

Improve Order Entry Process Using JD Edwards EnterpriseOne Order Guides

Meeting the Demands of High Volume Order Entries

October 2019

Agenda

1

What is the Business Problem?

2







The Solution—Order Guides Enhancement

What is the Business Problem?

- Some industries have unique requirements that cannot be addressed by JD Edwards EnterpriseOne configuration options or base functionality
- For instance, suppliers to the food service industry including the restaurant industry routinely sell the same products to repeat customers, often on a daily basis.
- As a result, suppliers have high-volume order entries. Similarly, high-volume order entries are also generated through tele-sales





Standard Order Template






ORACLE® JD Edwards



Albanese, Margaret
[JPD910]


Work With Available Order Templates

Query: All Records 

 Tools  One View

Sold To


59310





Dixon Mfg Industries - MI Plan

Order Template


*



Records 1 - 2







Customize Grid 

	Order Template	Description
<input checked="" type="radio"/>	PRF	Peripherals
<input type="radio"/>	SFT	Software



Standard Order Template

ORACLE[®] JD Edwards



Albanese, Margaret
[JPD910]

Order Templates

Query: All Records

✓

🔍

✗

⚙️ Preload With Usual

📄 Form

⚙️ Tools

Sold To

59310

Order Template

PRF

Records 1 - 9

Quantity Ordered	UM	Item Description	Item Description 2
		4050	
		5000	
		5010	
		5022	
		4030	
		4510	
		4500	

Favorites

Form

Available Template

Order History

Preload With Usual

Customize Grid

Usual UM	Item Description	Item Description 2
15 EA	ZIP Drive 250 Meg Capacity	Electronics
15 EA	USB Flash Drive-8GB	Electronics
10 EA	Wireless Keyboard	
10 EA	Mouse-Wireless - 2.4 GHz	
10 EA	USB Wireless Card	
5 EA	USB Flash Drive-32 GB	Electronics
2 EA	Multi Printer (Print/Fax/Scan)	Electronics
1 EA	LED Printer Color 1200x600dpi	Electronics

Some Form exits that require you to leave the page and return to continue with a task

No visibility to inventory, prior order details, or pricing in the Grid display

Can add line items, but cannot update template for future orders; has limited search capabilities



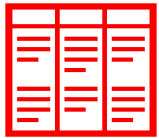
The Solution–Order Guides

- Order Guides is a fully functional enhancement that offers a user friendly alternative to the standard order templates application
- The enhancement enables sales personnel to more quickly create orders for regular customers and frequently ordered items
- This enhancement is designed to be “minimally intrusive”, and requires no modifications to the base Sales Order Entry (P42101) application, or any of the underlying Sales Order Entry applications

Order Guides-Features



The enhancement enables sales personnel to create orders more quickly for regular customers and frequently ordered items.



You can create templates of items by customer and associate customers with CSR. This association provides easy access to information during sales order entry.

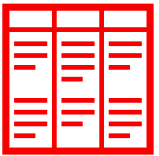


You can view a customer's credit and order details. Additionally, when an order is updated, the system recalculates the order total and available credit amounts.

Order Guides-Features



The system automatically update the Quantity Ordered field for each item in the detail area with predetermined values by clicking the Usual Quantities button.



You can view items that were ordered by a customer during a previous time frame, for example, in the last 30 days



You can view and update the price and profit margin for each line in the detail area

Setting Up JD Edwards EnterpriseOne Order Guide

- Create templates using the Order Templates program
- Assign sales team members to customers
- Set processing options for the My Customers program
- Leverage personalization to meet needs

Work With Available Order Templates

✓ 🔍 + 📄 ✕ ⚙️ Tools 🔄 One View

Sold To: 4242 Capital System

Order Template: * ▼

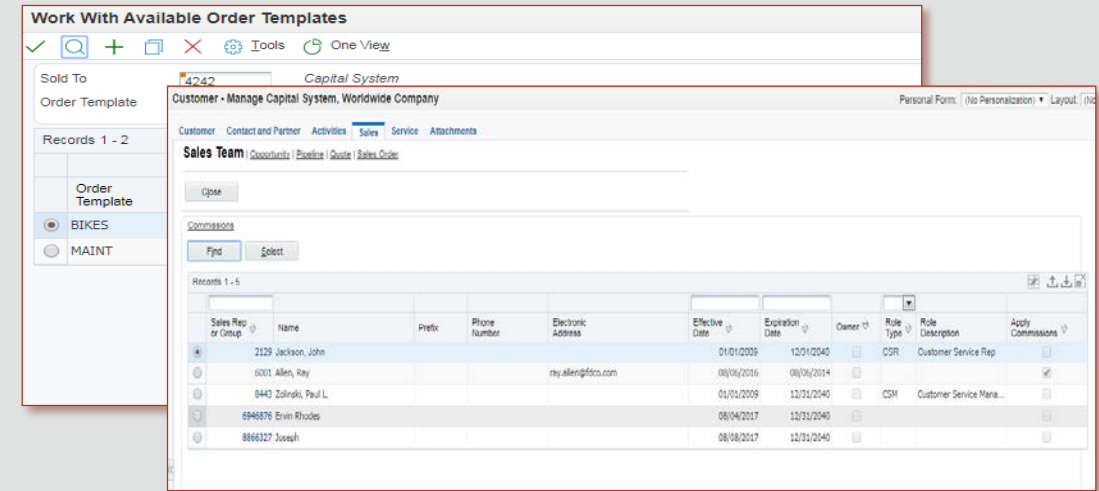
Records 1 - 2

Order Template	Description
<input checked="" type="radio"/> BIKES	Bicycles
<input type="radio"/> MAINT	Maintenance Items

-
- Set processing options for the Order Guides Power Edit program
 - Set the order guide-related processing options for the Sales Order Entry program

Setting Up JD Edwards EnterpriseOne Order Guide

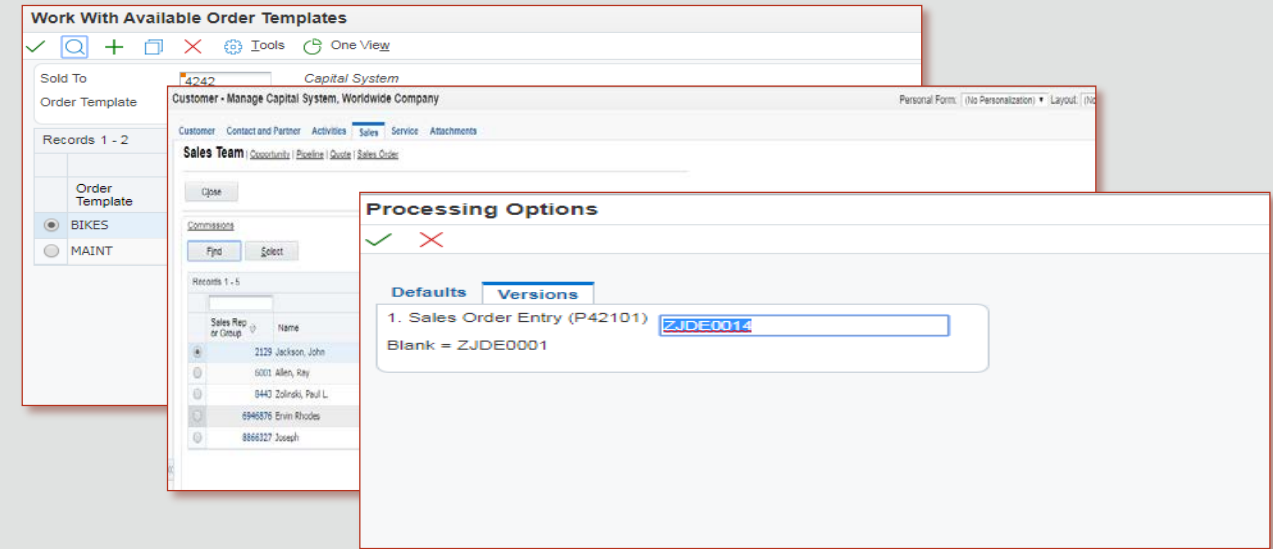
- Create templates using the Order Templates program
- Assign sales team members to customers
- Set processing options for the My Customers program
- Leverage personalization to meet needs



- Set processing options for the Order Guides Power Edit program
- Set the order guide-related processing options for the Sales Order Entry program

Setting Up JD Edwards EnterpriseOne Order Guide

- Create templates using the Order Templates program
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Setting Up JD Edwards EnterpriseOne Order Guide

- Create templates using the Order Templates program
- Assign sales team members to customers
- Set processing options for the My Customers program
- Leverage personalization to meet needs

The image shows two overlapping screenshots from the JD Edwards EnterpriseOne interface. The background screenshot is titled "Work With Available Order Templates" and shows a list of order templates. The foreground screenshot is titled "Processing Options" and shows the "Versions" tab for a specific order entry.

Work With Available Order Templates

Sold To: 4242 Capital System
Order Template: Customer - Manage Capital System, Worldwide Company

Records 1 - 2

Order Template: BIKES

Close

Commissions

Find Select

Records 1 - 5

Sales Rep or Group	Name
2129 Jackson, John	
6001 Allen, Ray	
8443 Zolinski, Paul L.	
6946876 Ervin Rhodes	
8866327 Joseph	

Processing Options

Defaults Versions

1. Sales Order Entry (P42101) ZJDE0014

Blank = ZJDE0001

- Set processing options for the Order Guides Power Edit program
- Set the order guide-related processing options for the Sales Order Entry program

The image shows a screenshot of the "Processing Options" screen for the Sales Order Entry program. The "Process" tab is selected, showing two thresholds.

Processing Options

Defaults Process Versions

1. Critical Margin Threshold 5.000

2. Warning Margin Threshold 10.000

Setting Up JD Edwards EnterpriseOne Order Guide

- Create templates using the Order Templates program
- Assign sales team members to customers
- Set processing options for the My Customers program
- Leverage personalization to meet needs

The screenshot shows the 'Work With Available Order Templates' window. The 'Sold To' field is set to '4242 Capital System'. The 'Order Template' field is set to 'Customer - Manage Capital System, Worldwide Company'. The 'Sales Team' tab is selected, showing a list of sales team members. The 'Processing Options' window is also visible, showing the 'Defaults' tab with the 'Sales Order Entry (P42101)' option set to 'Blank = ZJDE0001'.

Sales Rep or Group	Name
2129 Jackson, John	
6001 Allen, Ray	
8443 Zolinski, Paul L.	
6946876 Ervin Rhodes	
8866327 Joseph	

- Set processing options for the Order Guides Power Edit program
- Set the order guide-related processing options for the Sales Order Entry program

The screenshot shows the 'Processing Options' window. The 'Defaults' tab is selected, showing the 'Critical Margin Threshold' set to '5.000'. The 'Process' tab is also visible, showing the 'Select Items via Order Guides' option. The 'Sales Order Information' section is expanded, showing the 'Order Guide Selection' section. The 'Order Guides for Sold To Customer - Capital System' table is displayed, showing a list of order guides. The 'View Order Guides' section is also visible, showing the 'Sold To Customer' option selected. The 'Credit and Order Details' section shows the 'Credit Limit' set to '60,000.00'.

Order Guide	Delete Guide
Bicycles	
Frequently Ordered Items	

Quantity Ordered	UOM	UOM Description	Item Number	Item Description	Override Price	List Price	Current Cust	Primary UOM
	EA	Each	210	Mountain Bike, Red		793.0000	530.3400	EA
	EA	Each	221	Touring Bike, Blue		650.0000	550.0000	EA
	EA	Each	222	Touring Bike, Green		650.0000	550.0000	EA

Order Guides–Standard Features

My Customers - Customers Assigned To Allen, Ray

Personal Form: (No Personalization)

✓ 🔍 ✕ ⌵ ⚙ Row ⚙ Tools

Salesperson6001Alien, RayAccount Role-- Select One --
Customer*☐ Display Receivable and Credit Info

Records 1 - 9

Simple

--Sort By--

Customer Name	Acme Department Stores	17000	Co 00000	City Denver	State CO	80234	Create Order +
Credit Limit		Credit Available 1,499.00-	Bill To and Ship To Address				Blank 40/PC
Customer Name	Capital System	4242	Co 00000	City Atlanta	State GA	30342	Create Order +
Credit Limit	50,000.00	Credit Available 1,595,718.88-	Bill To and Ship To Address	SALEADJ	Sales Adjustment Schedule		Blank 40/PC
Customer Name	Central Distributor	4284	Co 00000	City Kansas City	State MO	64125	Create Order +
Credit Limit		Credit Available 42,148.00-	Bill To and Ship To Address			RETAIL	Retail Customers
Customer Name	Compagnie Provencale de Negoce	12386	Co 00000	City Marseille	State	13100	Create Order +
Credit Limit		Credit Available 405,588.03-	Bill To and Ship To Address	NATDIST	National Distributor		Blank 40/PC
Customer Name	Forest Gas Stations	4270	Co 00000	City Santa Fe de Bogota	State		Create Order +
Credit Limit		Credit Available 1,000,000-	Bill To and Ship To Address	GLOBAL	Global Pricing	RETAIL	Retail Customers
Customer Name	Mom & Pop Supply Company	55167	Co 00000	City Mesa	State AZ	85205	Create Order +
Credit Limit		Credit Available 8,836.40-	Bill To and Ship To Address				Blank 40/PC
Customer Name	Perth Bicycle Store	4276	Co 00000	City West Perth	State	6005	Create Order +
Credit Limit		Credit Available 56,401.38-	Bill To and Ship To Address	NATDIST	National Distributor		Blank 40/PC
Customer Name	Reading Bicycle Store	4275	Co 00000	City Reading	State	RG6 1RD	Create Order +
Credit Limit		Credit Available 35,265.70-	Bill To and Ship To Address	NATDIST	National Distributor		Blank 40/PC
Customer Name	Western Distributor	4283	Co 00000	City Los Angeles	State CA	90027	Create Order +
Credit Limit		Credit Available 137,654.75-	Bill To and Ship To Address	WHLSDIST	Wholesale/Distributor	RETAIL	Retail Customers



Order Guides–Standard Features

My Customers - Customers Assigned To Allen, Ray

Personal Form: (No Personalization)

✓ 🔍 ✕ ⌵ ⚙️ Row Tools

Salesperson: 6001 Alien, Ray Account Role: -- Select One --

Records 1 - 1

✓ 🔍 ✕ ⌵ ⚙️ Tools

Search

Customer

Credit Limit

Customer

Credit Limit

Customer

Credit Limit

Customer

Credit Limit

Customer

Credit Limit

Customer

Credit Limit

Customer

Credit Limit

Customer

Credit Limit

Customer

Credit Limit

Customer

Credit Limit

Select Items via Order Guides

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

Sales Order Information

Order Guide Selection

Order Guides for Sold To Customer - Capital System

Order Templates

Records 1 - 2

Order Guide	Delete Guide
Bicycles	✕
Frequently Ordered Items	✕

View Order Guides

- ☒ Sold To Customer
- ☐ Ship To Customer
- ☐ Any Customer
- ☐ Salesperson

Credit and Order Details

Credit Limit	50,000.00
Total Exposure	1,665,389.87
Current Order Amount	
Credit Available	1,615,389.87-

Applicable Items

Usual Quantities

Item Search

Display Last Orders

Offset Days: 30

☒ Ordered

☐ Not Ordered

Display Items

☐ All Order Guides

☐ Selected Items Only

Records 1 - 5

	Quantity Ordered	UOM	Item Number	Item Description	Override Price	List Price	Current Cost	Primary UOM	Current Margin %	Extended Amount	Quantity Available	Days Since Last Order	Last Quantity	Last UOM	Last Price	Last Cost	Last Margin %	Customer Number	Usual Quantity	Usual UOM
<input checked="" type="radio"/>		EA	1001	Bike Rack - Trunk Mount		44.9900	32.1000	EA	28.651		176	3117	1	EA	10.0000	32.1000		4242		
<input type="radio"/>		EA	210	Mountain Bike, Red		798.0000	530.3468	EA	33.541		9371	367	100	EA	798.0000	530.1000	33.57	4242	10	EA
<input type="radio"/>		EA	221	Touring Bike, Blue		650.0000	550.0000	EA	15.385		814	367	100	EA	650.0000	550.0000	15.38	4242	5	EA
<input type="radio"/>		EA	222	Touring Bike, Green		650.0000	550.0000	EA	15.385		1227	367	100	EA	650.0000	550.0000	15.38	4242	5	EA
<input type="radio"/>		EA	220	Touring Bike, Red		650.0000	55.0000	EA	91.538		44538919	367	100	EA	650.0000	550.0000	15.38	4242	5	EA

Selected Row Details



Extend Order Guides Features with Personalization

Select Items via Order Guides

Order Guide Selection

Order Guides for Sold To Customer - Capital System

Order Templates

Records 1 - 2

Order Guide	Delete Guide
Bicycles	
Frequently Ordered Items	

View Order Guides

☒ Sold To Customer

☐ Ship To Customer

☐ Any Customer

☐ Salesperson

Credit and Order Details

Credit Limit: 50,000.00

Total Exposure: 1,647,386.83

Current Order Amount:

Credit Available: 1,597,386.83-

Applicable Items

Usual Quantities

Item Search

Display Last Orders

Offset Days: 30

☒ Ordered

☐ Not Ordered

Display Items

☐ All Order Guides

☐ Selected Items Only

Records 1 - 6

Quantity Ordered	UOM	Item Number	Item Description	Override Price	List Price	Current Cost	Primary UOM	Current Margin %	Quantity Available	Days Since Last Order
<input checked="" type="radio"/>	EA	210	Mountain Bike, Red		793.0000	530.3468	EA	33.121	9340	368
<input type="radio"/>	EA	221	Touring Bike, Blue		650.0000	550.0000	EA	15.385	829	368
<input type="radio"/>	EA	222	Touring Bike, Green		650.0000	550.0000	EA	15.385	1232	368
<input type="radio"/>	EA	220	Touring Bike, Red		650.0000	55.0000	EA	91.538	44538923	368
<input type="radio"/>	EA	2006	Touring Fork		53.7900	46.2500	EA	14.017	500	
<input type="radio"/>	EA	230	Youth Sport Bike		145.0000	120.4000	EA	16.968	4816	368

Item/Branch Plant Info.

Item Number: 210

Mountain Bike, Red

Branch/Plant: 30

Basic Branch/Plant Data

Line Type: S

Stock Inventory Item

Buyer Number: 8444

O'Malley, James

Supplier Number:

Delivery Notes:

Country of Origin: Default Country

Sales Taxable: Y

Ln is subj to applicable taxes

☒ Check Availability

☒ Backorders Allowed

Personal Form: Simplified

Layout: Customer Info2

Price Adjustments / Check Price - Advanced Pricing Price check and A...

Check Price and Availability

Net Quantity To Pay

Currency Code: USD

Address Number: 4242

Ship To: 4242

Item Number: 210

Quantity From: 1

Branch/Plant: 30

Adjustment Schedule: SALEADJ

Records 1 - 3

Seq No.	Adj Name	Desc	Factor	Value	Unit Price
		Base Price			798.0000
10	SALEADJ			5.0000-	5.0000- 5

Unit Cost: 530.3468

Unit Price: 793.0000



Extend Order Guides Features with Personalization

Select Items via Order Guides

Tools

Order Guide Selection

Order Guides for Sold To Customer - Capital System

Order Templates

Records 1 - 2

Order Guide

Delete Guide

Bicycles

Frequently Ordered Items

View Order Guides

Sold To Customer

Ship To Customer

Any Customer

Salesperson

Credit and Order Details

Credit Limit

50,000.00

Total Exposure

1,647,386.83

Current Order Amount

Credit Available

1,597,386.83

Applicable Items

Usual Quantities

Item Search

Display Last Orders

Offset Days

30

Ordered

Not Ordered

Display

Records 1 - 6

Quantity Ordered	UOM	Item Number	Item Description	Override Price	List Price	Current Cost	Primary UOM	Current Margin %	Qu Av
1	EA	210	Mountain Bike, Red		793.0000	530.3468	EA	33.121	
1	EA	221	Touring Bike, Blue		650.0000	550.0000	EA	15.385	
1	EA	222	Touring Bike, Green		650.0000	550.0000	EA	15.385	
1	EA	220	Touring Bike, Red		650.0000	55.0000	EA	91.530	
1	EA	2006	Touring Fork		53.7900	46.2500	EA	14.017	
1	EA	230	Youth Sport Bike		145.0000	120.4000	EA	16.968	

Item/Branch Plant Info.

Item/Branch Plant Info. - Branch/Plant Item Information

Item Number

210

Mountain Bike, Red

Branch/Plant

30

Basic Branch/Plant Data

Line Type

S

Stock Inventory Item

Delivery Notes

Check

Buyer Number

8444

O'Malley, James

Country of Origin

Default Country

Backo

Supplier Number

Sales Taxable

Y

Ln is subj to applicable taxes

Meeting 06 June 2018

Personal Form: Simplified

Layout: Customer Info2

Price Adjustments / Check Price - Advanced Pricing Price check and A...

Late Sales Order Lines by Item

Last updated : 6/4/2018 12:20:06

Backordered Sales Order Lines by Item

Last updated : 6/4/2018 12:20:06

Extend Order Guides Features with Personalization

Select Items via Order Guides

Personal Form: Simplified Layout: Customer Info2

Price Adjustments / Check Price - Advanced Pricing Price check and A...

Select Items via Order Guides

Personal Form: Simplified Layout: Customer Info

Late Orders by Item - Sale Order Entry - Analytic Components

Select Items via Order Guides

Personal Form: Simplified Layout: Item Info2

Records 1 - 6

Quantity Ordered	UOM	Item Number	Item Description	Override Price	List Price	Current Cost	Primary UOM	Current Margin %	Quantity Available	Days Since Last Order
<input checked="" type="radio"/>	EA	210	Mountain Bike, Red		793.0000	530.3468	EA	33.121	9340	368
<input type="radio"/>	EA	221	Touring Bike, Blue		650.0000	550.0000	EA	15.385	829	368
<input type="radio"/>	EA	222	Touring Bike, Green		650.0000	550.0000	EA	15.385	1232	368
<input type="radio"/>	EA	220	Touring Bike, Red		650.0000	55.0000	EA	91.539	44538923	368
<input type="radio"/>	EA	2006	Touring Fork		53.7900	46.2500	EA	14.017	500	
<input type="radio"/>	EA	230	Youth Sport Bike		145.0000	120.4000	EA	16.965	4816	368

Work With Sales Ledger Inquiry - Sales Ledger Inquiry

Query: All Records

Order Number * SO * Branch/Plant 30 Customer PO * Item Number 210 Additional Selections Exist

Records 1 - 10

Order Number	Order Type	Order Co	Line Number	Sold To	Alpha Name	Quantity Ordered	Quantity Shipped	Amount Ordered	Amount Shipped	Cur Cod	Last Stat	Next Stat	Ship To Number	Item Description	Ln Ty
2465	SO	00001	1.000	3555	Pro Bike Shop	20	20	14,364.00	14,364.00	USD	520	540	3555	Mountain Bike, Red	S
2465	SO	00001	1.000	3555	Pro Bike Shop	20	20	14,364.00	14,364.00	USD	560	580	3555	Mountain Bike, Red	S
2465	SO	00001	1.000	3555	Pro Bike Shop	20	20	14,364.00	14,364.00	USD	580	999	3555	Mountain Bike, Red	S
2614	SO	00001	1.000	3007	Schwartz Warenhaus Gemeinschaft	2	2	1,596.00	1,596.00	EUR	520	540	3007	Mountain Bike, Red	S
2614	SO	00001	1.000	3007	Schwartz Warenhaus Gemeinschaft	2	2	1,596.00	1,596.00	EUR	580	620	3007	Mountain Bike, Red	S
2614	SO	00001	1.000	3007	Schwartz Warenhaus Gemeinschaft	2	2	1,596.00	1,596.00	EUR	560	580	3007	Mountain Bike, Red	S



Extend Order Guides Features with Personalization

Select Items via Order Guides

Personal Form: Simplified Layout: Customer Info2

Price Adjustments / Check Price - Advanced Pricing Price check and A...

Select Items via Order Guides

Personal Form: Simplified Layout: Customer Info

Late Orders by Item - Sale Order Entry - Analytic Components

Select Items via Order Guides

Personal Form: Simplified Layout: Item Info2

Select Items via Order Guides

Personal Form: Simplified Layout: Item Search

Applicable Items

Item Search

Display Last Orders

Offset Days 30

Ordered

Not Ordered

Display Items

All Order Guides

Selected Items Only

Records 1 - 6

Quantity Ordered	UOM	Item Number	Item Description	Override Price	List Price	Current Cost	Primary UOM	Current Margin %	Quantity Available	Days Since Last Order
	EA	210	Mountain Bike, Red		793.0000	530.3468	EA	33.121	9340	368
	EA	221	Touring Bike, Blue		650.0000	550.0000	EA	15.385	829	368
	EA	222	Touring Bike, Green		650.0000	550.0000	EA	15.385	1232	368
	EA	220	Touring Bike, Red		650.0000	55.0000	EA	91.538	44538923	368
	EA	2006	Touring Fork		53.7900	46.2500	EA	14.017	500	
	EA	230	Youth Sport Bike		145.0000	120.4000	EA	16.966	4816	368

Work With S

Order Number

Customer PO

Item Number

Records 1 - 1

Work with Item Word Search - Item Word Search - Non Shopping Cart Mode

Query: All Records

Item Search Text cro-

Records 1 - 9

Description	Description Line 2	Item Number	Short Item No
Cro-Moly Frame, Red		2001	60062
Cro-Moly Frame, Two Tone		2002	60071
Cro-Moly Frame, Green		2003	60089
Cro-Moly Frame		2004	60097
25 mm Cro-Moly Tubing		9001	60839



Extend Order Guides Features with Personalization

Select Items via Order Guides

Personal Form: Simplified Layout: Customer Info2

Price Adjustments / Check Price - Advanced Pricing Price check and A...

Order Guide

Records 1 - 2

Order Template

Bicycles

Frequently

Applicable Items

Usual Quantities

Item Search

Display Last Orders

Display Items

Select Items via Order Guides

Personal Form: Simplified Layout: Customer Info

Late Orders by Item - Sale Order Entry - Analytic Components

Select Items via Order Guides

Personal Form: Simplified Layout: Item Info2

Select Items via Order Guides

Personal Form: Simplified Layout: Item Search

Records 1 - 6

Applicable Items

Usual Quantities

Item Search

Display Last Orders

Offset Days 30

Ordered

Display Items

All Order Guides

Selected Items Only

Simple

Current Margin %

Quantity Available

Days Since Last Order

33.121

9340

368

15.385

829

368

15.385

1232

368

91.538

44538923

368

14.017

500

368

16.966

4816

368

Select Items via Order Guides

Records 1 - 2

Order Guide

Delete Guide

Bicycles

Frequently Ordered Items

Applicable Items

Usual Quantities

Item Search

Records 1 - 6

Quantity Ordered

UOM

Item Number

Item Description

Override Price

List Price

Current Cost

EA

210

Mountain Bike, Rec

793.0000

53

EA

221

Touring Bike, Blue

650.0000

59

EA

222

Touring Bike, Gre...

650.0000

59

EA

220

Touring Bike, Red

650.0000

5

EA

2006

Touring Fork

53.7900

4

EA

230

Youth Sport Bike

145.0000

12

Selected Row Details

Item/Branch

Item Number

Basic Branch

Line Type

Buyer Number

Supplier Number

Work With S

Order Number

Customer PO

Item Number

Records 1 - 1

Work with Item

Item Search Text

Records 1 - 9

Descript

Cro-Moly

Cro-Moly

Cro-Moly

Cro-Moly

25 mm C



Thank You!

