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ERP systems specialists

JD Edwards Nordic Conference 2024

Tips & Trix

Fun with Preferences and
Supplemental Data!



JD Edwards Nordic Conference 2024

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Supplemental Data

There is hope for data without a home!



Agenda

- + What is the Supplemental Database (SDB)
- + Use cases
- + *Hands on demo*
- + How you use it
- + Why you would use it
- + Why you wouldn't use it
- + Considerations
- + Applications used



What is the Supplemental Database?

A user defined database within JDE
consisting of:

- Keys – SDB Code
 - How do we connect the SDB to existing master data or transactions
- Dimensions – SDB Data Types
 - Which information do we want to store
- Values
 - The actual information

Use Cases

+ Item Master

- Additional Attributes
- Warranty info

+ Work Orders

- Transactional records
- Machine readings
- Job notes

+ Human Resources

- Employee

- Applicants
- Certifications info
- Training records

+ Asset management

- Machine readings
- Maintenance schedules

+ Logs

- Weather log
- Narrative info

- Additional order information

+ Address Book

- Vendor delivery quality

- Customer delivery instructions

- Customer shipping accounts (FedEx, UPS)

+ Classified Information

- Patient info

- etc

Hands On

SDB Code - Keys

The user defines HOW the data should relate to other JDE data
Allows us to connect additional data/information to all kinds of existing data in JDE:

- Additional item information
- Additional customer or supplier information
- New information that does not exist anywhere without having to create new files, tag files etc
- *Example: we create an SDB Code that uses Item Number + Business Unit. This allows us to create new information stored on Item Branch level.*

SDB Data Type - Dimensions

- The user defines GOUPS OF INFORMATION that should be allowed to be entered
- The dimension holds the actual values
- Many dimensions can be attached to an SDB Code (Key)
- A dimension should contain similar or related information
 - *Example: we create dimensions on Item Master level called*
 - *Additional temperature settings*
 - *Item dimensions*
 - *Printed Documents*

This is data modelling - the hard part

SDB Data - Values

- The actual information we need to store
- Each dimension can have multiple sets of the same values
 - This allows us to store previous values of the same information for e.g.
 - Keeping logs of previous values
 - Use Effective dates for the values
 - Be careful if only one set of values should be used at a time

SDB Data – Attachments and program links

Not only data values can be stored:

File + text attachments can be stored on the dimension

- Different dimensions can be setup for different types of attachments

Exits to other JDE programs can be defined

- The program needs to use the same keys as defined in the SDB
- Sometimes it works, sometimes it does not, depending on the logic in the attached application (similar to CAFE1) – trial and error

When to use SDB

- + When the business need to store new information that does not “fit” in existing application without having to place Change Requests
- + When we don't want to modify standard applications to be able to store the information (and we don't want to modify)
- + When we need to group information that is related
- + When the information does not change dramatically all the time
- + Etc

When NOT to use SDB

- When the information is related to e.g. transactions of very high volumes
 - A couple of 100 000 records per key definition is fine but maintenance may be tricky
- When the data need special formatting or special validations
- When the entered data should trigger actions or system events

But Orchestrations and Logic Extensions solve this!

To consider when setting up the SDB

Primary Data vs. Supplemental Data

SDB Keys Questions:

- What is your primary data?
- What are the keys to your primary data?

SDB Data Type Questions

- What supplemental data needs a “home”?
- What are the “data types” of your supplemental data?
- How many instances of supplemental data will exist for each combined key?

How do you want to see the data displayed?

- Validated?
- Free entry?
- Formatted?
- With customized grids?

Finally - Supplemental Data,
Orchestrations & LEX and
Form Extensions are best
friends



Applications Used

+ P00091 – Work With Supplemental Database Setup

- + Name the supplemental database
- + Declare the keys
- + Identify what you want to do with the SDB
- + Store structured data
- + Access other application
- + Record narrative text
- + Override default column names for structured data fields
- + Specify related application names and versions

+ P00092 – Supplemental Data

- + Access a specific supplemental database

+ OMW

- + Create versions of P00092 for each supplemental database

+ And of course all other applications that can be linked to the SDB through CAFE1, Orchestrations, Form Extensions or code!

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Wrap up:

Supplemental Data is perfect for storing information only using setup and without having to develop new tables.

It can easily be linked to existing transactions or masterdata.

Preferences

The system provides predefined preferences to specify how the system processes the order. These preferences are defined as either **basic**, or **advanced**. Basic preference profiles are based on specific preference types that you use to override the way the system processes orders. Basic preferences are helpful when customizing a specifically defined business requirement.

Advanced preferences use many of the same preference types you use in basic preference profiles, but also provide more detailed and complex processing capabilities. Advanced preferences use similar logic as the JD Edwards EnterpriseOne Advanced Pricing system from Oracle.

When you use advanced preferences, you can also use complex customer groups and complex item groups to specify how the system processes the order.

Advanced preference are set up with schedules that specify how the system processes the preferences.

Advanced Preferences are applied before Basic Preferences.

Advanced Preferences

When using Advanced Preferences, the system performs the following steps:

- Checks the System Constants to see if a Preference Schedule has been entered.
- Checks the processing option for Sales Order Entry (P4210) to see if there is an override schedule (if resolving Sales Order preferences).

If a schedule exists, verify whether the specific preference type has been defined for that schedule. If the preference type is defined for the schedule, the Advanced Preference logic is performed to resolve the preference.

If no schedule was found or the preference type was not found to be defined for the schedule, preferences will be resolved the old (basic) way.

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Advanced Preferences

Define a complex Item or Customer Group on the Advanced Pricing menu. In this example we use Category Code SRP4 on the Item Branch.

The complex item group is then linked to the Preference Definition.

Item Price Groups - Work with Price Group Definition

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Price Group 1 *Item Price Group*

Records 1 - 1

	TYPE			
<input type="checkbox"/>	Price Group	Description	Grp Key 1	Category Code 1
<input type="checkbox"/>	TYPE	Bike Type	SRP4	Sales Category Code 4

Preference Definition Revisions

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Adjustment Controls

Preference Name

Options

Groups

Item Group *Bike Type*

Customer Group

Preference Specifications

Preference Hierarchy *Pricing Hierarchy*

Advanced Preference Type *Next Order Status*

Level Break Type

Quantity Level Break

None

Preference Options

Preference History

Enable Enhanced Basket

Advanced Preferences

Use the Next Status preference to limit what a particular customer is allowed to buy. This customer is not allowed to buy bikes of type 777 from branch plant 30. All other types are fine.

Work With Item Branch Personal Form: (No Personalization) Layout: (No Layout) Query: All Reco

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Item Number

Records 1 - 10 > ⌵

<input type="checkbox"/>	Branch/Plant	Item Number	Description	Description 2	Search Text	Stocking Type	Line Type	Sales Code 1	Sales Code 2	Sales Code 3	Sales Code 4	Sales Code 5
<input type="checkbox"/>	30	1001	Bike Rack - Trunk Mount		Bike, Rack	P	S					
<input type="checkbox"/>	30	210	Mountain Bike, Red		Bike, Mountain	S	S	BIK	MNT		777	357
<input type="checkbox"/>	30	230	Youth Sport Bike		Bike, Youth Sport	P	S	BIK	COM		999	357
<input type="checkbox"/>	30	220	Touring Bike, Red		Bike, Tour	P	S	BIK	TRG		888	357
<input type="checkbox"/>	30	221	Touring Bike, Blue		Bike, Tour	P	S	BIK	TRG		888	357
<input type="checkbox"/>	30	222	Touring Bike, Green		Bike, Tour	M	S	BIK	TRG		888	357

Advanced Preferences

Instead of defining all item numbers where SRP4=777 in the Customer Billing Item Restrictions, we can define a preference that automatically cancels any order line of that type.

Preference Detail Revisions

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Preference Name *Next Order Status*

Item Price Group *Bike Type*

Records 1 - 2

<input type="checkbox"/>	<input checked="" type="checkbox"/>	Customer Number	Customer Name	Effective Date	Expired Date	Item Group	Sls Cd4
<input type="checkbox"/>	<input checked="" type="checkbox"/>	55167	Mom & Pop Supply Company	2024-01-01	2040-12-31	TYPE	777

Advanced Preferences Schedule Revisions - Preference Values Revisions

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Preference Name *Next Order Status*

Advanced Preference Type *Next Order Status*

Records 1 - 2

<input checked="" type="radio"/>	<input type="checkbox"/>	Sequence	Last Stat	Or Ty	Ln Ty	Business Unit	Next Stat
<input checked="" type="radio"/>	<input type="checkbox"/>	10,00		SO	S	30	999

Advanced Preferences

When placing an order in B/P 30 for that customer, any line where the item is of type SRP4=777, the line will be automatically cancelled.

Enter New Order Personal Form: (No Personalization) Layout: (No Layout)

Summarize Order Submit and Enter New Submit and Close Cancel

Sales Order Header Line Advisor Order Profit Order Summary

Edit Full Header Order Address Credit Check Attachments Credit Memo Go To -- Select One --

Order Number 3662 SO 00001 Previous Order Number
Sold To 55167 Mom & Pop Supply Company Hold Code Blank - Hold Codes 42/HC
Ship To 55167 Mom & Pop Supply Company Order Date 2024-05-12
Branch/Plant 30 Credit Message
Customer PO Temporary Credit Msg
Currency USD Exchange Rate Base Currency USD Foreign

Sales Order Detail Line Availability Free Goods Line Defaults

Check Availability Cancel Line Check Price Price History Kits/Configurator Cross Reference More Row Actions -- Select One --

Records 1 - 3 Adv Pref

Quantity Ordered	UOM	Item Number	Line Advisor	Supply Monitor	In Fulfillment	Line Type	Unit Price	Extended Price	Branch/Plant	Line Number	Requested Date	Requested Time	Description	Last Status	Next Status
<input type="checkbox"/>	1 EA	230			<input type="checkbox"/>	S	145,000	145,00	30	1,000	2024-05-12		Youth Sport Bike	540	560
<input type="checkbox"/>	1 EA	210			<input type="checkbox"/>	S			30	2,000	2024-05-12		Mountain Bike, Red	540	999

Advanced Preferences – What Is New?

The ability to exclude days, such as weekends or holidays.

The system now allows the user to use the workday calendar in both

- Delivery Date preference and
- Order Preparation Date preference

There is a new processing option added in P4210 under Preference tab.

The user also can select the calendar type and the same calendar type will be used on both the preference.

Both Basic and advanced preference are enabled with the workday calendar.

Wrap-Up

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Wrap up:

Advanced Preferences gives you great flexibility in how the system processes sales orders.

Explore how you can benefit from using Advanced Preferences.

Find out more:



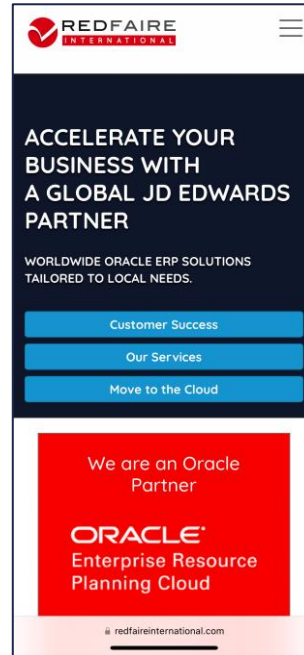
The screenshot shows the xperitus website. At the top, there is a navigation bar with the xperitus logo, a globe icon, and a menu icon. The main content area features a dark blue background with the text "ERP Systems Specialists" and a sub-headline "xperitus is an Oracle Partner and experts in the ERP systems NetSuite and JD Edwards. 15 years of experience in implementing ERP for the manufacturing industry, distributors, wholesalers, and Field Service." Below this is a red button that says "Book a Consultation". At the bottom, there is a section for "ORACLE JD Edwards" and a promotional banner for "JD Edwards Nordic Conference" on "Tuesday, 14 May, 2024" at "Hotel Jacyz, Gothenburg, Sweden". The footer contains logos for xperitus, ORACLE, REDFAIRE INTERNATIONAL, and Cadran.

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The screenshot shows the LearnJDE website. At the top, there is a navigation bar with a search icon, a social media icon, and a menu icon. The main content area features a dark background with the text "Announcing JD Edwards EnterpriseOne Release 24". Below this is a section for "Register for BLUEPRINT 4D" with the dates "May 7 - 10, 2024" and the location "Dallas, Texas". At the bottom, there is a section for "Premier Support for EnterpriseOne Extended through at least 2035!" with a "Learn More" button. The footer contains a social media icon and a menu icon.

[LearnJDE | JD Edwards Resource Library \(oracle.com\)](#)



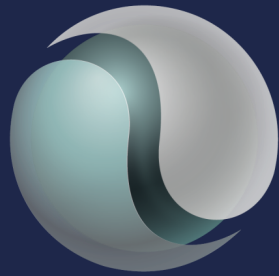
The screenshot shows the Redfaire International website. At the top, there is a navigation bar with the Redfaire International logo and a menu icon. The main content area features a dark background with the text "ACCELERATE YOUR BUSINESS WITH A GLOBAL JD EDWARDS PARTNER". Below this is a section for "WORLDWIDE ORACLE ERP SOLUTIONS TAILORED TO LOCAL NEEDS." with three blue buttons: "Customer Success", "Our Services", and "Move to the Cloud". At the bottom, there is a red section with the text "We are an Oracle Partner" and "ORACLE Enterprise Resource Planning Cloud". The footer contains the website URL "redfaireinternational.com".

[Redfaire International | Oracle JD Edwards and ERP Cloud Consultants \(EN\)](#)



The screenshot shows the Cadran website. At the top, there is a navigation bar with the Cadran logo, the text "NL | EN", and a menu icon. The main content area features a dark red background with the text "The leading Oracle partner in The Netherlands". Below this is a section for "With 25 years of experience with implementation, support & hosting of ERP-systems for wholesale, manufacturing and commodity trade." with a red button that says "Discover our ERP solutions". At the bottom, there is a section for "ORACLE JD EDWARDS" with a list of services: "Oracle JD Edwards >", "Oracle JD Edwards ERP", "Oracle JD Edwards Add-ons", and "Oracle JD Edwards Commodity Trade".

[Cadran | Oracle ERP Specialist for Wholesale & Industry](#)



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