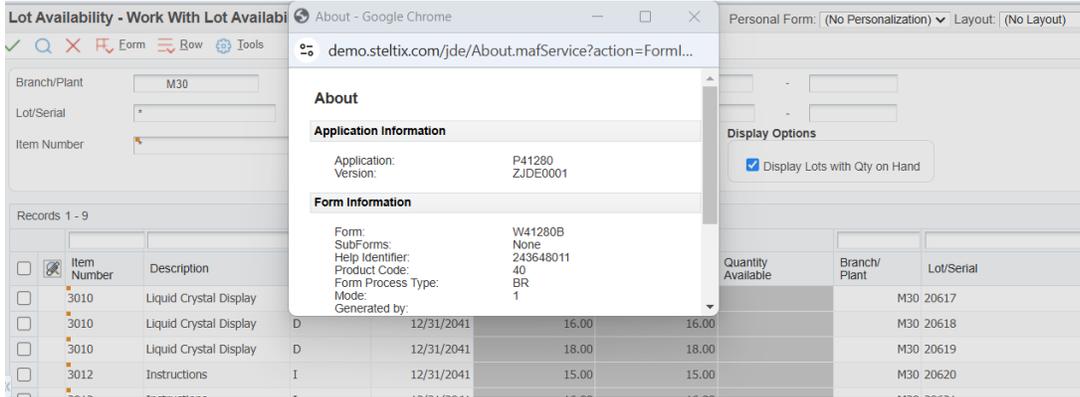
Technology used: UDO watchlist.

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

Table/Application Used: P41280

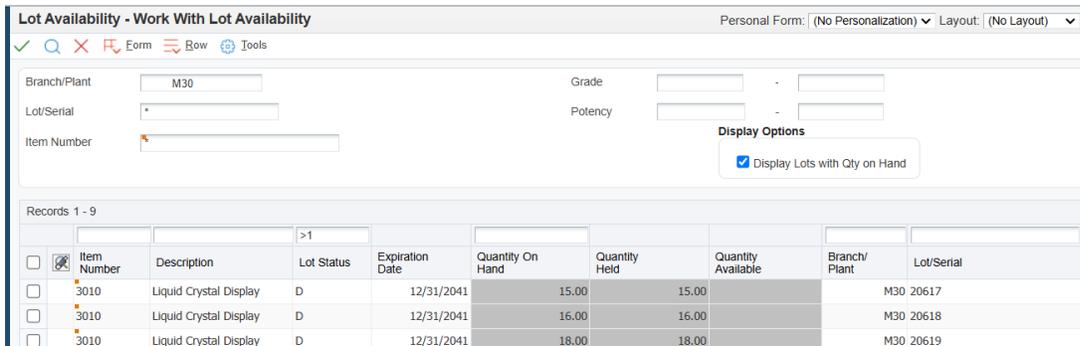
## Step 1

Open Lot availability application



## Step 2

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



## Step 3

Build a query and select these two fields. If you have entered QBE previously it

automatically populates that field. Save the query with a unique recognizable name.

The screenshot shows the 'Query Manager' interface. At the top, there is a toolbar with icons for save, print, share, copy, paste, search, and refresh. Below the toolbar, the 'Name' field is set to '(Create)'. The 'Set As Default' checkbox is unchecked. The 'Run When Selected' checkbox is checked. The 'Clear Form When Selected' checkbox is unchecked. The 'Conditions' section is expanded, showing two conditions: 'Branch/ Plant (QBE)' with the operator 'equal' and an empty value field, and 'Lot Status (QBE)' with the operator 'greater than' and the value '1'. The 'Additional Fields Selection' section is also expanded, showing a list of fields: '3rd Item Number (QBE)', 'Branch/ Plant (QBE)', 'Branch/Plant', 'Description (QBE)', and 'G/L Category (wf) (QBE)'. Each field has a plus sign icon next to it.

#### 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 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 lots 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.

## ***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 goes 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, outdated practice!

Technology used: UDO watchlist.

Limitations: Ensure you have security access to running this application

Table/Application Used: P41271

## Step 1

### Open Lot availability application

The screenshot shows the 'One View Inventory Valuation Analysis Inquiry' application. The main window displays a table with 7 records. The columns are: Branch Plant, Branch Plant Description, Description, Location, Lot Serial Number, and Quantity On Hand. The data is as follows:

Branch Plant	Branch Plant Description	Description	Location	Lot Serial Number	Quantity On Hand
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, showing application and form information:

- 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: 1

## Step 2

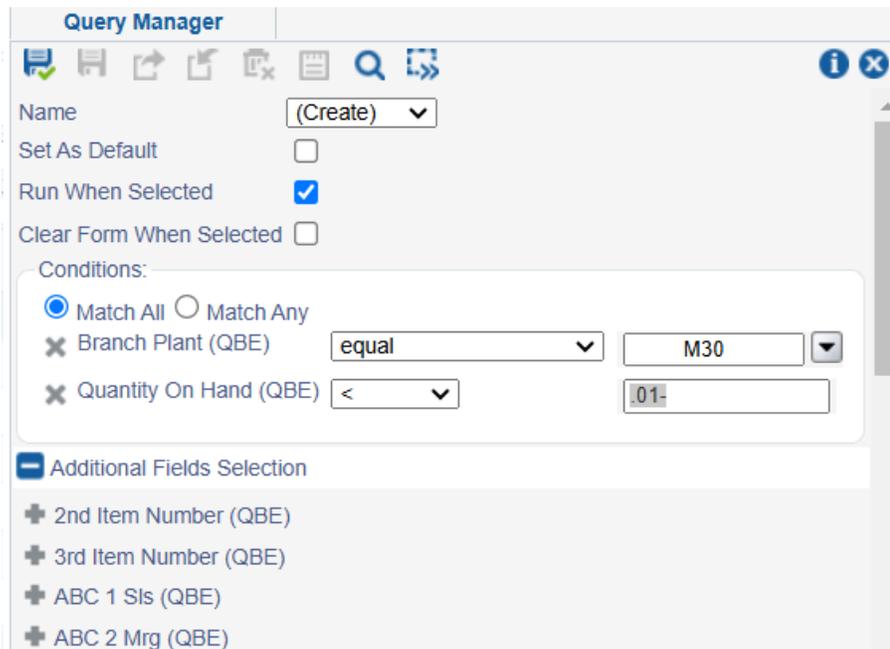
Enter your branch and place <0.01 in qty on hand field. Make grid customization to hide unwanted fields.

The screenshot shows the 'One View Inventory Valuation Analysis Inquiry' application with a customized grid. The grid has 9 columns: Branch Plant, Branch Plant Description, Description, Location, Lot Serial Number, Quantity On Hand, Quantity Soft Committed, and Quantity Hard Committed. The data is as follows:

Branch Plant	Branch Plant Description	Description	Location	Lot Serial Number	Quantity On Hand	Quantity Soft Committed	Quantity Hard Committed
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.



### 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 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 using 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**.

## ***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 on 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 a 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 for short cycle time manufactured products in a high NPI (new product introductions) environment.

Technology used: UDO watchlist.

Limitations: Ensure you have security access to running this application

Table/Application Used: P41052

## Step 1

Open UX one cost inquiry application

The screenshot shows the 'UX One Item Cost Inquiry - Item Cost Inquiry' application window. The main window displays a table of items with columns for Item Number, Item Description, Short Item No, Branch/Plant, and Branch/Plant Description. The first item selected is 1001, 'Bike Rack - Trunk Mount'. An 'About' dialog box is open on the right, showing application and form information.

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

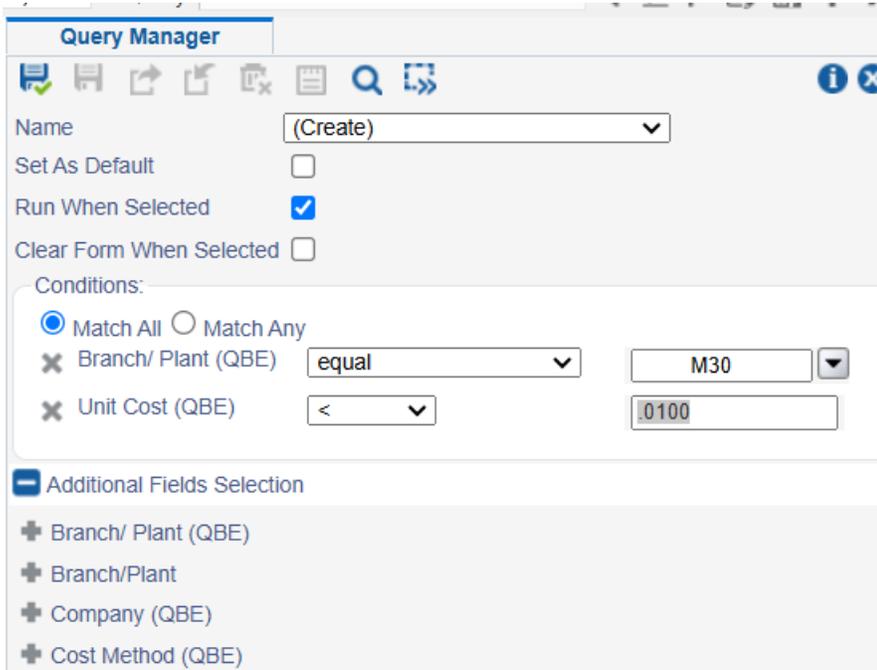
Enter your branch and place <0.01 in unit cost field. Make grid customization to hide unwanted fields. Ensure you have selected show all columns grid.

The screenshot shows the 'UX One Item Cost Inquiry - Item Cost Inquiry' application window with a customized grid. The 'Unit Cost' field is set to '<0.01'. The grid displays a list of items with columns for Item Number, Item Description, Short Item No, Branch/Plant, Unit Cost, Branch/Plant Description, and Location.

Item Number	Item Description	Short Item No	Branch/Plant	Unit Cost	Branch/Plant Description	Location
222	Touring Bike, Green	60054	M30	<.0000	Eastern Manufacturing Center	. .
2200	Tire Pump	60290	M30	.0000	Eastern Manufacturing Center	. .
2203	Threaded Tube	60353	M30	.0000	Eastern Manufacturing Center	. .
2203	Threaded Tube	60353	M30	.0000	Eastern Manufacturing Center	. .
2204	Plunger	60361	M30	.0000	Eastern Manufacturing Center	. .
2204	Plunger	60361	M30	.0000	Eastern Manufacturing Center	. .
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 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.

## ***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 users 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.

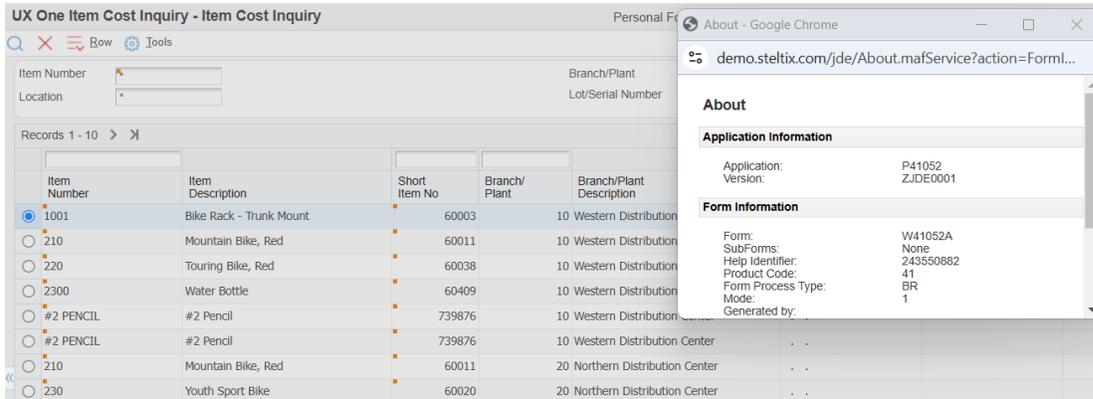
Technology used: UDO watchlist.

Limitations: Ensure you have security access to running this application

Table/Application Used: P41052

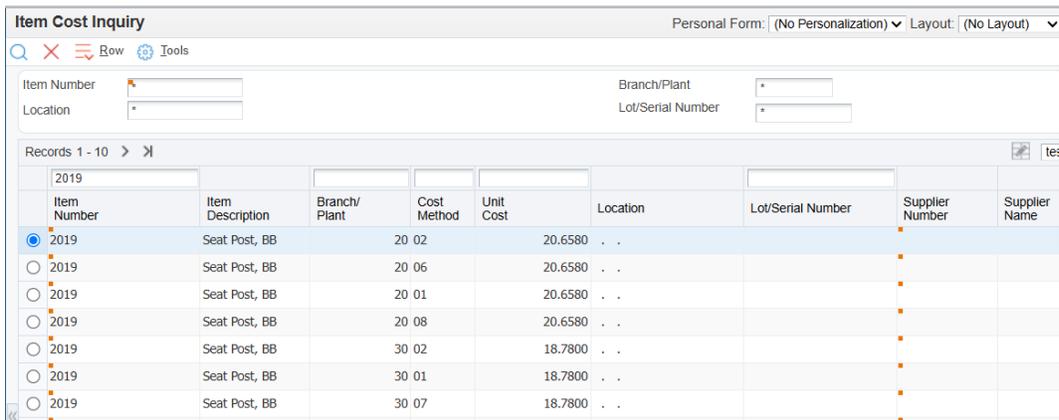
## Step 1

Open UX one cost inquiry application



## Step 2

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



## Step 3

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

The screenshot shows the 'Query Manager' window. At the top, the title is 'Query Manager'. Below the title bar is a toolbar with icons for save, refresh, copy, paste, delete, and search. The main area contains the following fields and options:

- Name: test (dropdown menu)
- Set As Default:
- Run When Selected:
- Clear Form When Selected:
- Conditions:
  - Match All (selected) / Match Any
  - Branch/ Plant (QBE): in list (dropdown), 20 (input), 30 (input)
  - Item Number (QBE): equal (dropdown), 2019 (input)
  - Cost Method (QBE): in list (dropdown), 08 (input), 07 (input)
  - Unit Cost (QBE): >= (dropdown), 15.0000 (input)
- + Additional Fields Selection

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

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 \* test ▾

Query Details:

Match all of the following:

- 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 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 to purchase or IT to keep loading 08 costs, which you already started the cost rollup company-wide on that weekend.

## ***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 users 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 checking the data till the system is stable.

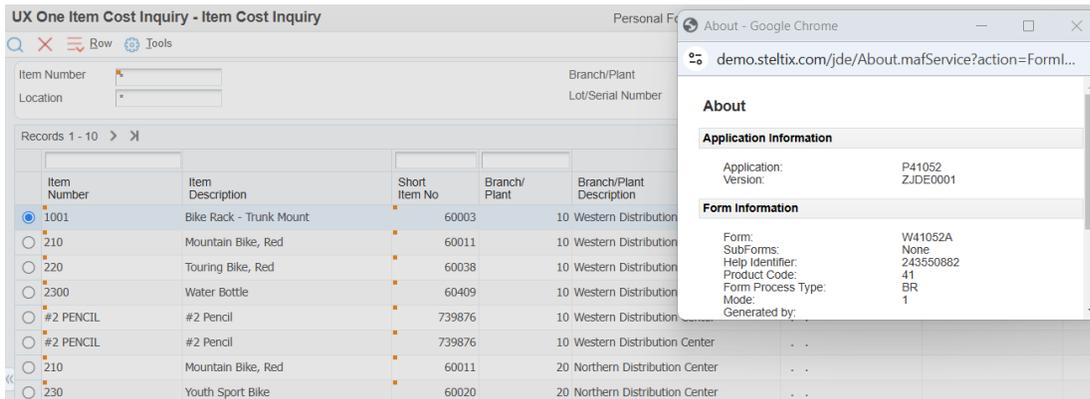
Technology used: UDO watchlist.

Limitations: Ensure you have security access to running this application

Table/Application Used: P41052

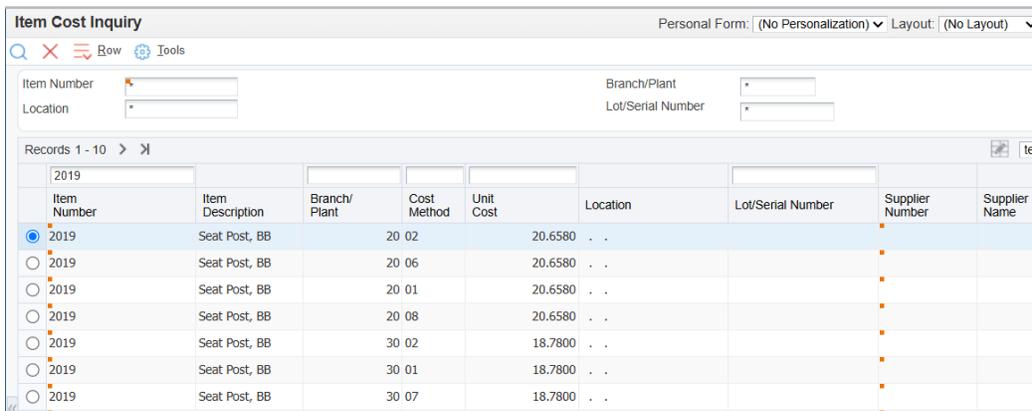
### Step 1

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

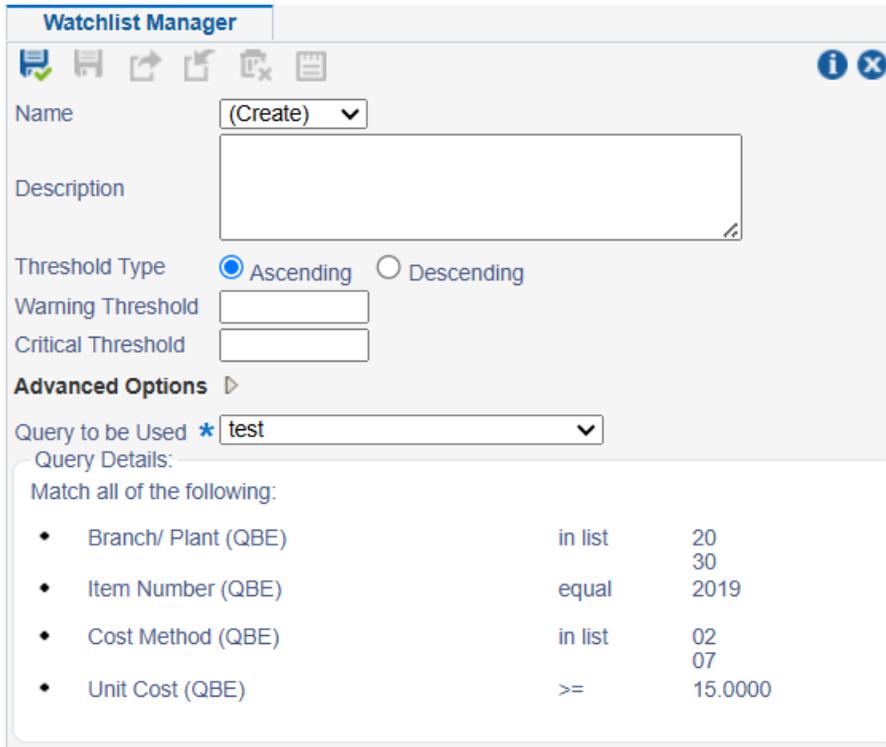
Build a query and select these two fields. If you have entered QBE previously it automatically populates that field. Save the query with a unique recognizable name.

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 (values: 20, 30)
  - Item Number (QBE):** equal (value: 2019)
  - Cost Method (QBE):** in list (values: 02, 07)
  - Unit Cost (QBE):** >= (value: 15.0000)
- Additional Fields Selection:** +

## Step 4

Create a watchlist for this query, give the same name



The screenshot shows the 'Watchlist Manager' window. It includes a toolbar with icons for save, refresh, share, copy, 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 lists the following criteria:

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 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 checks twice a year will help with better trust in the system and configurations

## ***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 VLOOKUP for variations

Technology used: UDO watchlist.

Limitations: Ensure you have security access to running this application

Table/Application Used: P41052

## Step 1

Open UX one cost inquiry application

The screenshot shows the 'UX One Item Cost Inquiry - Item Cost Inquiry' application. The main window displays a table with the following data:

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

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

**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

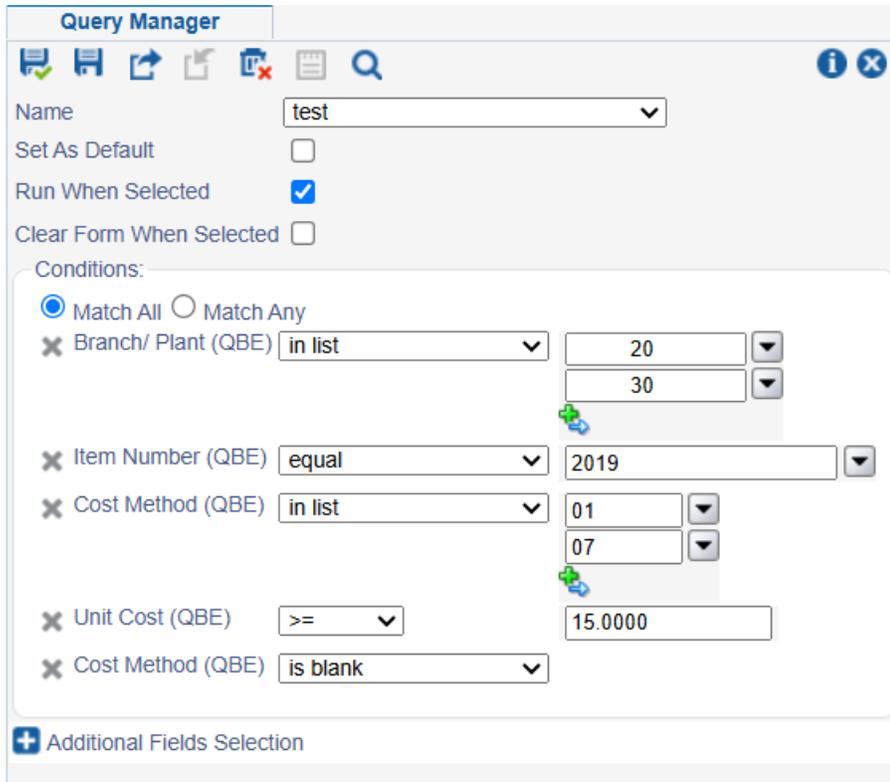
Enter your branch and place >0.01 in unit cost field. Make grid customization to hide unwanted fields. Ensure you have selected show all columns grid.

The screenshot shows the 'Item Cost Inquiry' application. The main window displays a table with the following data:

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	20.6580	. .			
2019	Seat Post, BB	20 06	20.6580	20.6580	. .			
2019	Seat Post, BB	20 01	20.6580	20.6580	. .			
2019	Seat Post, BB	20 08	20.6580	20.6580	. .			
2019	Seat Post, BB	30 02	18.7800	18.7800	. .			
2019	Seat Post, BB	30 01	18.7800	18.7800	. .			
2019	Seat Post, BB	30 07	18.7800	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.



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 [01, 07]
  - Unit Cost (QBE) >= [15.0000]
  - 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 code instead of listing a 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 \* test ▾

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 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.

## ***Zero Price Items Alert***

Business Requirement:

You are in a fast-moving product manufacturing/selling environment. The products get designed and sales orders entered quickly to get into the market. Marketing and sales have not yet provided the price list. Sales orders go into execution and zero invoices go 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 for short cycle time manufactured products in a high NPI (new product introductions) environment.

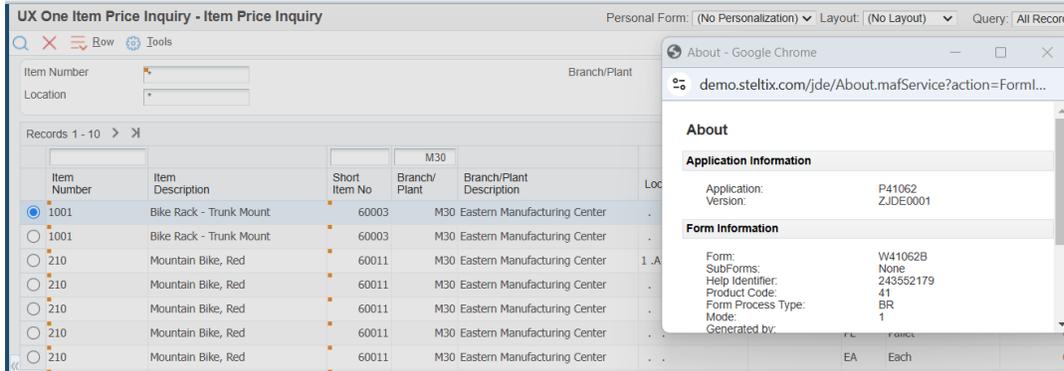
Technology used: UDO watchlist.

Limitations: Ensure you have security access to running this application

Table/Application Used: P41062

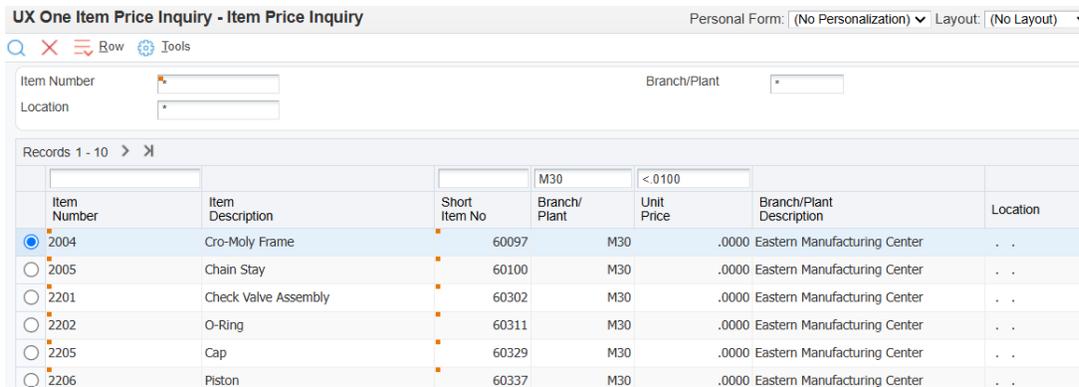
## Step 1

Open UX one price inquiry application



## Step 2

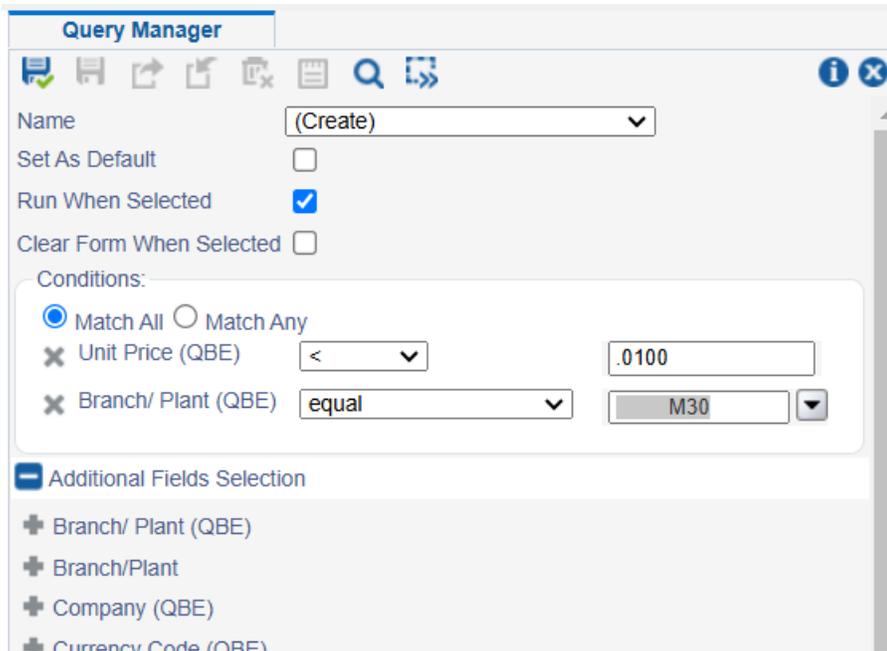
Enter your branch and place >0.01 in unit price field. Make grid customization to hide unwanted fields.



## Step 3

Build a query and select these two fields. If you have entered QBE previously it

automatically populates that field. Save the query with a unique recognizable name.



#### Step 4

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

#### Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to 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 us to quickly do data analysis to compare pricing patterns.

## ***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 proactively if any such blanket order is nearing full usage (price negotiation point) or never used to the full extent (again price negotiation point).

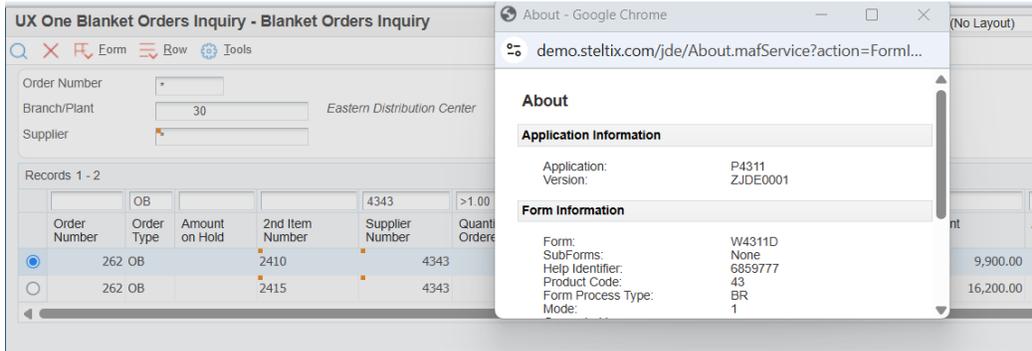
Technology used: Blanket order inquiry UxOne

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 a 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	OB	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.

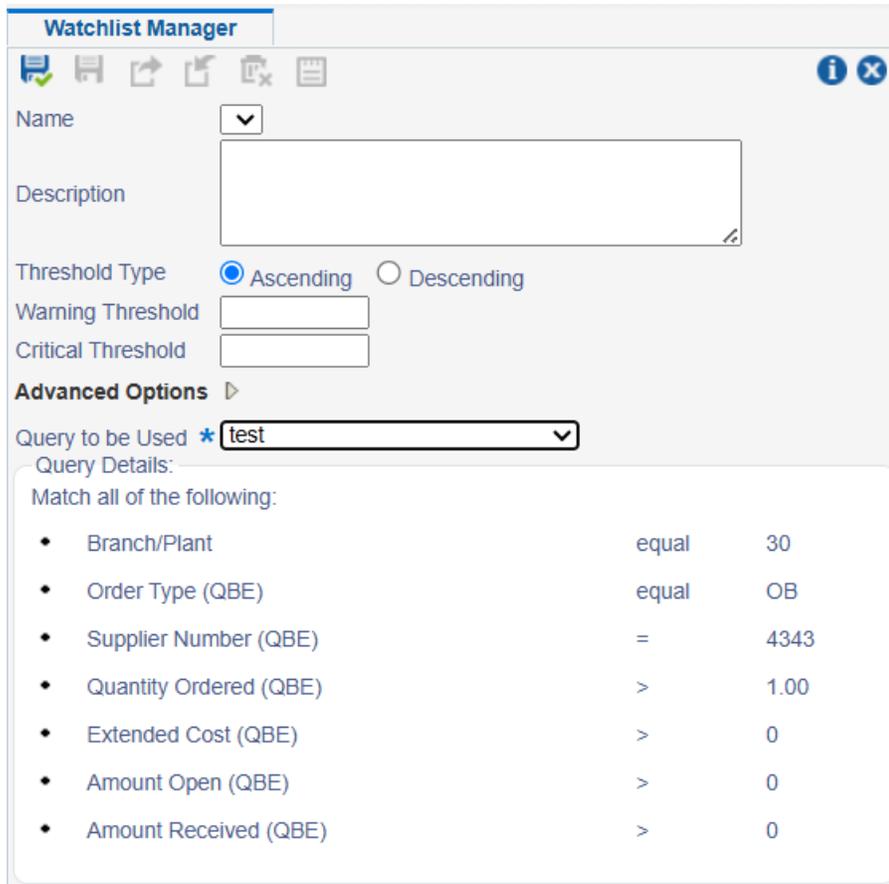
Branch plant, order type, qty ordered, etc. Save the query with a unique understandable name

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, 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
- 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 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 all records option if you feel the watchlist extract is incorrect.

NOTE: Currently watchlist queries do 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.

## ***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 a change in demand and/or problems at the supplier end. That requires a different approach to solving 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 exist, ask IT to deploy to your security role. You will be testing this in a 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 'UX One Purchase Order Detail Inquiry - Purchase Order Detail Inquiry' application interface. A browser window titled 'About - Google Chrome' is open, displaying the 'About' dialog for the application. The dialog contains the following information:

Application Information	
Application:	P4338
Version:	ZJDE0001

Form Information	
Form:	W4338A
SubForms:	None
Help Identifier:	6862618
Product Code:	43
Form Process Type:	BR
Mode:	1

The background application interface shows a search form with fields for Order Number, Agreement Number, and Item Number. Below the search form is a table with columns: Order Number, Order Type, Line Number, Branch Plant, 2nd Item Number, Supplier Number, and Next Status. The table contains three rows of data:

Order Number	Order Type	Line Number	Branch Plant	2nd Item Number	Supplier Number	Next Status
293	OP	1.000	G30	BROCCOLI	64340	230
407	OP	1.000	M30	2020	4343	280
408	OP	1.000	M30	2020	4343	280

## Step 2

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

The screenshot shows the 'UX One Purchase Order Detail Inquiry - Purchase Order Detail Inquiry' application interface with a customized grid. The grid has the following columns: 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, and Related Order Number. The grid contains five rows of data:

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.

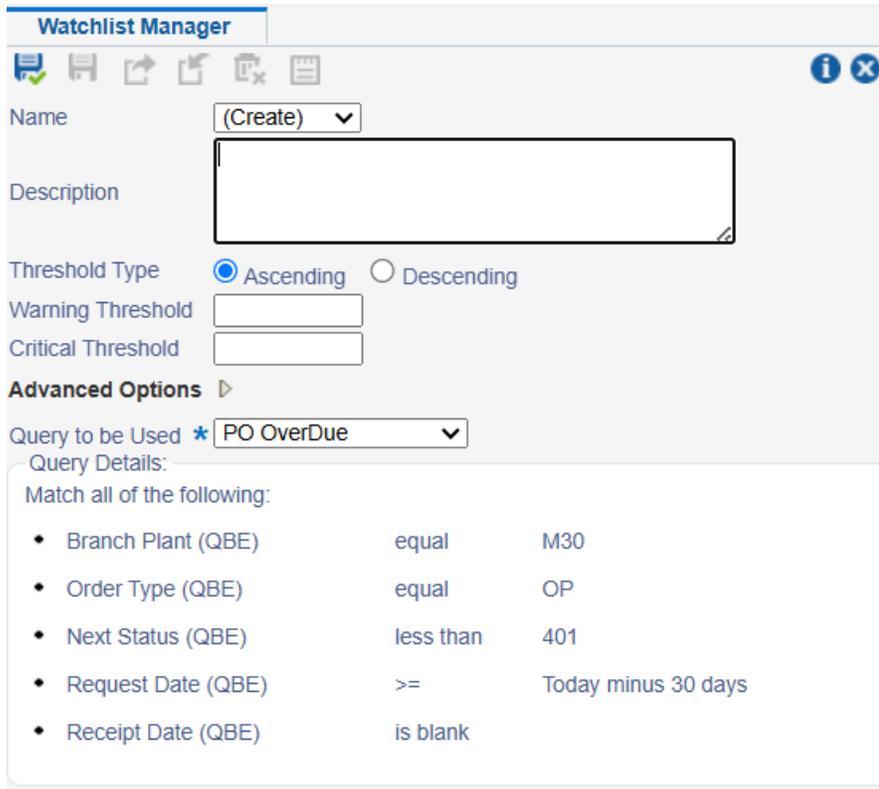
Branch plant, order type, next status (<401 in this example), request date >today minus 30 days (as example). Save the query with a unique understandable name

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

- 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:** (indicated by a plus icon)

## 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' interface. 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' as '\* PO OverDue'. Below this, the 'Query Details' section lists the following conditions:

Field	Operator	Value
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 all records option if you feel the watchlist extract is incorrect.

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

## ***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 a change in demand and/or problems at the supplier end. That requires a different approach to solving 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 a 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 a web application interface for a purchase order detail inquiry. The main window displays a table of records with columns for Order Number, Order Type, Line Number, Branch Plant, 2nd Item Number, Supplier Number, and Next Status. The first record is selected, showing Order Number 293, Order Type OP, Line Number 1.000, Branch Plant G30, 2nd Item Number BROCCOLI, Supplier Number 64340, and Next Status 230. An 'About' dialog box is open in the foreground, displaying application and form information.

Order Number	Order Type	Line Number	Branch Plant	2nd Item Number	Supplier Number	Next Status
293	OP	1.000	G30	BROCCOLI	64340	230
407	OP	1.000	M30	2020	4343	280
408	OP	1.000	M30	2020	4343	280

**About**

**Application Information**

Application: P4338  
Version: ZJDE0001

**Form Information**

Form: W4338A  
SubForms: None  
Help Identifier: 6862618  
Product Code: 43  
Form Process Type: BR  
Mode: 1

## 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 > X 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 delayed

Set As Default:

Run When Selected:

Clear Form When Selected:

Conditions:

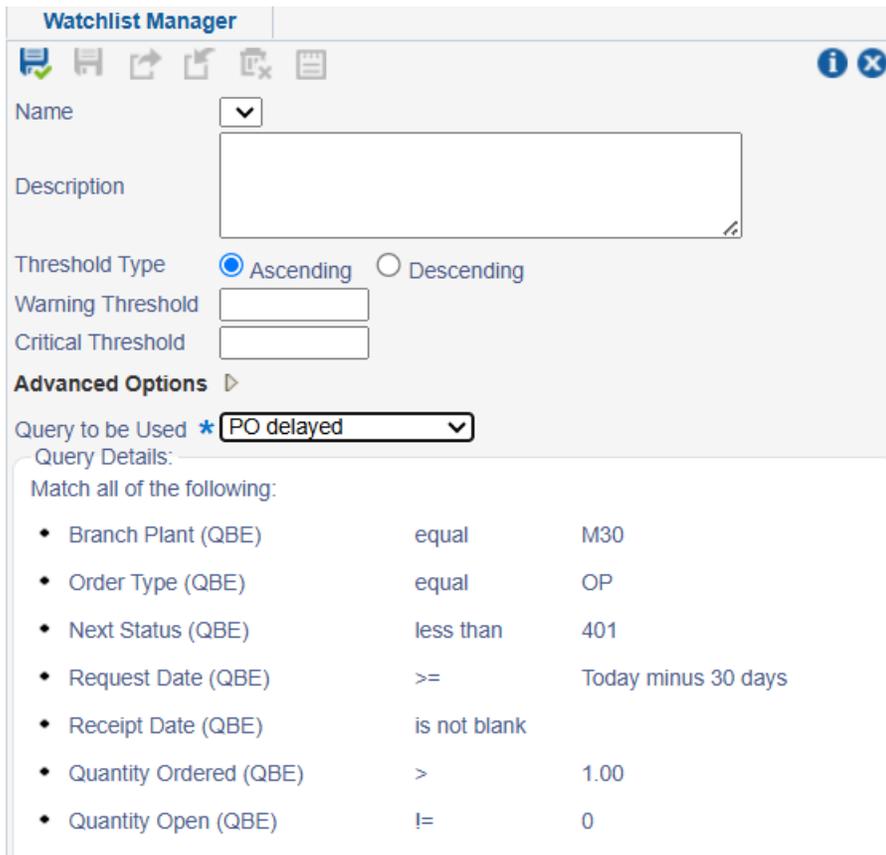
Match All  Match Any

- 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 not blank
- Quantity Ordered (QBE): > 1.00
- 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



The screenshot shows the 'Watchlist Manager' interface. It includes a toolbar with icons for save, refresh, share, copy, delete, and print. The main configuration area contains the following fields and options:

- Name:** A dropdown menu.
- Description:** A large text area for providing details.
- Threshold Type:** Radio buttons for 'Ascending' (selected) and 'Descending'.
- Warning Threshold:** A text input field.
- Critical Threshold:** A text input field.
- Advanced Options:** A section with a dropdown arrow.
- Query to be Used:** A dropdown menu with 'PO delayed' selected.
- Query Details:** A section titled 'Match all of the following:' containing a list of criteria:

Field	Operator	Value
• 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 all records option if you feel the watchlist extract is incorrect.

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

## ***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 exist, ask IT to deploy to your security role. You will be testing this in a 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 'UX One Purchase Order Detail Inquiry - Purchase Order Detail Inquiry' application interface. An 'About' dialog box is open, displaying the following information:

Application Information	
Application:	P4338
Version:	ZJDE0001

Form Information	
Form:	W4338A
SubForms:	None
Help Identifier:	6862618
Product Code:	43
Form Process Type:	BR
Mode:	1

The background application window shows a table with columns: Order Number, Order Type, Line Number, Branch Plant, 2nd Item Number, Supplier Number, and Next Status. The first row is selected, showing Order Number 293, Order Type OP, Line Number 1.000, Branch Plant G30 BROCCOLI, Supplier Number 64340, and Next Status 230.

## Step 2

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

The screenshot shows the 'UX One Purchase Order Detail Inquiry - Purchase Order Detail Inquiry' application interface with a customized grid. The grid has the following columns: 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, and Related Order Number. The first row is selected, showing Order Number 407, Order Type OP, Line Number 1.000, Branch Plant M30 2020, Supplier Number 4343 280, Next Status 280, Quantity Ordered 100.00, Quantity Open 100.00, Order Date 03/05/2025, Request Date 03/05/2025, Original Promised Date 03/05/2025, Receipt Date 03/05/2025, Date Updated 03/13/2025, and Related Order Number 03/13/2025.

### Step 3

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

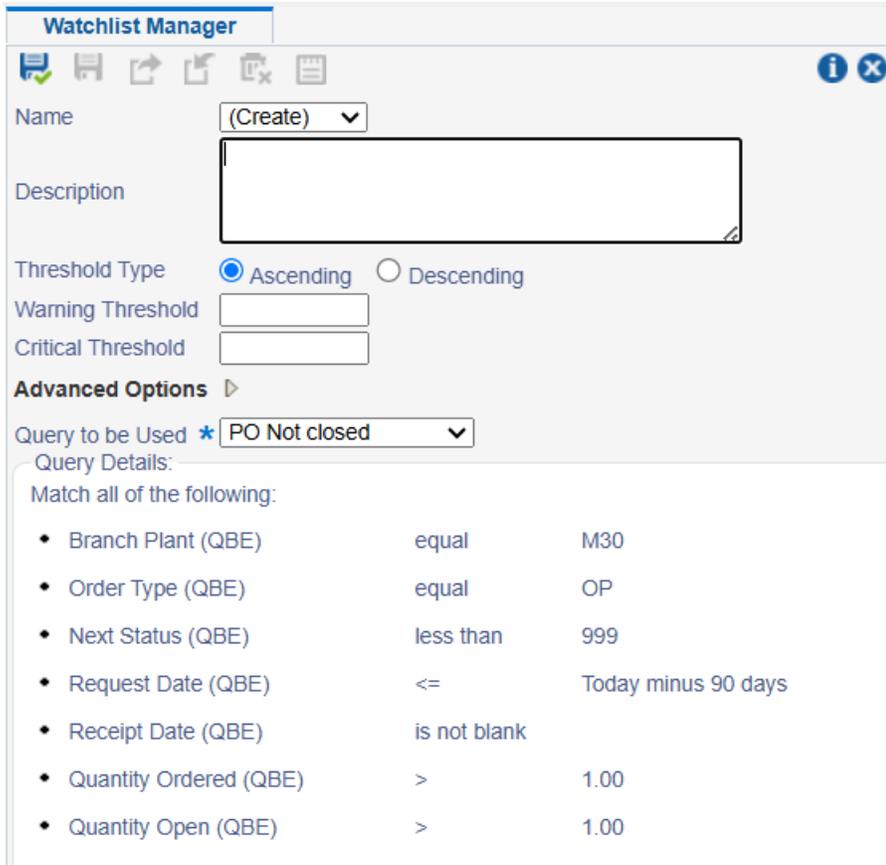
Branch plant, order type, next status (<999 in this example), request date < today minus 90 days (as example). Save the query with a unique understandable name

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

- Name:** PO Not closed
- 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 999
  - Request Date (QBE) <= Today minus 90 days
  - Receipt Date (QBE) is not blank
  - Quantity Ordered (QBE) > 1.00
  - Quantity Open (QBE) > 1.00
- 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 \*  ▾

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 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 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!

## ***Supplier \$ performance, discounts Alert***

Business Requirement:

As a purchasing manager or lead you need to know how your key suppliers perform financially. How much have they invoiced in that year and how much have they 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 redefining 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 for a 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 a 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 Supplier Ledger Inquiry' application interface. On the left, there is a search form with fields for 'Supplier Number' and 'Company'. Below the form is a table with the following data:

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

On the right, an 'About' dialog box is open, displaying the following information:

- 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: [blank]

## Step 2

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

The screenshot shows the 'One View Supplier Ledger Inquiry' application with a customized grid. The grid has the following columns: Business Unit, FY, Per No, Invoice Date, Discount Due Date, Supplier Number, Supplier Name, Base Curr, Gross Amount, Open Amount, and Discount Available. The data is as follows:

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

Additional filters and options are visible: 'Supplier Number' and 'Company' search fields, 'As If Currency', 'As If Exchange Rate Date', and 'As Of Date' dropdowns, and a 'Pay Status' section with radio buttons for 'All' (selected) and 'Open'. A 'test' button is also present in the top right corner of the grid area.

## 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

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
  - 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 all records option if you feel the watchlist extract is incorrect.

## ***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 business do they have 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 with 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's 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 a 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 Customer Ledger Inquiry' application interface. On the left, there are search filters for Customer Number, Company, and Collection Manager. Below these is a table with columns: Parent Number, FY, Per No, Or Ty, Invoice Date, and Customer Number. The table contains two rows of data. On the right, an 'About' dialog box is open, displaying 'Application Information' and 'Form Information'.

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

**About**

**Application Information**

Application: P03B2022  
Version: ZJDE0001

**Form Information**

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

## Step 2

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

The screenshot shows the 'One View Customer Ledger Inquiry' application with a customized grid. The grid includes columns for Parent Number, FY, Per No, Or Ty, Invoice Date, Customer Number, Gross Amount, Open Amount, Discount Available, Units, Minimum Order Value, and Customer Master Credit Manager. The table contains seven rows of data. The interface also shows search filters and a 'Pay Status' section with radio buttons for 'All', 'Open', and 'Paid'.

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

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 are shown below. Please expand based on your business needs.

Use list in the FY and Period number, to enter multiple data points.

Query Manager

📄
📁
🔍
🔗
🗑️
📄
🔍
🔗

i
x

Name (Create) ▼

Set As Default

Run When Selected

Clear Form When Selected

Conditions:

Match All  Match Any

Customer Number (QBE)    =    ▼   

Gross Amount (QBE)    =    ▼   

FY (QBE)    =    ▼   

Per No (QBE)    =    ▼

+ 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 all records option if you feel the watchlist extract is incorrect.

## ***Re-Order Point Alert***

Business Requirement:

Outside MRP, JDE has the PO Generator. If the item branch planning values are not set to MRP but with re-order quantity and re-order levels, the 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 limitations 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

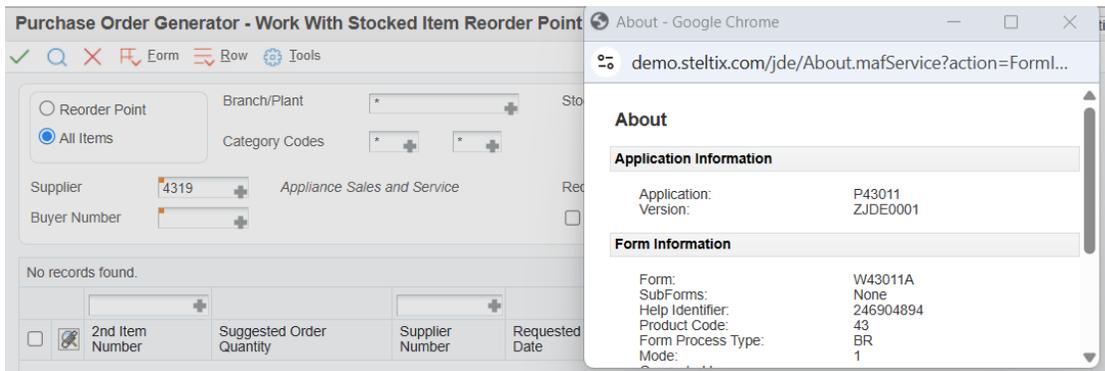
Limitations: None. This tool is used for non-MRP items. Reorder point levels and quantity need to be defined in item branch records. Order policy code should not be MRP.

Limitations: None. Please check security granted to right roles

Table/Application Used: P43011

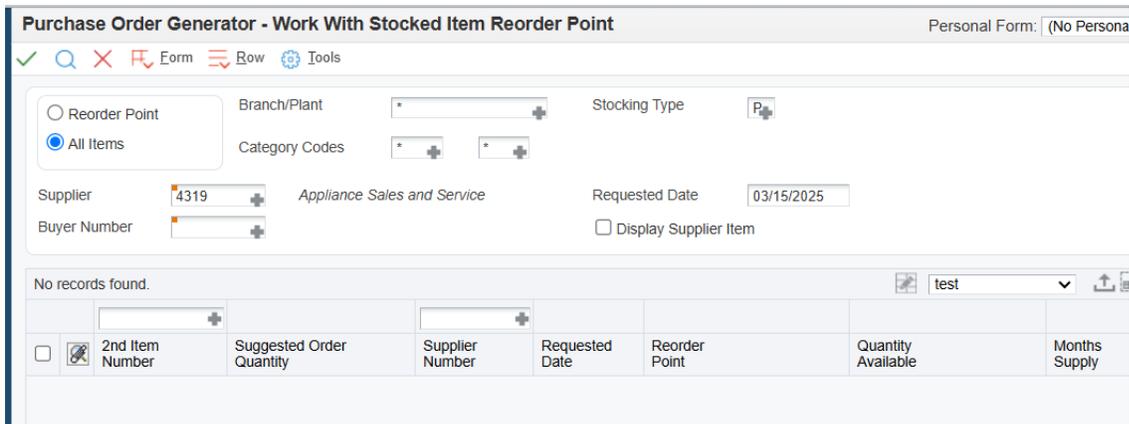
## Step 1

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 a 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

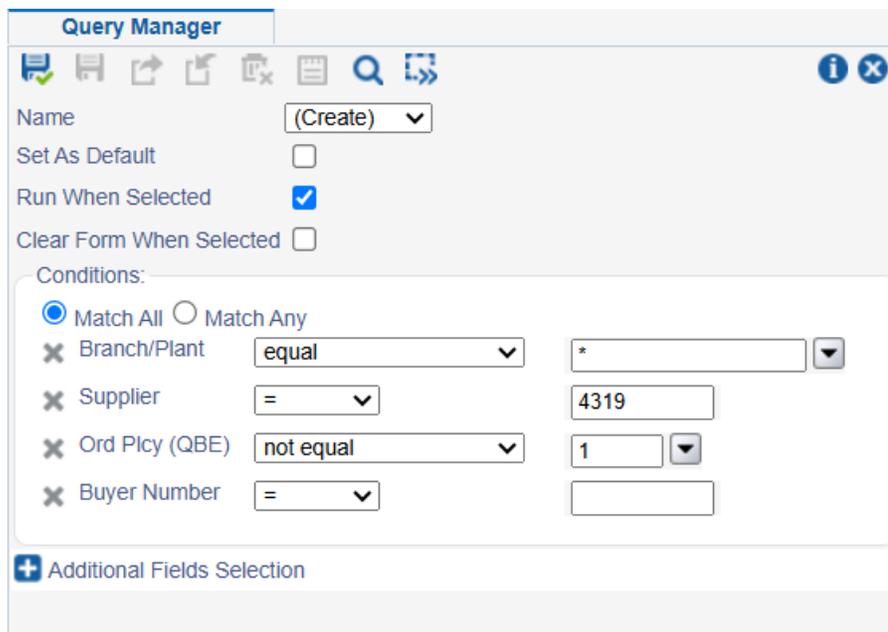


### Step 3

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

Some easy filters are shown below. Please expand based on your business needs.

Do not use the buyer number if the buyers change all the time. Or use generic buyer numbers 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 Pcly (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 all records option if you feel the watchlist extract is incorrect.

## ***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. The system sends email notification to senior level executives and there are also mobile approval tools.

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

Technology used: Orders Awaiting Approval

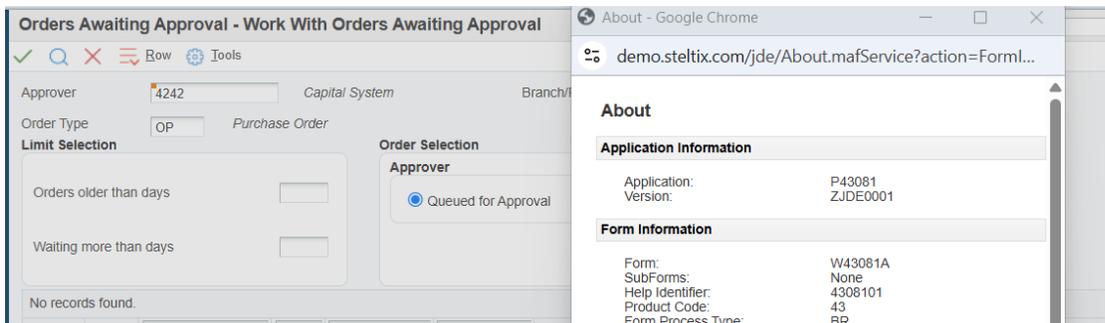
Limitations: None. Please check security granted to right roles, these are inquiry application and not exactly approval application

Limitations: None. Please check security granted to right roles

Table/Application Used: P43081

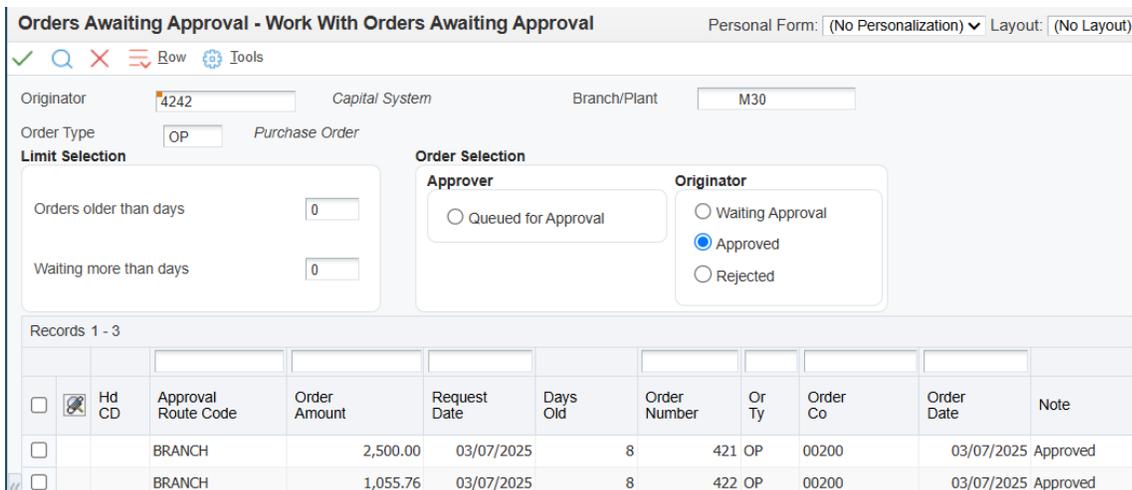
## Step 1

Open this application from your menu. If it does not exist, ask IT to deploy to your security role. You will be testing this in a 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

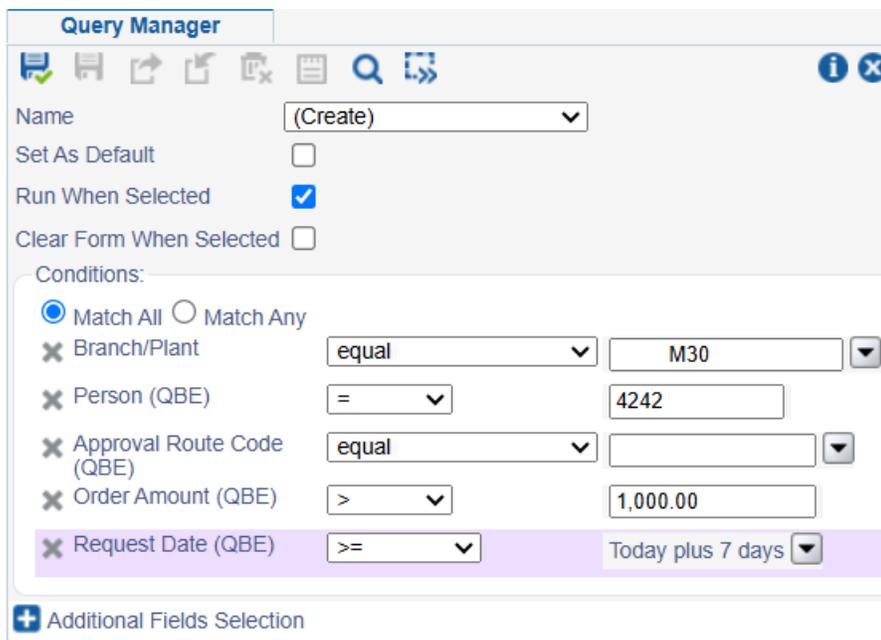


### Step 3

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

Some easy filters are 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' interface. 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: 'Branch/Plant' (equal, M30), 'Person (QBE)' (=, 4242), 'Approval Route Code (QBE)' (equal, empty), 'Order Amount (QBE)' (>, 1,000.00), and 'Request Date (QBE)' (>=, Today plus 7 days). The 'Request Date (QBE)' filter is highlighted in purple. 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 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 all records option if you feel the watchlist extract is incorrect.

## ***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 a 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 Item Usage Trace Inquiry' application interface. The main window displays a table of item usage records. A dialog box titled 'About' is open, showing application and form information.

**One View Item Usage Trace Inquiry**

Document Company: 00200 Manufacturing/Distribution Co.  
Item Number: [Empty]

Records 1 - 10 > X

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: 22.0000 3

## 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: \*

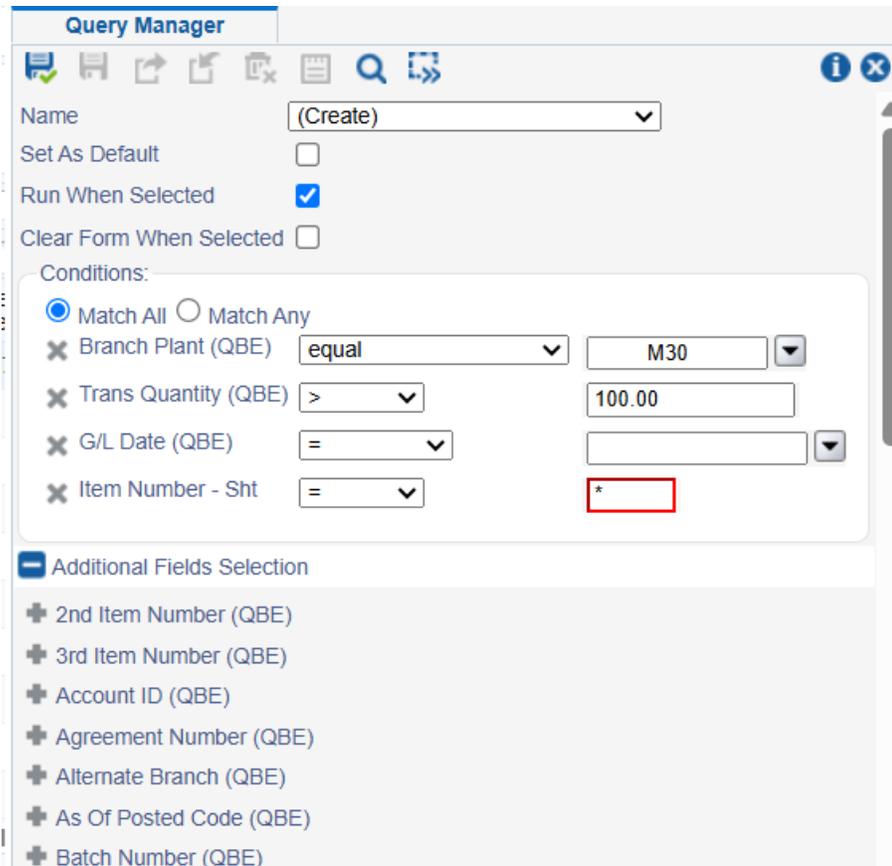
Records 1 - 10

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	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
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 numbers, which could be a problem. You may switch over the CAFE1 view instead of watchlist on this subject. Or this inquiry could be customized to get the second item number.



#### Step 4

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

## Step 5

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

## ***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 a 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 Backordered Items Not Received Inquiry' application. It features a search form with fields for Item Number, Sold To Address, and Supplier Address. Below the form is a table with columns: Sold To Number, Ship To Number, Supplier Number, Item Number, and 2nd Item Number. The table contains two rows of data. An 'About' dialog box is open, showing the following information:

Application Information	
Application:	P43264
Version:	ZJDE0001

Form Information	
Form:	W43264A
SubForms:	None
Help Identifier:	247004794
Product Code:	43
Form Process Type:	BR

## Step 2

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

The screenshot shows the 'One View Backordered Items Not Received Inquiry' application with a customized grid. The grid includes columns for Order Type, Order Number, Next Stat, Purchase Order Type, Purchase Order Number, Purchase Order Next Status, As of Date for Backorder Aging, and Backorder Age (Days Past Req Date). The table contains three rows of data.

Sold To Number	Ship To Number	Supplier Number	Item Number	2nd Item Number	Order Type	Order Number	Next Stat	Purchase 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.

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  Match Any
  - Sold To Number (QBE) = ▾ [ ]
  - Ship To Number (QBE) = ▾ [ ]
  - Supplier Number (QBE) = ▾ [ ]
  - 2nd Item Number (QBE) equal ▾ 2300 ▾
  - Purchase Order Type (QBE) equal ▾ [ ] ▾
  - Request Date (QBE) <= ▾ Today minus 60 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 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 all records option if you feel the watchlist extract is incorrect.

## ***MRP PurOrd Messages B & O count Alert***

Business Requirement:

As a 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 in the T past due to typing messages.

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

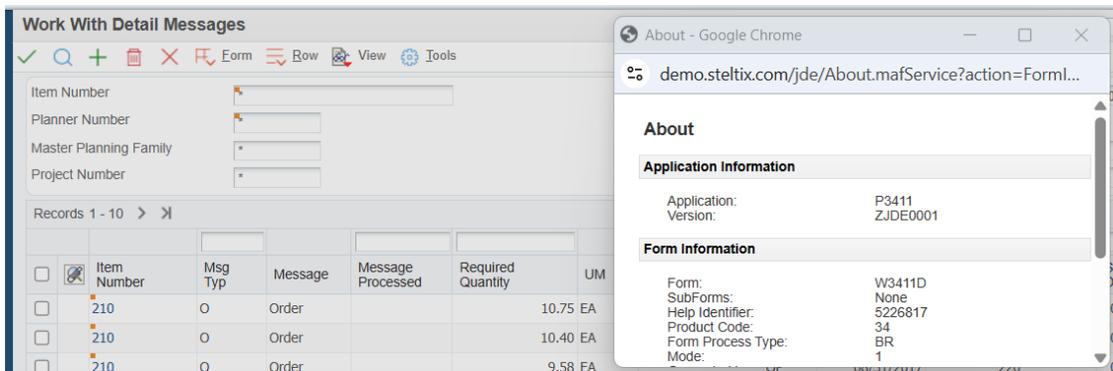
Technology used: MRP messages application

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

Table/Application Used: P3411

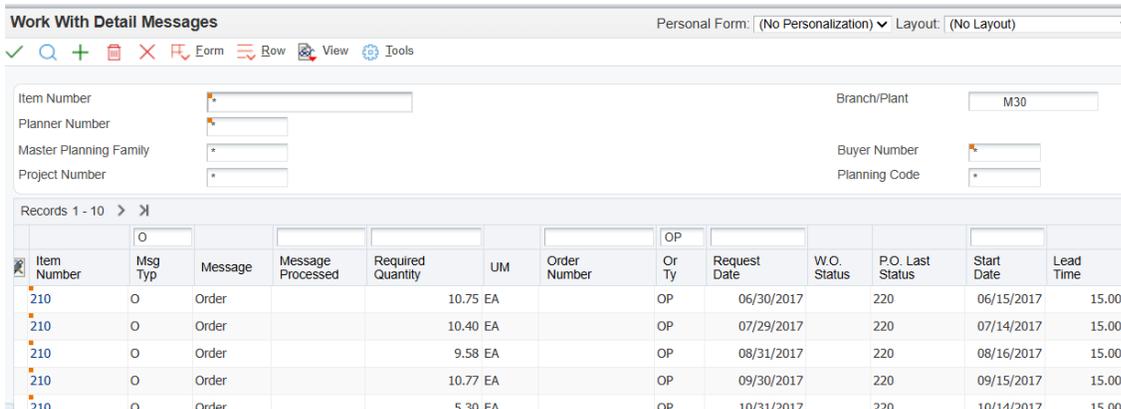
## Step 1

Open this application from your menu. If it does not exist, ask IT to deploy to your security role. You will be testing this in a 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. The main window displays a table of records 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 'Query Manager' pane on the right is open, showing the following configuration:

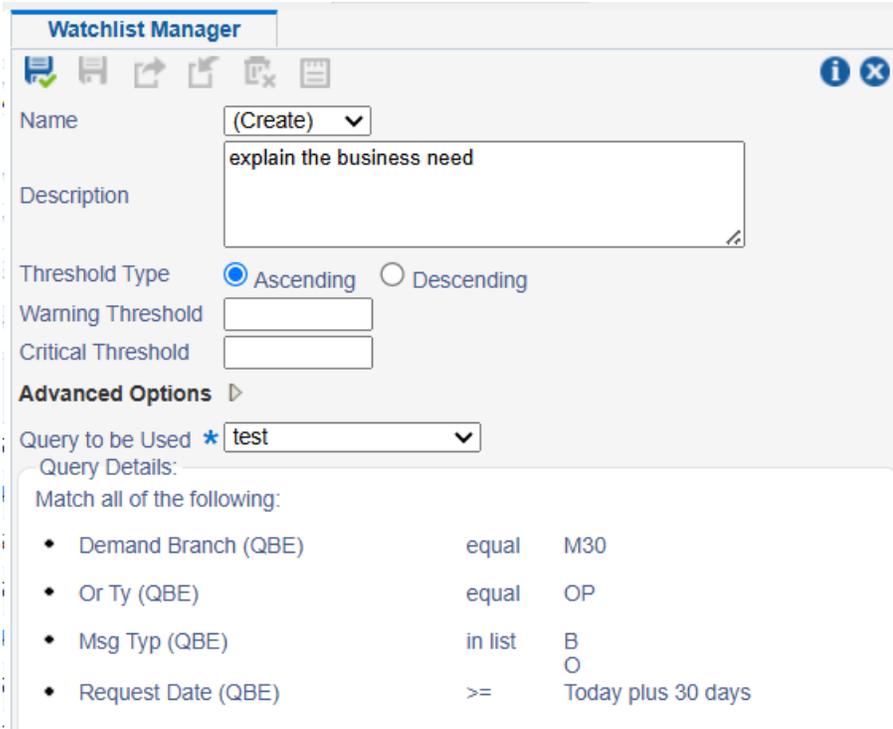
- Name: (Create)
- Set As Default:
- Run When Selected:
- Clear Form When Selected:
- Conditions:
  - Match All (selected) / Match Any
  - Demand Branch (QBE): equal, M30
  - Or Ty (QBE): equal, OP
  - Msg Typ (QBE): in list, B, O
  - Request Date (QBE): >=, Today plus 30 days
- Additional Fields Selection: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

This is a close-up view of the 'Query Manager' pane. It shows 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



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

- Name:** (Create) [v]
- Description:** explain the business need
- Threshold Type:**  Ascending  Descending
- Warning Threshold:** [ ]
- Critical Threshold:** [ ]
- Advanced Options:** [v]
- Query to be Used:** \* test [v]
- 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 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 needs. 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 gives the count total. If you see the static value for a few days that means your nightly MRP batch is not running or failing for some date periods configurations.

## ***MRP PurOrd Messages PAST DUE count Alert***

Business Requirement:

As a 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 in the T past due to typing 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 a 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.

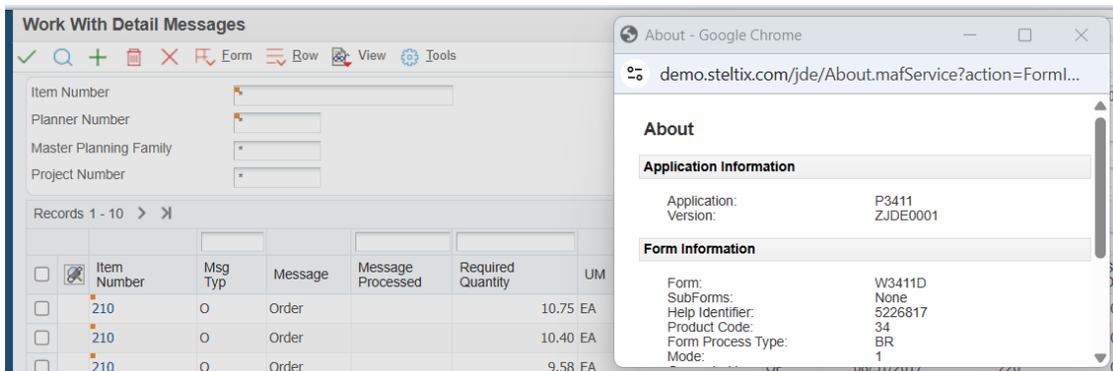
Technology used: MRP messages application

Limitations: None. Please check security granted to right roles

Table/Application Used: P3411

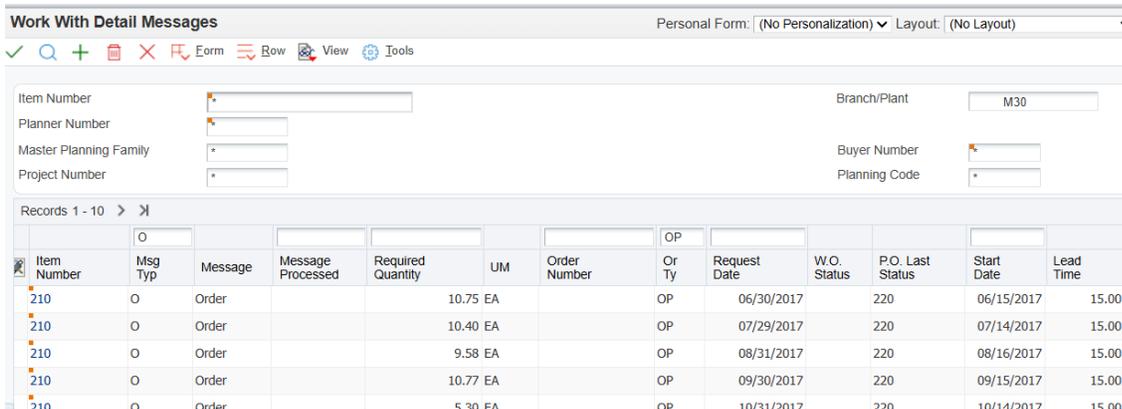
## Step 1

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 a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



## Step 2

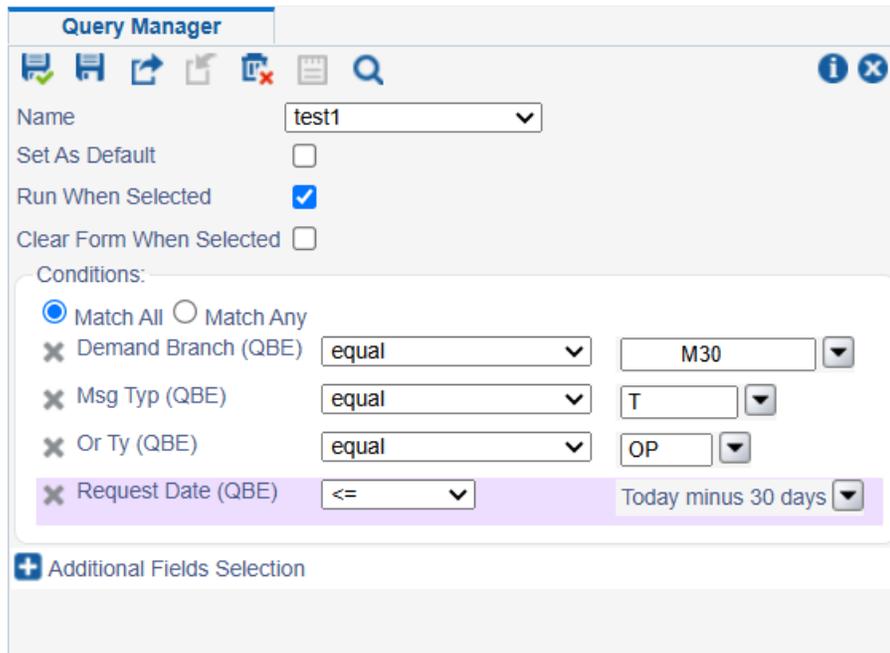
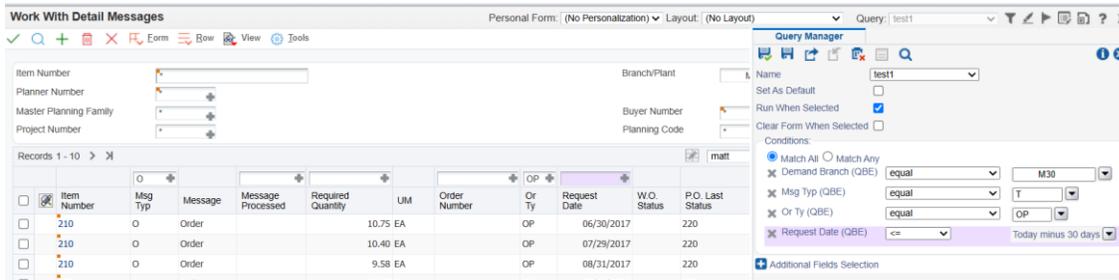
Customize the grid (example below), place some QBE values to get valid data points



## Step 3

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

Branch plant, order type, message type, request date >today minus 30 days (as example). Save the query with a unique understandable name



#### Step 4

Create a new watch list. Use the previously generated query. On the description

box, provide more clarity so that any other user can modify this at a later stage

The screenshot shows the 'Watchlist Manager' window. It includes a toolbar with icons for save, refresh, print, delete, and help. The main configuration area contains the following fields and options:

- Name:** A dropdown menu currently set to '(Create)'.
- 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 section header with a right-pointing triangle.
- Query to be Used:** A dropdown menu with a star icon and the value 'test1'.
- Query Details:** A box containing the text 'Match all of the following:' followed by a list of conditions:
  - 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 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 the purchasing team on the delayed purchase orders. You can copy this watchlist to get another view of delays of 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 ships partial quantities and doesn't invoice for the entire partial quantities yet. And months go by if there are vendor reorganization and business issues.

## ***MRP Workorder Messages B & O count Alert***

Business Requirement:

As a 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 in the T past due to type messages.

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

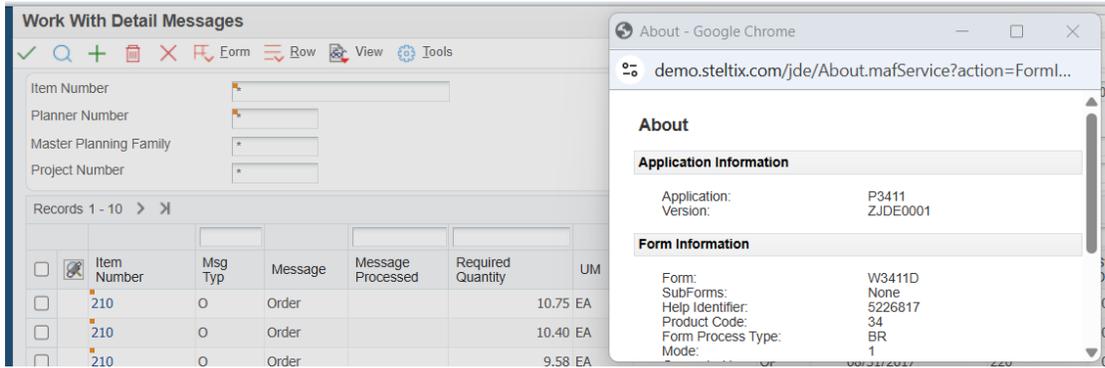
Technology used: MRP messages application

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

Table/Application Used: P3411

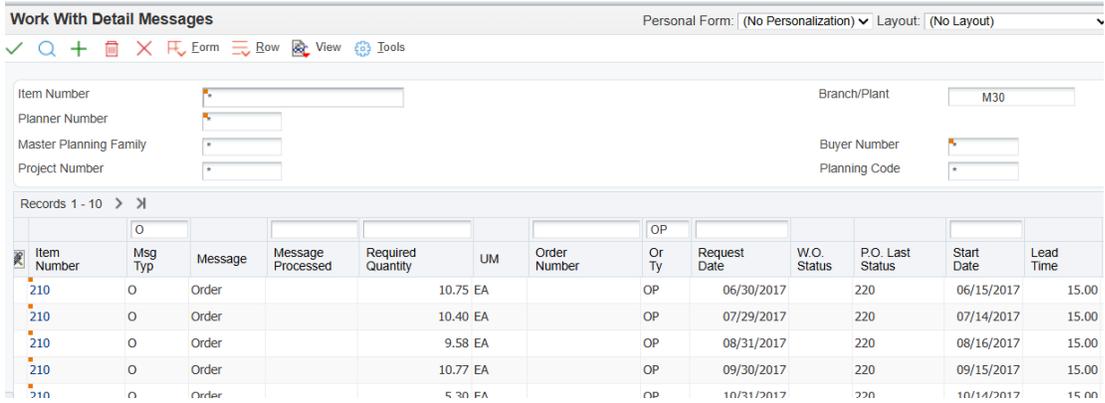
Step 1

Open this application from your menu. If it does not exist, ask IT to deploy to your security role. You will be testing this in a 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

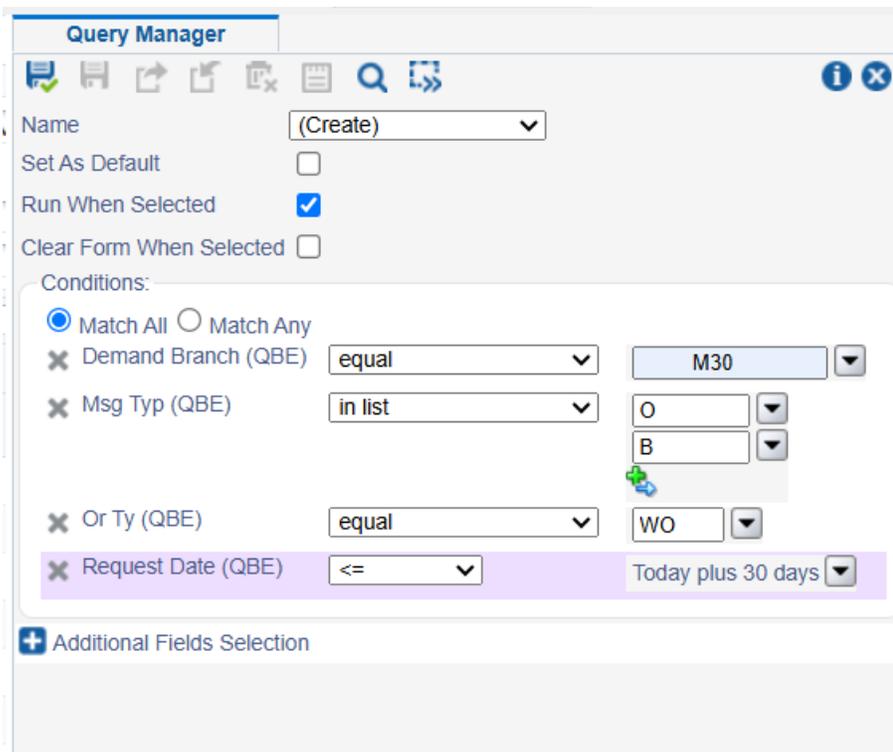
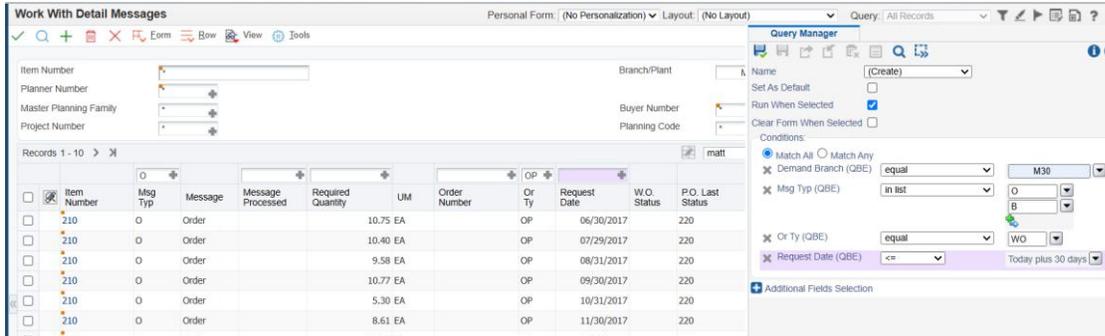
Customize the grid (example below), place some QBE values to get valid data points



### 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





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 needs. 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 gives the count total. If you see the static value for a few days that means your nightly MRP batch is not running or failing for some date periods configurations.

## ***MRP Work Ord Messages PAST DUE count***

Business Requirement:

As a 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 in the T past due to 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.

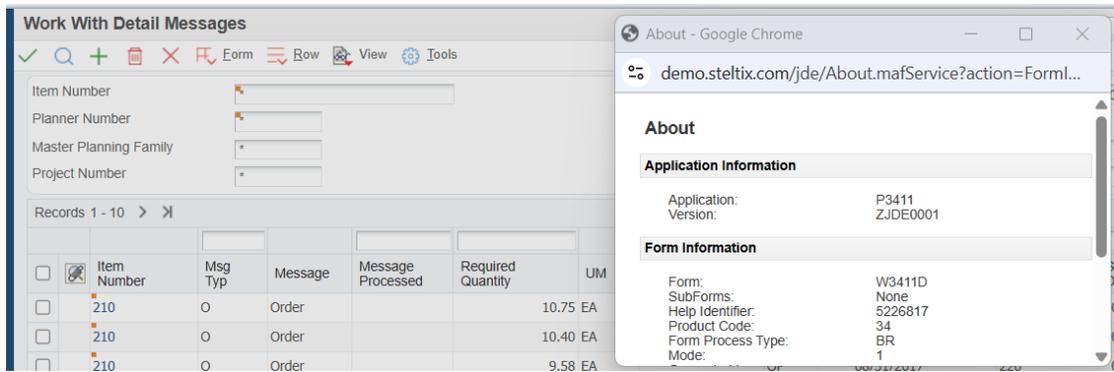
Technology used: MRP messages application

Limitations: None. Please check security granted to right roles

Table/Application Used: P3411

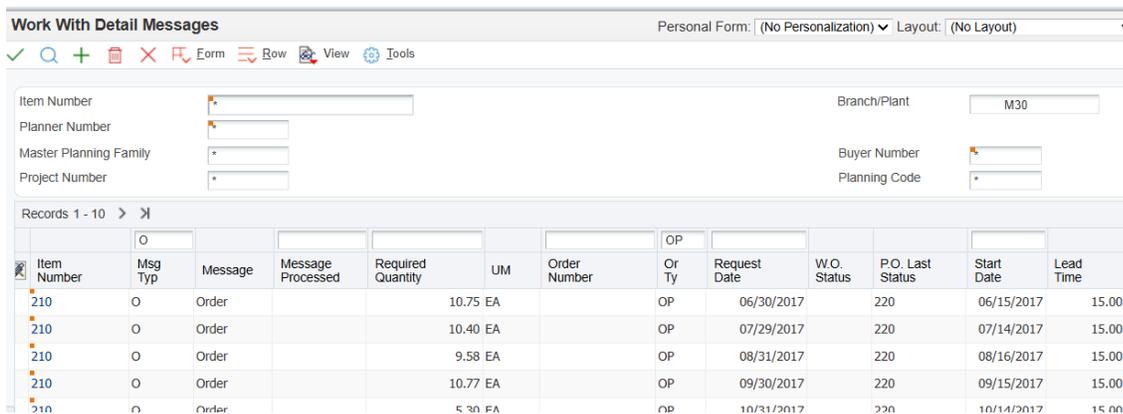
### Step 1

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 a 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

Work With Detail Messages

Personal Form: (No Personalization) Layout: (No Layout) Query: test1

Item Number:  Branch/Plant:

Planner Number:  Buyer Number:

Master Planning Family:  Planning Code:

Project Number:

Records 1 - 10 > X

Item Number	Msg Typ	Message	Message Processed	Required Quantity	UM	Order Number	Cr Ty	Request Date	W.O. Status	P.O. Last Status
210	O	Order		10.75	EA		OP	06/30/2017		220
210	O	Order		10.40	EA		OP	07/29/2017		220
210	O	Order		9.58	EA		OP	08/31/2017		220
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

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 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 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 needs. 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 statuses 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 typically be cleared by the month end to get clearer variance and WIP accounting transactions.

## ***MRP items MDF less than LT Alert***

### Business Requirement:

One of the MRP performance indicators is to have a 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 about having a 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

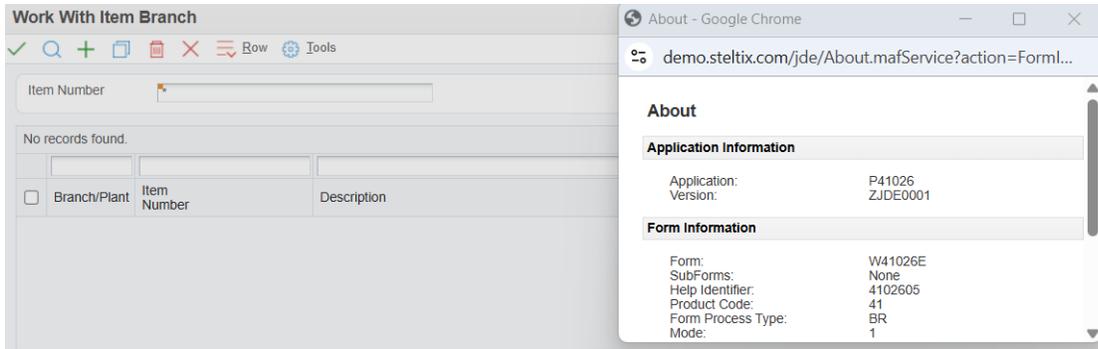
Technology used: Item Branch application

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 a 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)

Item Number

Records 1 - 5

	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		1	1		15 C	3	60	5
60185		I	1	1			2		5
60071		I	1	1			2		15
60134		I	1	1			2		5
60142	10 U		1	1		15 C	3	60	5

test									
Short Item No	Freeze Time Fence Days	Issue Type Code	Order Policy Code	Order Policy Code	Planning Time Fence Days	Planning Time Fence Rule	Planning Code	Message Time Fence Days	Leadtime Level
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  Refresh

Name  ▼

Set As Default

Run When Selected

Clear Form When Selected

Conditions:

Match All  Match Any

Message Time Fence Days (QBE)

Leadtime Level (QBE)

Branch/Plant (QBE)   ▼

Stocking Type (QBE)   ▼

+ 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:** \* 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 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 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. I hope future releases provide field level comparison features under watchlists.

## ***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.

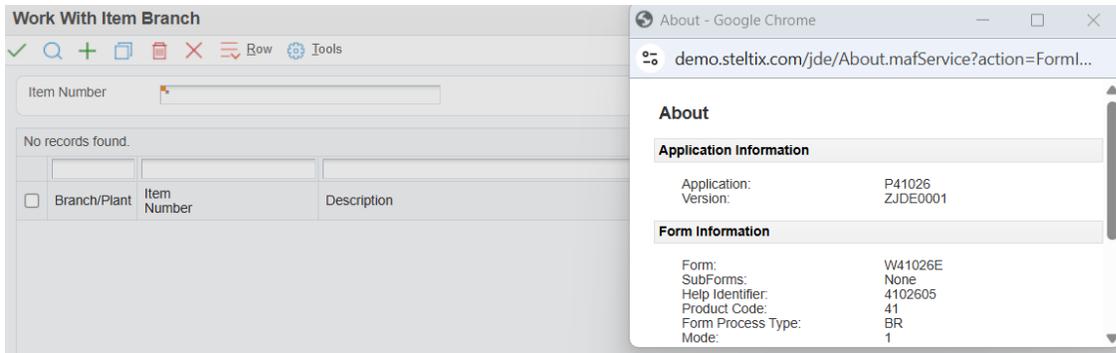
Technology used: Item Branch application

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 a 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)

Item Number:

Records 1 - 2

	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.

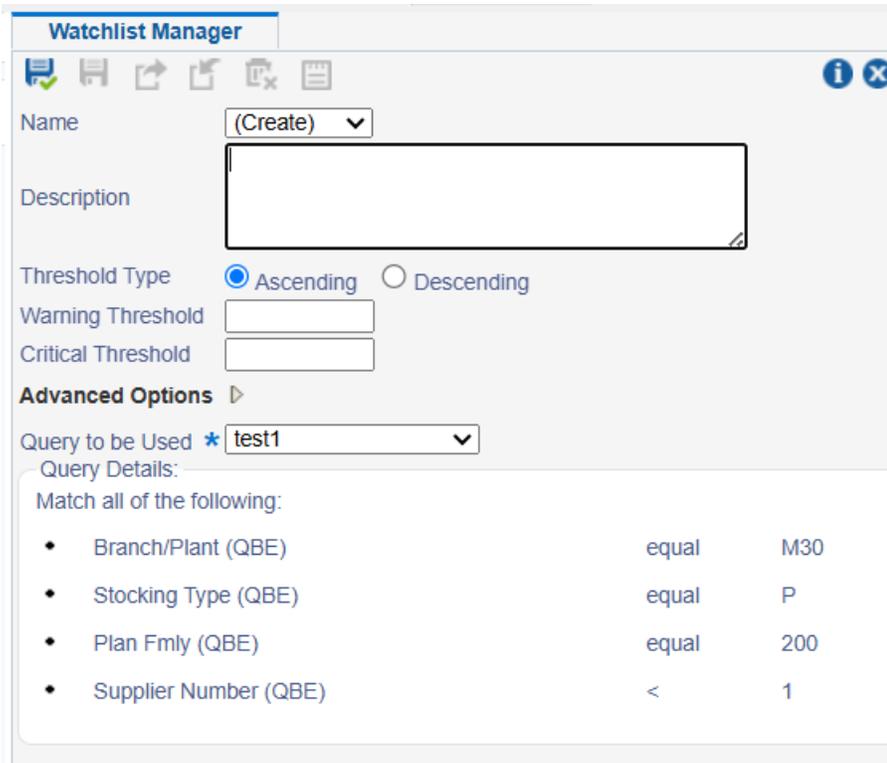
Branch plant, stocking type, planning family (200 in this example), supplier number <1 (as example). Save the query with a unique understandable name

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



## 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 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

## ***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 possibly be stopped with the change in processing option.

Workorders are getting completed and go to 95 (typically). Manufacturing accounting runs 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 bookkeeping purposes. You don't want to book the next months or many months after regular transactions have happened.

Technology used: UDO watchlist.

Limitations: Ensure you have security access to running 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 the 'Query Manager' dialog box open. 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	Item Number
M30						
M30 2001	A1		20.0000	1,000.0000	61,157.6300	2001
M30 2001	B1		995.0000	3,662.0000	4,564.4000	2001
M30 2001	C3		995.0000	3,662.0000	918.8800	2001
M30 2001	C4		995.0000	3,662.0000	918.8800	2001

The 'Query Manager' dialog box is open on the right, showing the following configuration:

**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) [ ]
- Actual Units (QBE) [ ]
- Actual Variance (QBE) > 10.0000

Additional Fields Selection:

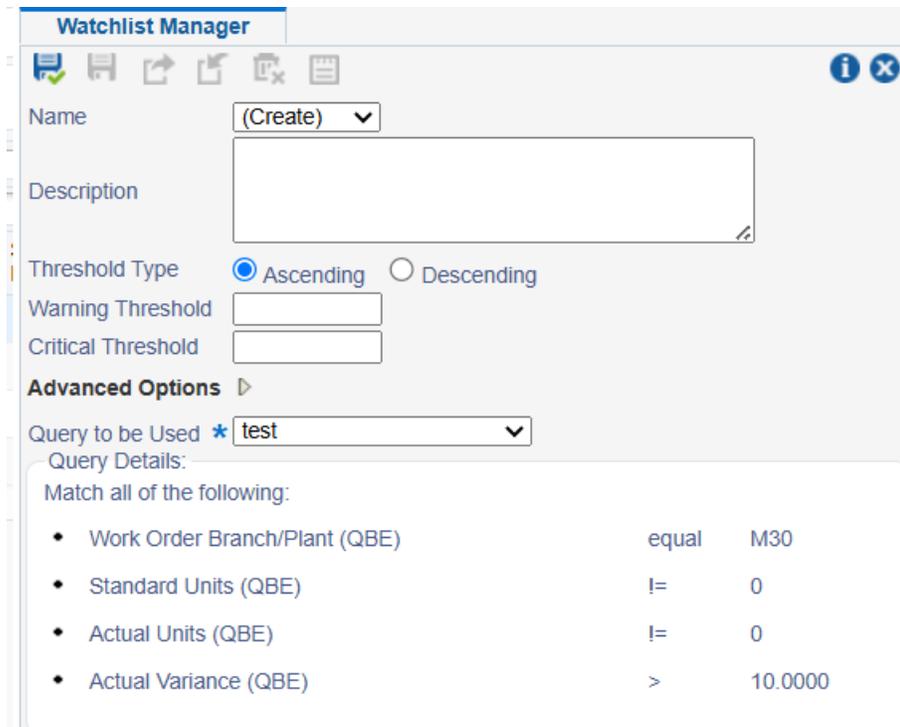
## Bigger view of the query manager

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
  - 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



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.

## ***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 possibly be stopped with the change in processing option.

Workorders are getting completed and go to 95 (typically). Manufacturing accounting runs 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 bookkeeping purposes. You don't want to book the next months or many months after regular transactions have happened.

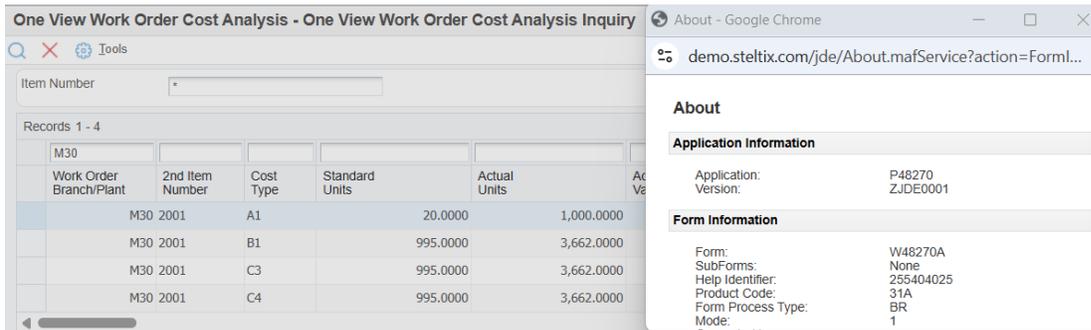
Technology used: UDO watchlist.

Limitations: Ensure you have security access to running this application

Table/Application Used: P48270

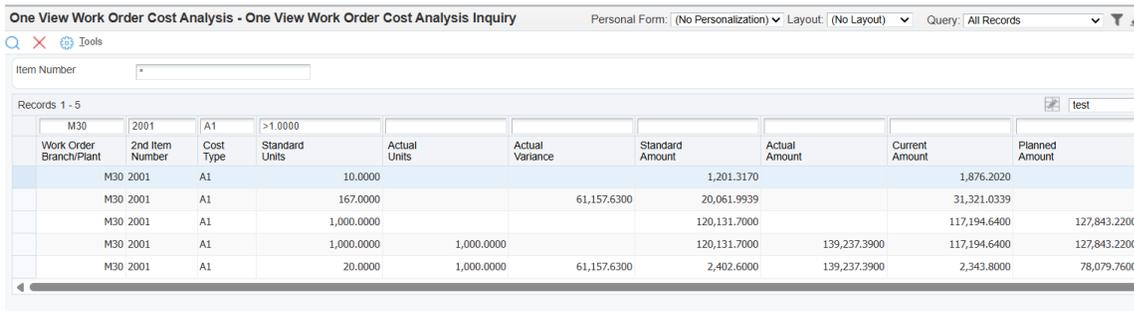
Step 1

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
✕ 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.

## ***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 possibly be stopped with the change in processing option.

Workorders are getting completed and go to 95 (typically). Manufacturing accounting runs 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 bookkeeping purposes. You don't want to book the next months or many months after regular transactions have happened.

Technology used: UDO watchlist.

Limitations: Ensure you have security access to running 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	Ac V
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: 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 populated QBE and a new query. 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	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

The application interface includes a search bar for 'Item Number', a 'Records 1 - 5' indicator, and a 'test' button. The top right corner shows 'Personal Form: (No Personalization)', 'Layout: (No Layout)', and 'Query: All Records'.

## Bigger view of the query manager

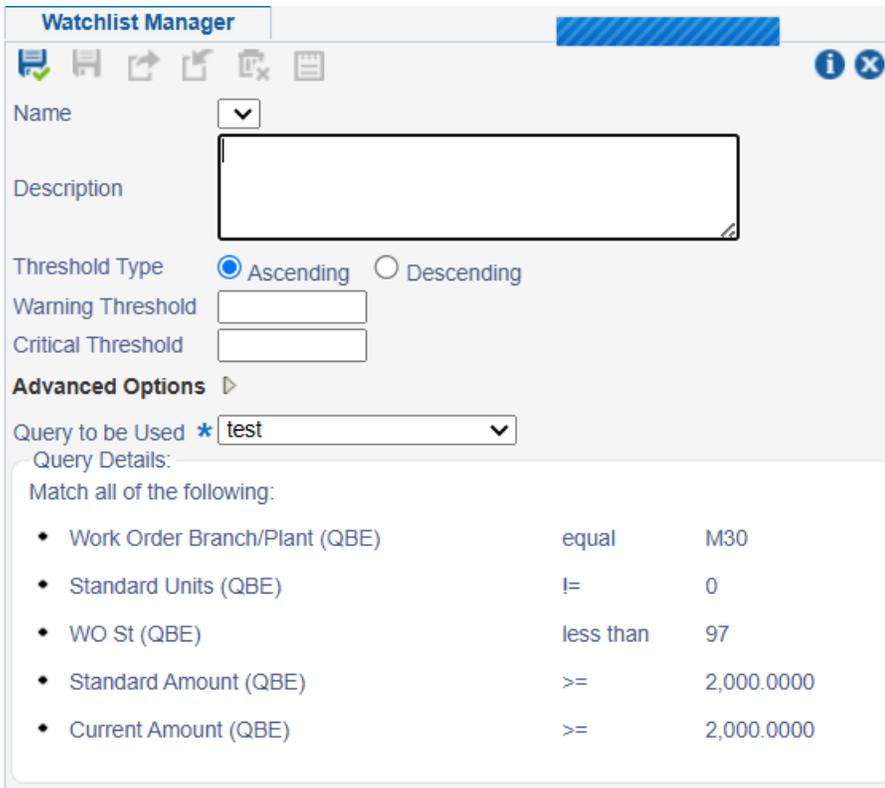
The screenshot shows the 'Query Manager' window. At the top, there is a toolbar with icons for save, refresh, search, and other actions. Below the toolbar, the 'Name' field is set to 'test'. There are three checkboxes: 'Set As Default' (unchecked), 'Run When Selected' (checked), and 'Clear Form When Selected' (unchecked). The 'Conditions' section is expanded, showing a list of criteria. The 'Match All' radio button is selected. The conditions are:

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
Cost Type (QBE)	equal	A1

At the bottom of the conditions section, there is a '+ Additional Fields Selection' button.

## Step 3

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



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

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

Standard units, planning units, planned variance at different levels

Similar concept for \$ values

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

## ***Work Order Operations Delayed Alert***

### Business Requirement:

On long lead time manufacturing environment, work orders get delayed at one or more work centers. 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.

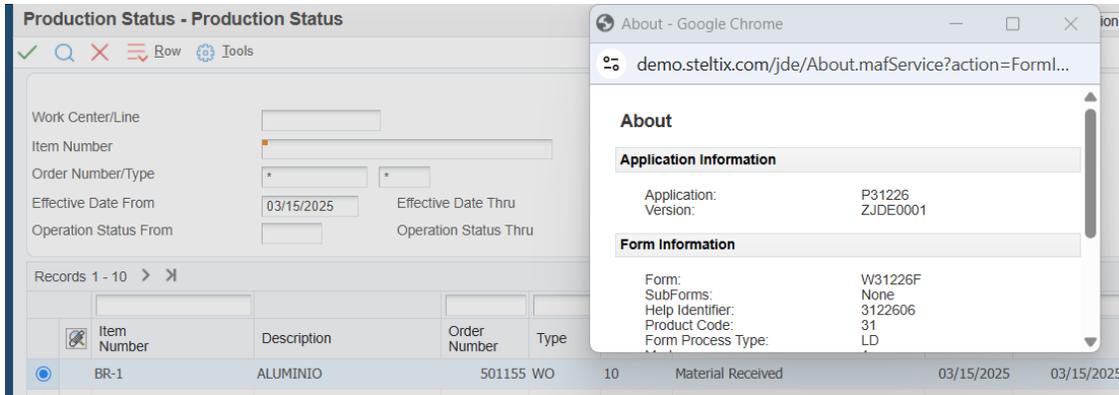
Technology used: Watch list

Limitations: None. Please check security granted to right roles

Table/Application Used: P31226

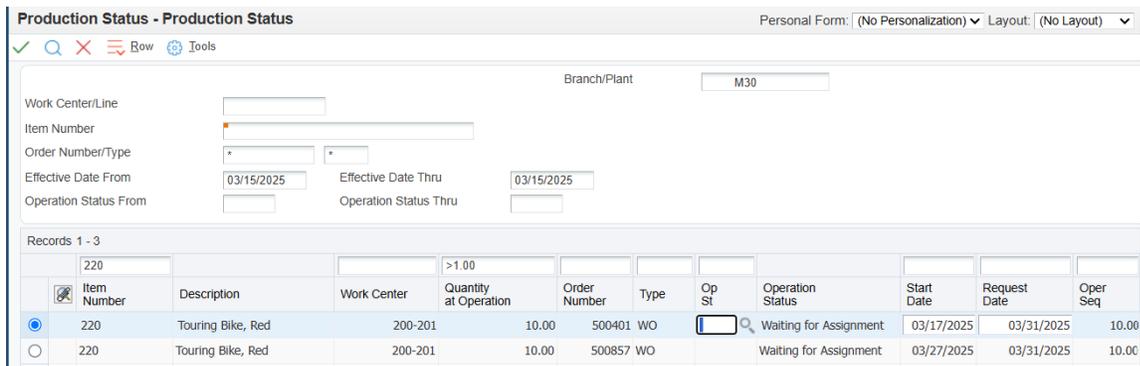
### Step 1

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 a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



## Step 2

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



## Step 3

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

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

**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 all records option if you feel the watchlist extract is incorrect.

## ***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 possibly be stopped with the change in processing option.

Workorders are getting completed and go to 95 (typically). Manufacturing accounting runs 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 bookkeeping purposes. You don't want to book the next months or many months after regular transactions have happened.

Technology used: UDO watchlist.

Limitations: Ensure you have security access to running 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	Ac V
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

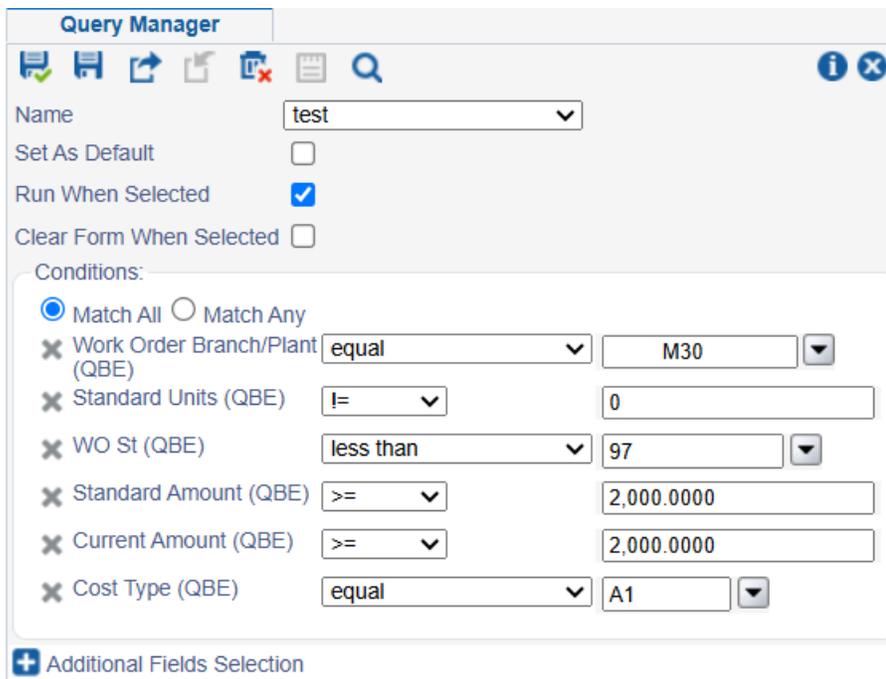
Populate some QBE values and create a new query

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	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

The application interface includes a search bar for 'Item Number', a 'Records 1 - 5' indicator, and a 'test' button. The top right corner shows 'Personal Form: (No Personalization)', 'Layout: (No Layout)', and 'Query: All Records'.

## Bigger view of the query manager



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

- 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

**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

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.

## ***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 keep the work order from processing, you can either use hold code (or) use a special status like 82 (example). Or sometimes planners use status like 08 to keep the workorder from NOT getting picked up further into the next steps.

Another example, as a 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 a variety of reasons and you create each one for the age analysis, like <30 days, ><60 days, ><90days

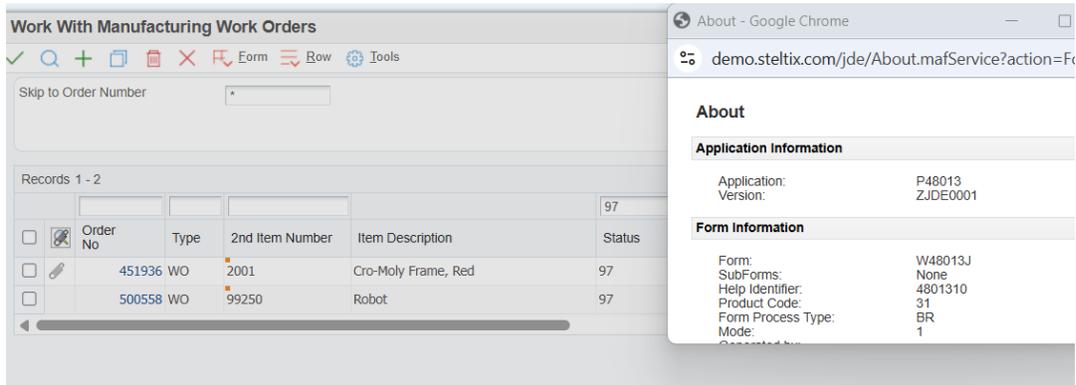
Technology used: UDO watchlist.

Limitations: Ensure you have security access to running this application

Table/Application Used: P48013

## Step 1

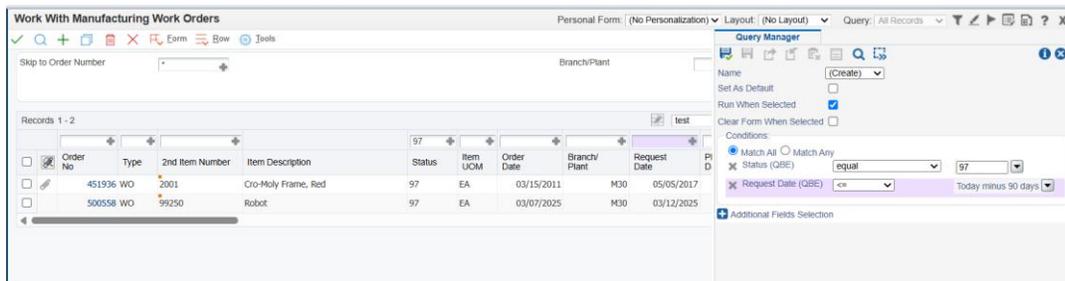
Open Workorder entry application



## Step 2

Query some QBE values. Create a new inquiry

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



Right pane repeated for clarity view

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

- Name: (Create) [dropdown]
- Set As Default:
- Run When Selected:
- Clear Form When Selected:
- Conditions:
  - Match All (selected) / Match Any
  - Status (QBE): equal [dropdown] 97 [input]
  - Request Date (QBE): <= [dropdown] Today minus 90 days [dropdown]
- Additional Fields Selection: [empty area]

### 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:**
  - 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 be 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.

## ***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 poses surprises for Planners using MRP and Buyers who thought everything was 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.

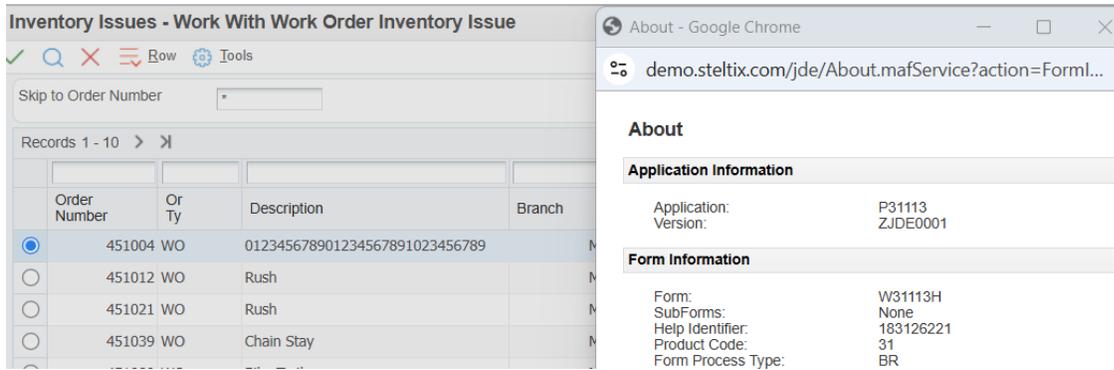
Technology used: Watch list

Limitations: None. Please check security granted to right roles

Table/Application Used: P31113

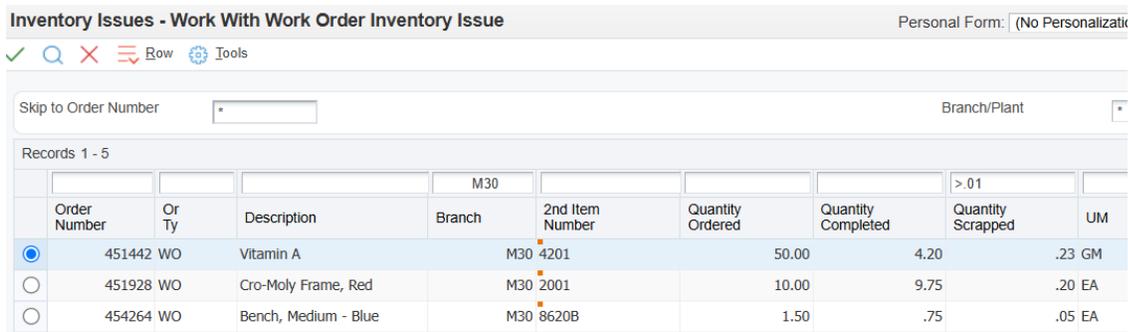
Step 1

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 a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



## Step 2

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



## Step 3

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

You can focus on 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.

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

- Name: (Create) [v]
- Set As Default:
- Run When Selected:
- Clear Form When Selected:
- Conditions:
  - Match All  Match Any
  - Branch (QBE): equal [v] M30 [v]
  - Quantity Scrapped (QBE): > [v] .01 [v]
  - Request Date (QBE): = [v] [v]
  - 2nd Item Number (QBE): equal [v] [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 all records option if you feel the watchlist extract is incorrect.

## ***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 possibly be stopped with the change in processing option.

Work orders are getting completed and go to 95 (typically). Manufacturing accounting runs 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 bookkeeping purposes. You don't want to book the next months or many months after regular transactions have happened.

Technology used: UDO watchlist.

Limitations: Ensure you have security access to running 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				
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' sidebar on the right contains 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

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

## Bigger view of the query manager

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

- 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 B1, B3
- 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	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.

## ***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 possibly be stopped with the change in processing option.

Workorders are getting completed and go to 95 (typically). Manufacturing accounting runs 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 bookkeeping purposes. You don't want to book the next months or many months after regular transactions have happened.

Technology used: UDO watchlist.

Limitations: Ensure you have security access to running 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				
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 side of the screen, 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	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

The application interface includes a search bar for 'Item Number', a 'Records 1 - 5' indicator, and a 'test' button. The top right corner shows 'Personal Form: (No Personalization)', 'Layout: (No Layout)', and 'Query: All Records'.

## Bigger view of the query manager

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
  - 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.

## CAFE1 Purchasing Composite

Business Requirement:

CAFE1 is a powerful JDE UDO tool to build composite applications talking to each other's applications. Useful in quick data review as in item branch master data review to complex decision-making processes 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 trying 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 and 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 > X 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 Dz
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: \* 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 Inc

Maximize Main Grid:

EnterpriseOne Link Owner: DEMO

What type of link:

Static Link **i**

Dynamic Link **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)

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.

UX One Purchase Order Detail Inquiry - Purchase Order Detail Inquiry

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

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	Origin Promise 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	

Work With Supply and Demand

Selection

Available to Promise

Records 1 - 9

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

UX One Purchase Order Detail Inquiry - Purchase Order Detail Inquiry

Personal Form: (No Personalization)

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	Origin Promise 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 shows the SAP 'Work With Supply and Demand' interface. At the top, there is a title bar with 'Work With Supply and Demand - Demand and Supply Inquiry - Plant Maint' and a sub-header 'Work With Supply and Demand'. Below the header, there are navigation icons (checkmark, search, refresh) and two expandable sections: 'Selection' and 'Available to Promise'. The main area displays a table of records, with the first record selected. The table has columns for Promise Date, Demand, Supply, Quantity Available, Order No, and Type. The data shows a total supply of 1778.00 and a total quantity available of 1778.00. The first record is for 03/13/2025 with a supply of 1778.00. Other records include dates from 03/05/2025 to 03/11/2025 with various supply and quantity values, and order numbers ranging from 408 to 433, all of type 'OP'.

	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 applications talking to each other's 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 and 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

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	>1.0000	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) ▾

Version: Work Order version(ZJDE0001) ▾

Personal Form: Default ▾

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 ⓘ

Dynamic Link ⓘ

Static Value: Your text ⓘ Separator: ,

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

When do you want to see the content frame:

Always ⓘ

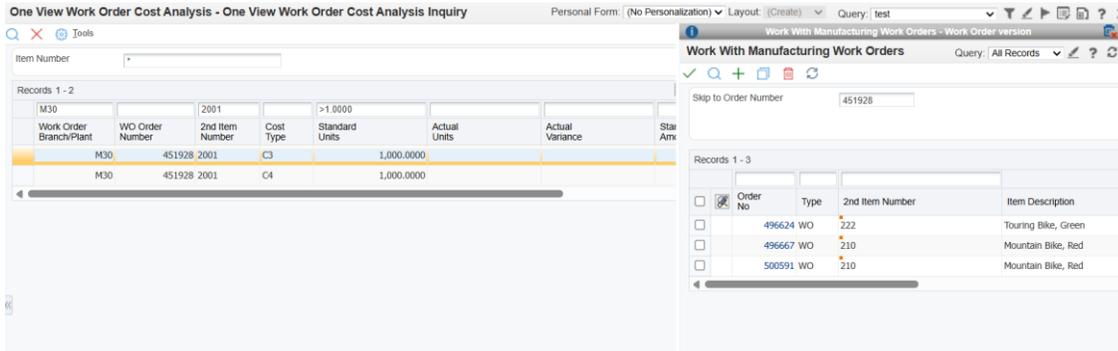
Sometimes ⓘ

### Step 3

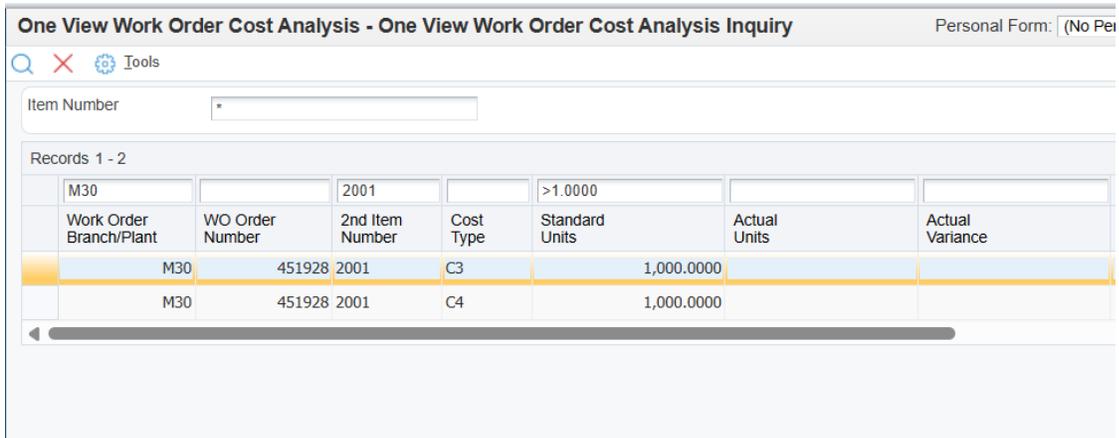
Completed view of first right pane looks like below.

Save the composite with a unique yet clearly understandable name.

Ask IT for deployment and promotion to PD.



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"/>	<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 applications talking to each other's applications. Useful in quick data review as in item branch master data review to complex decision-making processes 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. Users 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 and 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	<input type="text" value="remains as"/>	
Document Type	<input type="text" value="remains as"/>	
Document (Voucher, Invoice, etc.)	<input type="text" value="remains as"/>	
Effective - Thru Date	<input type="text" value="remains as"/>	
J.D. EnterpriseOne Event Point 01	<input type="text" value="remains as"/>	
J.D. EnterpriseOne Event Point 01	<input type="text" value="remains as"/>	
J.D. EnterpriseOne Event Point 01	<input type="text" value="remains as"/>	
Item Number - Short	<input type="text" value="is mapped to"/>	<input type="text" value="ITM(Short Item No)"/> <i>?</i>
Business Unit	<input type="text" value="is mapped to"/>	<input type="text" value="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: \* 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:  Separator:

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 ▾	

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 Item Branch' interface. The main table shows two records for branch M30:

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

The right-hand panes are:

- Additional System Info:** Shows Branch/Plant M30 and Item Number 2002. It includes tabs for Plant Manufacturing, Grade and Potency, and Service/Warranty. Fields include Order Policy Code (1), Planning Code (3), Planning Fence Rule (C), Planning Fence (15), Freeze Fence (10), Message Display Fence (299), Setup Labor, Move / Queue Hours, and a checkbox for Suppress MRP Messages. ECO Number, Reason, and Date fields are also present.
- Quantities - Branch/Plant Item Information:** Contains input fields for Reorder Quantity, Maximum Reorder Qty (.00), Minimum Reorder Qty, Reorder Point (.15), Multiple Order Quantity, Units Per Container (1), and Safety Stock (.02).

## **CAFE1 MRP Review Composite**

Business Requirement:

CAFE1 is a powerful JDE UDO tool to build composite applications talking to each other's applications. Useful in quick data review as in item branch master data review to complex decision-making processes 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 trying MRP message review application with S&D inquiry & item availability. If a user wants 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 and get sample data. Reformat the grid and/or complete grid extension sessions.

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

✓ 🔍 + ✖ 🔄 Form ⌵ Row 🖨 View ⚙ Tools

Item Number  Branch/Plant   
Planner Number   
Master Planning Family  Buyer Number   
Project Number  Planning Code

Records 1 - 7

	M30	B											
<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. Last Status	Start Date
<input type="checkbox"/>		M30 3000	B	Order & Ex...		10.00	EA		WO	01/03/2017	10		12/31/2016
<input type="checkbox"/>		M30 5006	B	Order & Ex...		9.50	EA		OP	01/17/2017		220	12/31/2016
<input type="checkbox"/>		M30 9001	B	Order & Ex...	Y	232.89	CM		OP	06/14/2017		220	05/27/2017
<input type="checkbox"/>		M30 9002	B	Order & Ex...		167.40	CM		OP	06/14/2017		220	05/27/2017
<input type="checkbox"/>		M30 9004	B	Order & Ex...		15.63	CM		OP	06/14/2017		220	05/27/2017
<input type="checkbox"/>		M30 9102	B	Order & Ex...		514.29	CM		OP	06/06/2017		220	05/27/2017
<input type="checkbox"/>		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 - Pl

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 ⓘ

Add additional applications.

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

Item Number:   
 Planner Number:   
 Master Planning Family:   
 Project Number:

Records 1 - 7

M30	Demand Branch	Item Number	Msg Typ	Message	Message Processed	Required Quantity	UM	Order Number	Or Ty	Request Date
<input type="checkbox"/>	M30 3000	B	Order & Ex...			10.00	EA	WO		01/03/2017
<input type="checkbox"/>	M30 5006	B	Order & Ex...			9.50	EA	OP		01/17/2017
<input type="checkbox"/>	M30 9001	B	Order & Ex...	Y		232.89	CM	OP		06/14/2017
<input type="checkbox"/>	M30 9002	B	Order & Ex...			167.40	CM	OP		06/14/2017
<input type="checkbox"/>	M30 9004	B	Order & Ex...			15.63	CM	OP		06/14/2017
<input type="checkbox"/>	M30 9102	B	Order & Ex...			514.29	CM	OP		06/06/2017
<input type="checkbox"/>	M30 9102	B	Order & Ex...			149.52	CM	OP		06/13/2017

**Work With Supply and Demand** Work With Supply and Demand - Demand and Supply Inquiry - Plant Maint

Selection

Available to Promise

Records 1 - 53

Promise Date	Demand	Supply	Quantity Available	Order No	Type	Branch Plant
<input checked="" type="radio"/> 03/13/2025						
<input type="radio"/> 01/03/2017		10.00			WO	
<input type="radio"/> 01/10/2017		10.00			WO	
<input type="radio"/> 01/17/2017		10.00			WO	
<input type="radio"/> 01/24/2017		10.00			WO	
<input type="radio"/> 01/31/2017		10.00			WO	
<input type="radio"/> 02/07/2017		10.00			WO	
<input type="radio"/> 02/14/2017		10.00			WO	
<input type="radio"/> 02/21/2017		10.00			WO	
<input type="radio"/> 02/28/2017		10.00			WO	
<input type="radio"/> 03/07/2017		10.00			WO	

**Edit EnterpriseOne Application Details**

Link Information:

Application: \*

Form: \*

Version:

Personal Form:

Name: \*

Description:

Automatically Find On Entry

What type of link:

Static Link  Dynamic Link

Static Value:  Separator:

Parameters	Operation	Parameter Value
Business Unit	is mapped to	MCU(Demand Branch)
Location	remains as	
Lot/Serial Number	remains as	
Item Number - Unknown Format Entered	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 Supply and Demand interface, divided into three main panes:

- Work With Detail Messages:** Shows a list of messages for item M30. The table includes columns for Demand Branch, Item Number, Message, Message Processed, Required Quantity, UOM, Order Number, Order Type, and Request Date.
- Work With Item Availability:** Shows item availability data for M30. The table includes columns for Location, Lot/Serial, Branch/Plant, On Hand, Committed, and Available.
- Work With Supply and Demand:** Shows a detailed view of supply and demand for M30. The table includes columns for Promise Date, Demand, Supply, Quantity Available, Order No, Type, and B/P.

Demand Branch	Item Number	Msg Typ	Message	Message Processed	Required Quantity	UOM	Order Number	Or Ty	Request Date
M30	3000	B	Order & Ex...		10.00	EA		WO	01/03/20
M30	5006	B	Order & Ex...		9.50	EA		OP	01/17/20
M30	9001	B	Order & Ex...	Y	232.89	CM		OP	06/14/20
M30	9002	B	Order & Ex...		167.40	CM		OP	06/14/20
M30	9004	B	Order & Ex...		15.63	CM		OP	06/14/20
M30	9102	B	Order & Ex...		514.29	CM		OP	06/06/20
M30	9102	B	Order & Ex...		149.52	CM		OP	06/13/20

Location	Lot/Serial	Branch/Plant	On Hand	Committed	Available
		M30			
<b>TOTAL:</b>		<b>M30</b>			
<b>GRAND TOTAL:</b>		<b>M30</b>			

Promise Date	Demand	Supply	Quantity Available	Order No	Type	B/P
03/13/2025						
01/03/2017		10.00			WO	
01/10/2017		10.00			WO	
01/17/2017		10.00			WO	
01/24/2017		10.00			WO	
01/31/2017		10.00			WO	
02/07/2017		10.00			WO	
02/14/2017		10.00			WO	
02/21/2017		10.00			WO	
02/28/2017		10.00			WO	
03/07/2017		10.00			WO	
03/14/2017		10.00			WO	
03/21/2017		10.00			WO	
03/28/2017		10.00			WO	
04/04/2017		10.00			WO	
04/11/2017		10.00			WO	
04/18/2017		10.00			WO	
04/25/2017		10.00			WO	

## CAFE1 Sales Orders Composite

### Business Requirement:

CAFE1 is a powerful JDE UDO tool to build composite applications talking to each other's applications. Useful in quick data review as in item branch master data review to complex decision-making processes 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 wants 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 and get sample data. Reformat the grid and/or complete grid extension sessions.

The screenshot shows the 'One View Open Sales Inquiry' application interface. On the left, there are search filters for Order Company, Branch Plant, and Item Number. Below these is a table with columns: Order Number, Order Type, Line Type, Line Number, Sold To Number, Short Item Number, and Sold To Name. The table contains several rows of data. On the right, an 'About' dialog box is open, displaying 'Application Information' (Application: P42270, Version: ZJDE0001) and 'Form Information' (Form: W42270A, SubForms: None, Help Identifier: 245326330, Product Code: 42B, Form Process Type: BR).

The screenshot shows the 'One View Open Sales Inquiry' application interface with a detailed data grid. The grid has columns for Order Number, Order Type, Line Type, Line Number, Sold To Number, Short Item Number, Sold To Name, Branch Plant, Item Number, Item Description, Quantity Ordered, Last Status, Next Status, and Request Date. The data is as follows:

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

## Step 2

Start CAFE1 process of adding another application to the right pane

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

### Create Link to EnterpriseOne Application

Link Information:

Application: \* P4021

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

Version: Supply & Demand Inquiry with ATP Lines for Dail(ZJDE0001E ▾

Personal Form: Default ▾

Name: \* P4021|W4021B|ZJDE0001D

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

Maximize Main Grid:

What type of link:

Static Link ⓘ

Dynamic Link ⓘ

Static Value: Your text ⓘ Separator: ,

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

When do you want to see the content frame:

Always ⓘ

Sometimes ⓘ

**Create Link to EnterpriseOne Application**

Link Information:

Application: \*

Form: \*

Version:

Personal Form:

Name: \*

Description:

**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.

The screenshot displays the SAP One View Open Sales Inquiry interface. The main window shows a list of sales orders (SO) with columns for Order Number, Order Type, Line Type, Line Number, Sold To Number, Short Item Number, Sold To Name, Branch Plant, Item Number, and Item Description. The right-hand pane is titled 'Work With Supply and Demand' and contains a table with columns for Promise Date, Demand, Supply, Quantity Available, Order No, and Type. Below this, there is a 'Work With Item Availability' pane showing a table with columns for Location, Lot/Serial, Branch Plant, On Hand, Committed, Available, and On Receipt.

Order Number	Order Type	Line Type	Line Number	Sold To Number	Short Item Number	Sold To Name	Branch Plant	Item Number	Item Description
1215	SO	S	1.000	4242	60257	Capital System	M30 2020	Stem	
1216	SO	S	1.000	4242	60046	Capital System	M30 221	Touring Bike, ...	
1216	SO	S	2.000	4242	60038	Capital System	M30 220	Touring Bike, ...	
1216	SO	S	3.000	4242	60249	Capital System	M30 2019	Seat Post, BB	
1216	SO	S	3.001	4242	60249	Capital System	M30 2019	Seat Post, BB	
1219	SO	S	1.000	4242	60038	Capital System	M30 220	Touring Bike, ...	
1219	SO	S	1.001	4242	60038	Capital System	M30 220	Touring Bike, ...	
1239	SO	S	1.000	4242	60257	Capital System	M30 2020	Stem	
1241	SO	S	1.000	4242	60257	Capital System	M30 2020	Stem	

Promise Date	Demand	Supply	Quantity Available	Order No	Type
03/14/2025		1157.85	1157.85		
03/14/2025		420.15	1578.00		
03/14/2025		200.00	1778.00		

Location	Lot/Serial	Branch Plant	On Hand	Committed	Available	On Receipt
P		M30	1157.85	1087.85	70.00	3967
S	WH.001.	M30	420.15	120.15	300.00	
S	WH.001.	M30	200.00		200.00	
		<b>M30</b>	<b>1778.00</b>	<b>1208.00</b>	<b>570.00</b>	<b>3967</b>
		<b>GRAND TOTAL</b>	<b>1778.00</b>	<b>1208.00</b>	<b>570.00</b>	<b>3967</b>

## CAFE1 Item UOM Composite

Business Requirement:

CAFE1 is a powerful JDE UDO tool to build composite applications talking to each other's applications. Useful in quick data review as in item branch master data review to complex decision-making processes 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 and get sample data. Reformat the grid and/or complete grid extension sessions.

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

✓ 🔍 + 📄 ✖ 📄 Row ⚙️ Tools

Item Number

Records 1 - 10 > ⌂

<input type="checkbox"/>	Branch/Pla	Item Number	Description	Stocking Type	Buyer Number	Planner Number	Supplier Number	Pla 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

The screenshot shows a dialog box titled "Create Link to EnterpriseOne Application". It contains the following fields and options:

- Link Information:**
  - Application: \* P4101
  - Form: \* Item Master Revisions(W4101A)
  - Version: Item Master Revision(XJDEB0001)
  - Personal Form: Default
  - Name: \* P4101|W4101A|XJDEB0001
  - Description: Item Master Revisions - Item Master Revision
- What type of link:**
  - Static Link
  - Dynamic Link
- Static Value:** Your text
- Separator:** ,
- Parameters Table:**

Parameters	Operation	Parameter Value
Item Number - Short	is mapped to	ITM(Short Item No)
Status	remains as	
Document	remains as	
- When do you want to see the content frame:**
  - Always
  - Sometimes

The screenshot shows the "Work With Item Branch" application. The main table displays item data, and the right-hand pane shows the "Item Master Revisions" form.

Branch/Plant	Item Number	Description	Stocking Type	Buyer Number	Planner Number	Supplier Number	Pla Fin
M30			P			4343 200	
<input 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-Holy 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	

The right-hand pane shows the "Item Master Revisions" form with the "Item Number" field set to 2014. Below the form, there are tabs for "Basic Item Data", "Additional Info", "Weights and Measures", and "Lot Processing". The "Weights and Measures" tab is active, showing a table of unit of measures:

Unit Of Measures	Value
Primary	EA Each
Secondary	EA Each
Purchasing	EA Each
Pricing	EA Each
Shipping	BX Box
Production	EA Each
Component	EA Each
Weight	OZ Ounces
Volume	FC Cubic Feet

Create Link to EnterpriseOne Application

Link Information:

Application: \* P41002

Form: \* Item Unit Of Measure Conversions(W41002D)

Version: ▾

Personal Form: Default ▾

Name: \* P41002|W41002D

Description: Item Unit Of Measure Conversions

Maximize Main Grid:

Create Link to EnterpriseOne Application

Static Link  Dynamic Link

Static Value: Your text  Separator: ,

Always  Sometimes

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) ?

Create Link to EnterpriseOne Application

Link Information:

Application: \* P41003

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

Version: ▾

Personal Form: Default ▾

Name: \* P41003|W41003B

Description: Standard Units of Measure Revisions

**Create Link to EnterpriseOne Application**

Description:

What type of link:

Static Link **i**

Dynamic Link **i**

Static Value:  Separator:

When do you want to see the content frame:

Always **i**

Sometimes **i**

Parameters	Operation	Parameter Value
Unit of Measure	is mapped to ▾	UOM1(Unit of Measure - Primary) <b>?</b>
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.

The screenshot displays the SAP EnterpriseOne interface with three main panes:

- Item Master Revisions:** Shows a list of revisions for item M30. The selected revision is M30 2011, 'Chain, Std', with a primary unit of measure of EA and a plan of 4343 200.
- Item Unit of Measure Conversions:** Shows a conversion record for item M30 2011, where 1 BX (Bicycle) is equal to 10.00000000 EA (Each).
- Work With Standard Units of Measure:** Shows the 'Weights and Measures' tab for item M30 2011, listing various units and their conversion factors.

Branch/Plant	Item Number	Description	Unit of Measure - Primary	Stocking Type	Buyer Number	Planner Number	Supplier Number	Plan Fnty
	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	

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

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

## CAFE1 Onhand vs Safety stock

Business Requirement:

You are troubleshooting MRP messages on why certain products/components are coming up with more buy messages. Or some users ask you for information on current inventory compared to the safety stock value assigned. Instead of running some custom reports (or) asking 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 a cost inquiry application to know current on-hand, which could be at different location, hence users need to total up all the locations manually. **Another quick solution is to replace OneView cost inquiry P41271 with lot availability application P41280**

Table/Application Used: P41271 OR P41280, P41026

## Step 1

Open UX one cost inquiry application

P41280

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 on the right, 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 N. The table contains several rows of data for branch M30. An 'About' dialog box is open on the right, displaying application and form information.

Branch Plant	2nd Item Number	Description	Location	Lot Serial N
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		
M30	220	Touring Bike, Red	1 A 2	

**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 displays the SAP One View Inventory Valuation Analysis Inquiry interface. The main window shows a table of records with columns for Branch Plant, Branch Plant Description, Item Number, Description, and Description Line 2. The records are 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

On the right side, the 'Create Link to EnterpriseOne Application' dialog box is open, showing the following configuration:

- 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

Below the link information, the 'What type of link' section is set to 'Dynamic Link'. The 'When do you want to see the content frame' section is set to 'Always'. The 'Parameters' table is as follows:

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

One View Inventory Valuation Analysis Inquiry - One View Inventory Valuation Analysis Inquiry Personal Form: (N)

Item Number  Branch/Plant

Records 1 - 10 > <

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) v

Version: Branch/Plant Item Information(ZJDE0001) v

Personal Form: Default v

Name: \* P41026|W41026C|ZJDE0001

Description: Quantities - Branch/Plant Item Information

What type of link:

- Static Link i
- Dynamic Link i

Static Value: Your text + Separator: ,

When do you want to see the content frame:

- Always i
- Sometimes i

Parameters	Operation	Parameter Value
Business Unit	is mapped to v	MCU(Branch Plant) ?
Item Number - Short	is mapped to v	ITM(Short Item No) ?
Status	remains as v	
Document Type	remains as v	
Document (Voucher, Invoice, etc.)	remains as v	
Effective - Thru Date	remains as v	
J.D. EnterpriseOne Event Point	remains as v	

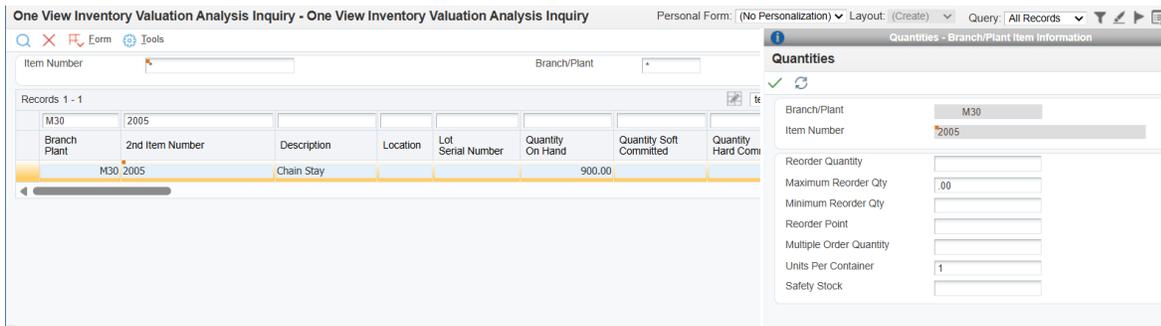
### Step 3

Final Cafe 1 layout composite view

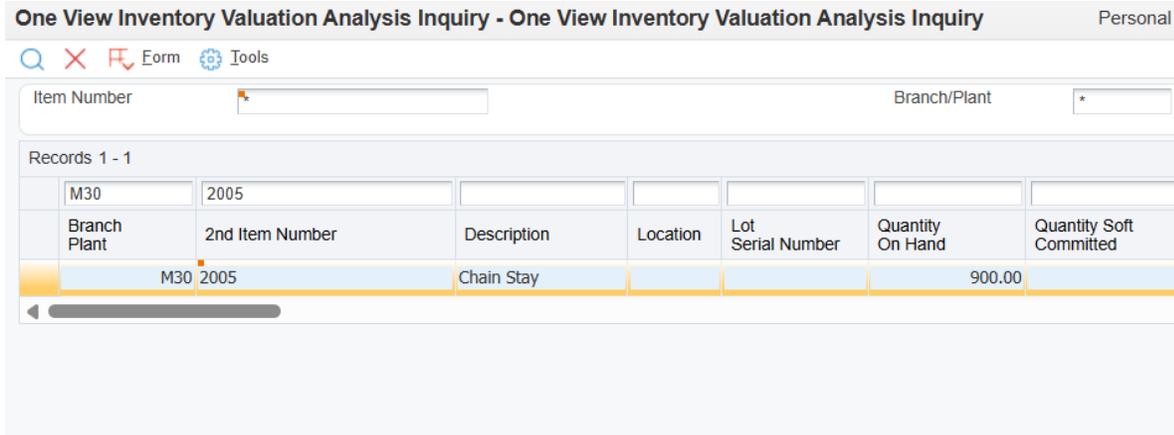
Location field is visible in this application. Filter out data and select the row, CAFE1 will bring the safety stock/quantities view on your right pane.

Save the composite with a unique yet clearly understandable name.

Ask IT for deployment and promotion to PD.



Left side piece for clarity



Right side piece for clarity

**Quantities - Branch/Plant Item Information**

**Quantities** ? ↻

✓ ↻

Branch/Plant	M30
Item Number	2005 Chain Stay
Reorder Quantity	<input type="text"/>
Maximum Reorder Qty	<input type="text" value=".00"/>
Minimum Reorder Qty	<input type="text"/>
Reorder Point	<input type="text"/>
Multiple Order Quantity	<input type="text"/>
Units Per Container	<input type="text" value="1"/>
Safety Stock	<input type="text"/>

## **Grid Extension: Item Branch**

Business Requirement:

Many users across the organization have access to an 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!

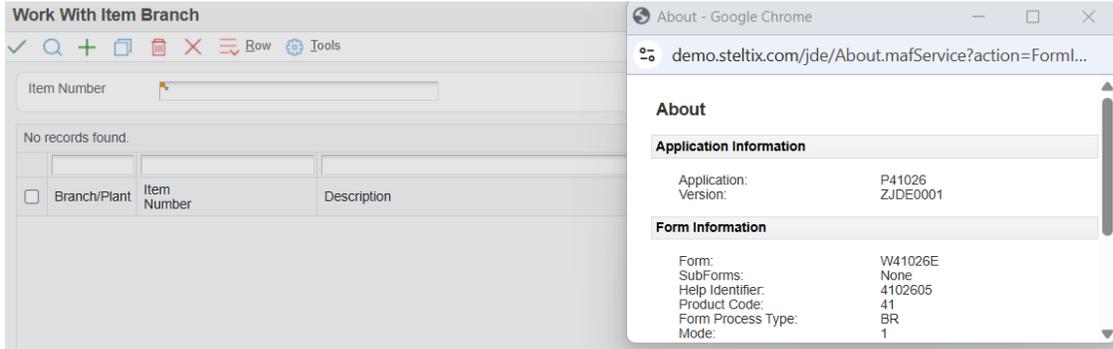
Technology used: Item Branch application

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 a 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.

The screenshot shows the 'Work With Item Branch' application interface with a populated grid. The grid displays 5 records, with columns for 'Branch/Plant', 'Item Number', 'Description', 'Stocking Type', 'Buyer Number', 'Planner Number', 'Supplier Number', 'Plan Fmly', and 'Line Type'. The records are as follows:

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		1	1		15 C	3	60	5
60185		I	1	1			2		5
60071		I	1	1			2		15
60134		I	1	1			2		5
60142	10 U		1	1		15 C	3	60	5

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 to bring all category codes into the main grid. And bringing all the quantities fields is another example. This will save user time by going into each row exit multiple times. They can achieve similar purposes by using a data browser but that needs separate security discussions.

This type of grid extension is 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 customer profiles & configurations. It takes time and effort to query data from regular JDE applications. You have identified the customer, go to the row exit & then go to different tabs.

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

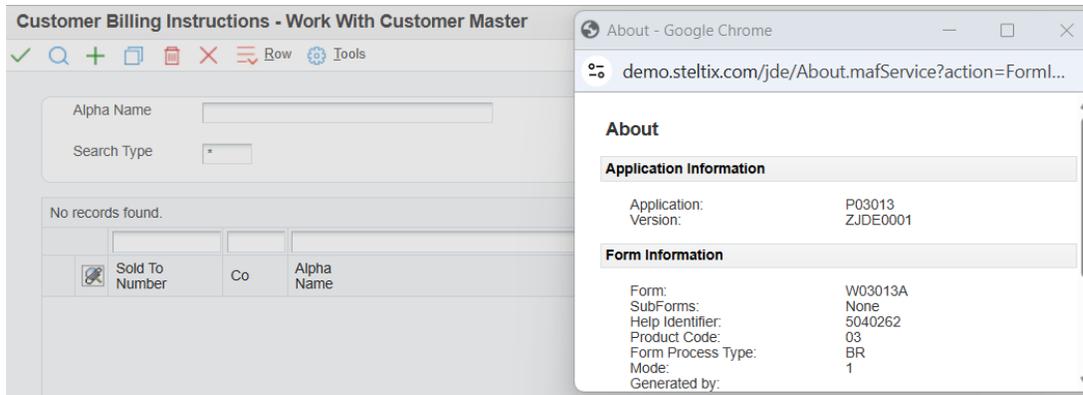
Technology used: Customer Master application

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 exist, ask IT to deploy to your security role. You will be testing this in a 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

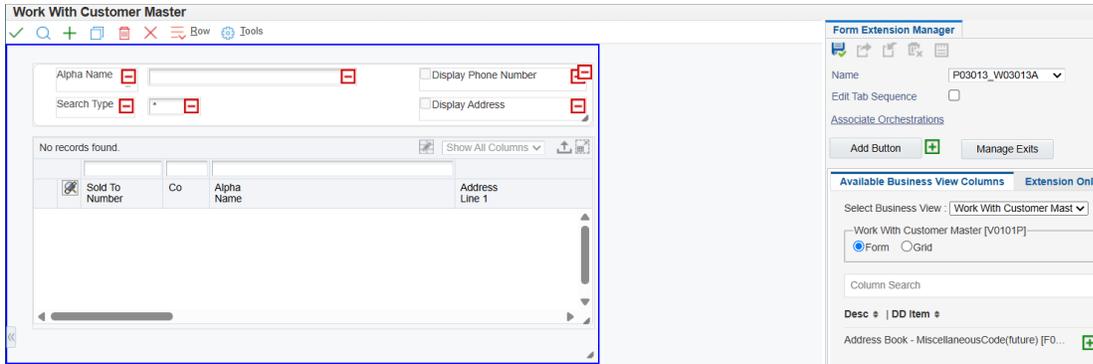
The screenshot shows the same web application interface as in Step 1, but with a table of records displayed. The search form has "Alpha Name" and "Search Type" fields. The table has columns: Sold To Number, Co, Alpha Name, C M, Long Address, Industry Class, Sch Typ, and Tax ID. The first record is selected.

Sold To Number	Co	Alpha Name	C M	Long Address	Industry Class	Sch Typ	Tax ID
3004 00000	00000	Pacific Company, The			7000	C	
3335 00000	00000	PeopleNet, Inc.				C	
3555 00000	00000	Pro Bike Shop			5200	C	
4202 00000	00000	Palisade Inc.			5000	C	

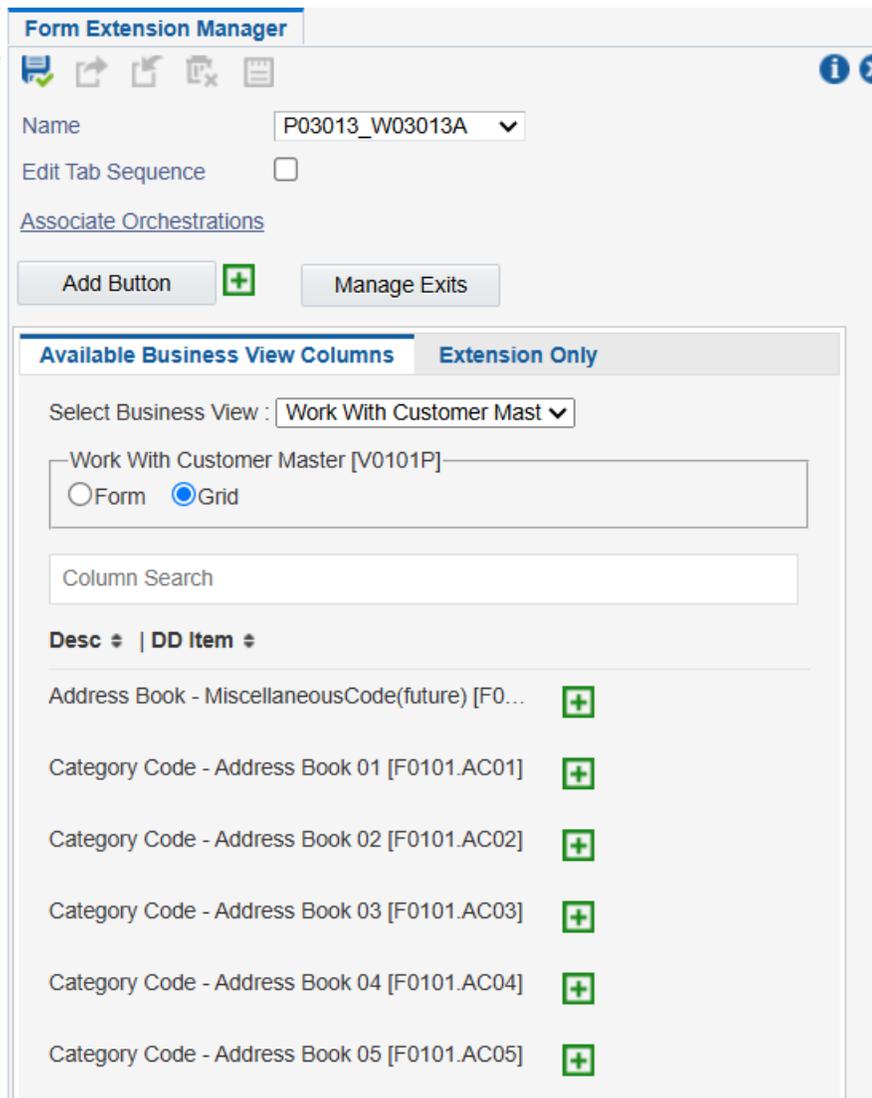
## Step 3

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

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



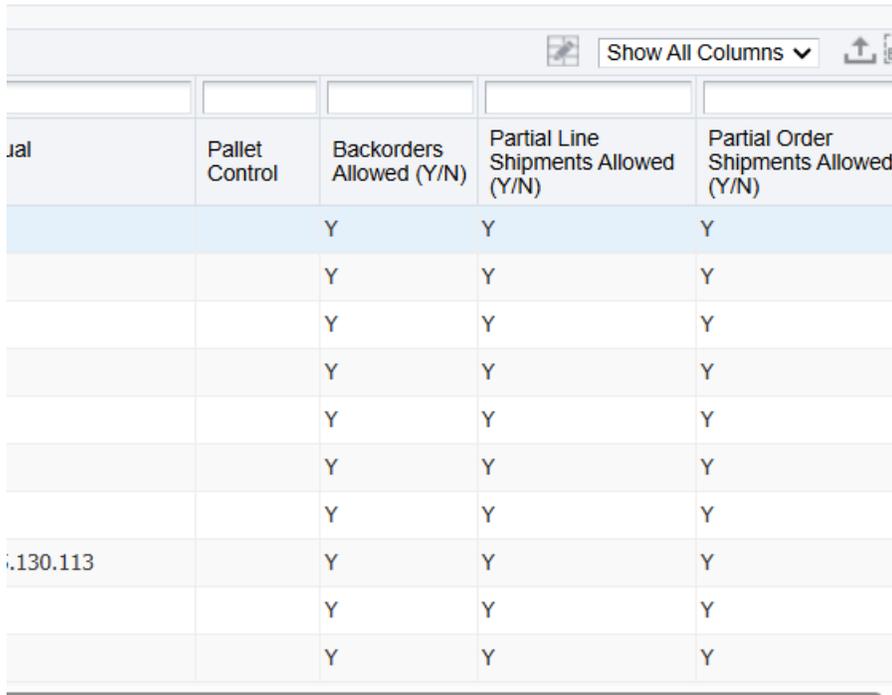
Click on the grid radio button on the app shown below. **Click on Desc sort icon to get all the fields in the naming order, it helps to find your fields quicker**



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)



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

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

#### Step 4

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

Save the composite with a unique yet clearly understandable name.

Ask IT for deployment and promotion to PD.

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

## **Personal Form Work Order Entry**

### **Business Requirement:**

Work orders get created from 1- auto sales order entry process, 2-configurator process, 3- MRP workorder message processing activity, etc. Work orders can also be entered into 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 transactions 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 a 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: (↑)

✓ 🔍 + 📄 🗑️ ✕ 🔄 Form 📄 Row ⚙️ Tools

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"/>		451004	WO	220	Touring Bike, Red	EA	05/08/2009	M30	03/08/2025	0
<input checked="" type="checkbox"/>		451012	WO	2001	Cro-Moly Frame, Red	EA	05/08/2009	M30	06/23/2017	0
<input type="checkbox"/>		451021	WO	2004	Cro-Moly Frame	EA	05/08/2009	M30	06/12/2017	0
<input type="checkbox"/>		451039	WO	2005	Chain Stay	EA	05/08/2009	M30	06/07/2017	0
<input type="checkbox"/>		451080	WO	2600	Bike Trailer	EA	11/20/2009	M30	06/10/2017	0
<input type="checkbox"/>		451098	WO	4001	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	Quantities
Requested	Order/UOM
Planned Effective	Secondary/UOM
Start	Shipped
Work Order	Canceled
Completed	

### 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** **Add Details 1** **Add Details 2** **Attachment**

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

## Work Order Details

✓ ✕ ⚙ Form ⚙ Tools

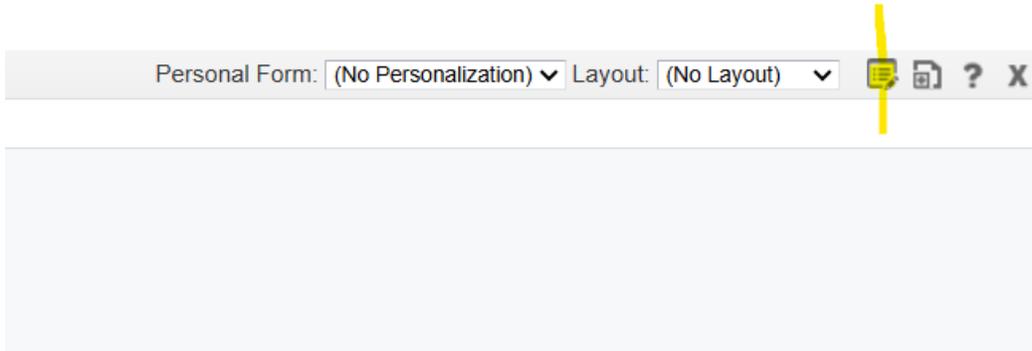
Order No/Type	451012	WO	Branch/Plant	M30
WO Desc	Rush			
Item Number	2001	Cro-Moly Frame, Red		

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

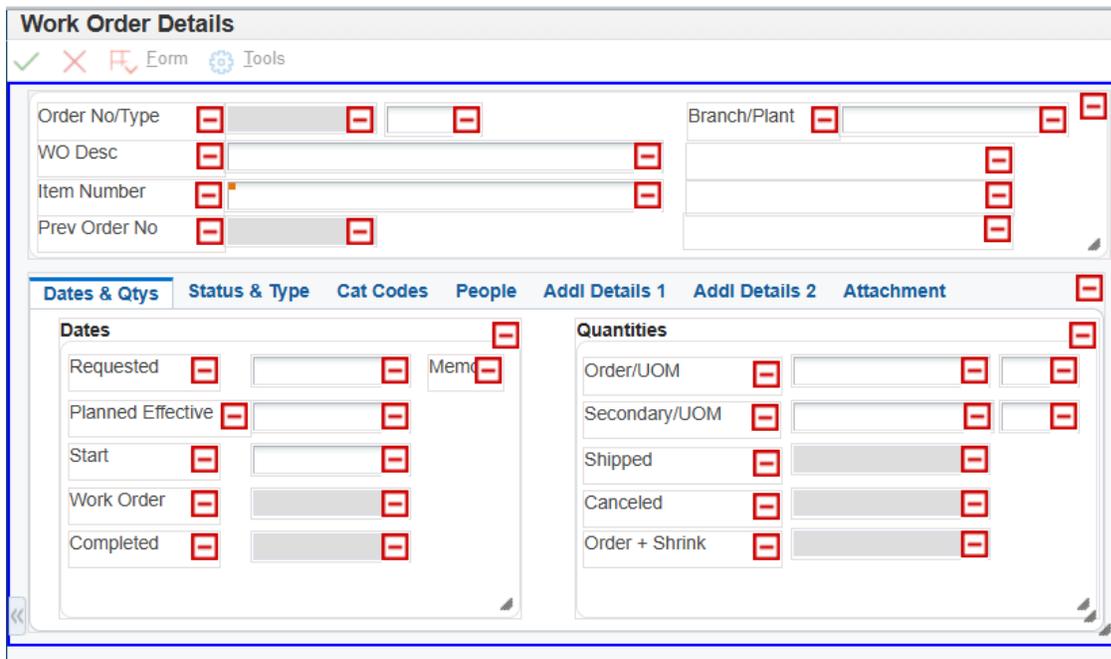
Phase	<input type="text"/>	Status	<input type="text"/>
Category 02	<input type="text"/>	Service Type	<input type="text"/>
Category 03	<input type="text"/>	Skill Type	<input type="text"/>
Category 04	<input type="text"/>	Experience Level	<input type="text"/>
Category 05	<input type="text"/>	Category 10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

## Step 2

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



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

A screenshot of a 'Work Order Details' form. The title bar reads 'Work Order Details' and includes icons for a checkmark, a red 'X', a red 'P' (Form), and a gear (Tools). The main area contains several input fields: 'Order No/Type', 'Branch/Plant', 'WO Desc', 'Item Number', and 'Prev Order No'. Below these are several tabs: 'Dates & Qtys', 'Status & Type', 'Cat Codes', 'People', 'Addl Details 1', 'Addl Details 2', and 'Attachment'. The 'Dates & Qtys' tab is active, showing two columns: 'Dates' and 'Quantities'. The 'Dates' column has fields for 'Requested', 'Planned Effective', 'Start', 'Work Order', and 'Completed'. The 'Quantities' column has fields for 'Order/UOM', 'Secondary/UOM', 'Shipped', 'Canceled', and 'Order + Shrink'. Each field has a small red square icon next to it.

You can override the tab name, if needed

**Work Order Details**

✓ ✕ ⚙ Form ⚙ Tools

Order No/Type	<input type="text"/>	Branch/Plant	<input type="text"/>
WO Desc	<input type="text"/>		<input type="text"/>
Item Number	<input type="text"/>		<input type="text"/>
Prev Order No	<input type="text"/>		<input type="text"/>

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

**JDE PERSONAL FORM**

Requested	<input type="text"/>	Memor	<input type="text"/>
Status	<input type="text"/>		
Phase	<input type="text"/>		
Planner	<input type="text"/>		
Order/UOM	<input type="text"/>		

You can click on a field to know the options. Hide is better than deleting 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	<input type="text"/>	Branch/Plant	<input type="text"/>
WO Desc	<input type="text"/>		<input type="text"/>
Item Number	<input type="text"/>		<input type="text"/>
Prev Order No	<input type="text"/>		<input type="text"/>

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

**JDE PERSONAL FORM**

Requested	<input type="text"/>	Memor	<input type="text"/>
Status	<input type="text"/>		
Phase	<input type="text"/>		
Planner	<input type="text"/>		
Order/UOM	<input type="text"/>		

- 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 & Qty's** 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 get created from MRP workorder message processing activity. Most of the time purchase orders are entered into manually for the stock, non-stock, and 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 a 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 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
<input type="checkbox"/>							

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

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

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 displays the 'Order Detail' window with several tabs: 'Order Detail', 'Line Defaults', 'Additional Properties', 'Category Codes', and 'Style'. The 'Order Detail' tab is active, showing fields for Order Number, Previous Order, Supplier, Ship To, Attachments, Order Date, and Order Attachment. Below these fields is a table with the following columns: Item Number, Description 1, Quantity Ordered, Tr. UoM, Unit Cost, and Extended Cost. The table currently shows 'No records found.' and has a search filter set to 'TMX'.

Item Number	Description 1	Quantity Ordered	Tr. UoM	Unit Cost	Extended Cost
No records found.					

## Step 2

Final view. Only required fields are grouped in header. Other unused tabs can be removed. You get more real estate in 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"/>	Item Number	Description 1	Quantity Ordered	Tr. UoM	Unit Cost	Extended Cost
<input type="checkbox"/>	220	Touring Bike, Red	1.00	EA	44.0000	44.00
<input type="checkbox"/>						

## **Personal Form Sales Order Entry**

Business Requirement:

Sales orders can come from EDI orders and are 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

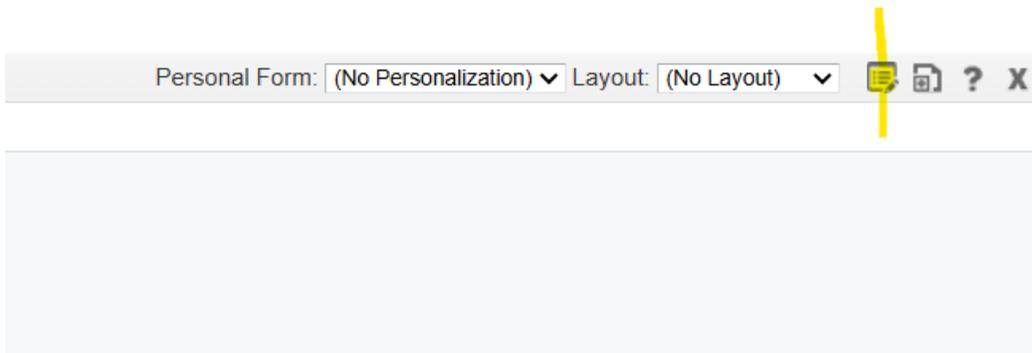
Table/Application Used: P4210

## Step 1

Open this application from your menu. If it does not exist, ask IT to deploy to your security role. You will be testing this in a 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)



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 displays a software interface titled "Customer Service Inquiry". At the top, there is a toolbar with icons for search, add, delete, and other functions, along with labels for "Form", "Row", and "Tools". Below the toolbar, there are two tabs: "Customer Service Inquiry" (active) and "Additional Selections".

The "Customer Service Inquiry" tab contains several search fields, each with a red "X" icon for deletion:

- Order Number: \* [ ] \* [ ] \* [ ]
- Customer PO: \* [ ]
- Item Number: [ ]
- Branch/Plant: \* [ ]
- Sold To: [ ]
- Ship To: [ ]

Below the search fields, a message states "No records found." To the right of this message is a dropdown menu set to "\* Basic" and a refresh icon.

A table is visible below the message, with the following columns:

<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

The table body is currently empty, consistent with the "No records found" message.

### Step 3

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

Save the composite with a unique yet clearly understandable name.

Ask IT for deployment and promotion to PD.

The screenshot displays the SAP Customer Service Inquiry form. The header section includes fields for Order Number (with a dropdown set to 'SO'), Customer PO, Item Number, Branch/Plant (set to '30'), Sold To, and Ship To. Below the header is a table with 11 columns: Order Number, Or Ty, Order Co, Line Number, Hd Cd, Sold To, Sold To Name, Quantity, UOM, and E: A. The table contains six rows of data, all with Sold To '4242 Capital System'.

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

## Personal Form Address Book Revisions

Business Requirement:

Master data management group may be responsible for 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 a 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

---

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

Alpha Name \*

Long Address Number

Tax ID

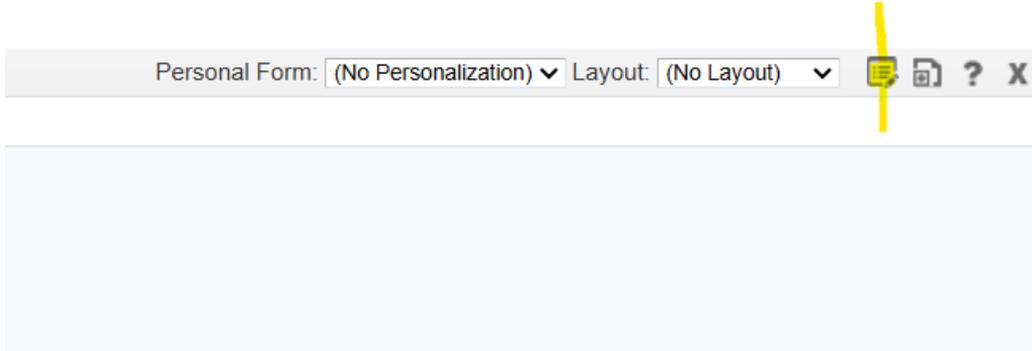
Search Type \*  Customers

Business Unit  Financial/Distribution Company

⏪

## Step 2

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



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

## Step 2

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

Please test this activity. In demo instance the fields were not enabled 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.

**Address Book Revisions - Address Book Revision**

Work With Addresses | Address Book Revision

✓ ✕ ↻ Form < > ⚙ Tools

Address Number 3001

Address Book | Cat Code 1 - 10

Alpha Name \* Global Enterprises

Long Address Number

Tax ID

Search Type \* C Customers

Business Unit 1 Financial/Distribution Company

## Publications:

<b>About the Author - List of Publications</b>		
<b>Technical Books</b>		
1	Implementing Oracle JDE UDOs	March 15, 2025
2	Implementing Oracle JDE Manufacturing Tip & Tricks	May 28, 2018
3	Implementing Oracle JDE Manufacturing	July 20, 2017

[JDE Books in Amazon](#)

[Other Books in  
Amazon](#)

## **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 three books on Oracle's JD Edwards ERP software manufacturing applications).

He also publishes weekly cartoon content on political and economic news and events on YouTube Channel. Two of his Udemy lessons have been released, one on entrepreneurship and another on self-publishing. Four 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 likes to mentor others and find their talent sitting dormant inside.

He lives near San Francisco/California & reachable by email.  
Matravikumar@gmail.com

[Www.matravikumar.com](http://www.matravikumar.com)