

More4apps

Functional Impact Document

Customer Wizard

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Release 3.1.48 – 23/08/2021

This release includes various bug fixes and enhancements/changes.

1.1. New DFF's Added

Version: 3.1.43

Date: 06/08/21

Profile Amount DFF columns added at Customer and Site Use level.

Customer Profile Amount DFF

Customer Profile Amount Context	Customer Profile Amount Attribute1	Customer Profile Amount Attribute2	Customer Profile Amount

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Site Use Profile Amount DFF

Site Use Profile Amount Context	Site Use Profile Amount Attribute1	Site Use Profile Amount Attribute2	Site Use Profile Amount

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1.2. New Column Added

Version: 3.1.39

Date: 22/07/21

'New Party Name' column added for updating a Party Name. Previously the column 'Party Name' was used for both Create and Update actions. 'Party Name' is now only uploaded when creating new customers.

Customer Action Party Name New Party Name		
Create	Computer Service Ltd	
Update	Modern Truck	Modern Truck Ltd

1.3. New Download Filter Added	
Version: 3.1.30	Date: 09/04/21
<p>'Site Use Primary' added as filter for Download via Sheet.</p>	
1.4. New Download Filter Added	
Version: 3.1.28	Date: 22/03/21
<p>'Account Site Active' added as filter for Download via Sheet.</p>	
1.5. New Download Filter Added	
Version: 3.1.27	Date: 22/03/21
<p>'Party Site Active' added as filter for Download via Sheet.</p>	
1.6. New Profile Option Added	
Version: 3.1.23	Date: 04/03/21
<p>New profile option added - More4Apps: CW Enable Business Events. By default, Business Events are disabled during upload. Change this profile option to 'Yes' to enable Business Events related to the creating and updating of customer accounts.</p>	

Release 3.1.16 – 25/11/2020

This release includes various bug fixes and enhancements/changes.

1.1. New Download Filters Added

Version: 3.1.07

Date: 17/09/20

Profile Org Ext Group, Party Org Ext Group and Party Site Ext Group added as filters for Download via Sheet.

1.2. Added Background Processing Upload Option

Version: 3.1.00

Date: 17/08/20

New upload options 'Background Upload Selected' and 'Background Upload All' added.

This option is recommended for large uploads.

Uploads will be completed via a concurrent request. Once complete, users select 'Refresh Concurrent Status' to return the results to the sheet.

Full instruction for this new upload option can be found [here](#).

1.3. Account ID and Party ID now populated during Validation

Version: 3.0.94

Date: 28/07/20

Previously to update or create customer account information, both the Party and Customer ID's needed to exist in the worksheet. The Wizard will now automatically populate these ID's during validation, using the values in the corresponding Party and Account number columns.

Release 3.0.78 - 05/03/2020

This release includes various bug fixes and enhancements/changes.

1.1. New More4apps Brand Applied

Version: 3.0.70

Date: 19/02/20

This will have no functional impact on users and is purely a cosmetic update.

Existing templates with previous styles will work with this version. Note however the colors may change in these sheets when invoking Wizard functionality.

1.2. Added Extension Package Option

Version: 3.0.68

Date: 17/02/20

- Customer Wizard now includes an extension package (M4APS_CW_EXTENSION) that you can modify to meet your unique validation requirements.

To activate this, profile option “More4Apps: CW Enable Extension Pkg” should be set to ‘Y’.

After activating, the Wizard will always callout to this package, however modifying the extension package is optional.

Please refer to our updated user guide for full details https://horizon.more4apps.com/doco/CWRelease/output/extension_package.htm.

1.3. New Download Filters Added

Version: 3.0.67

Date: 13/02/20

- Customers can now use Party Site Original Reference and Account Site Original Reference as filters when downloading via sheet.

1.4. Bank Mode Updated with new Fields Added

Version: 3.0.55

Date: 09/01/20

Party Name Acc Owner Party Number Acc Owner	

- Bank mode has been improved to allow greater control of the Bank Owner and assignments, in line with the Oracle forms functionality.
- New fields Party Name Acc Owner and Party Number Acc Owner added.
- Customer Account Name and Customer Account Number have moved to the Assignment section.

Release 3.0.51 - 19/12/2019

This release includes various bug fixes and enhancements/changes.

1.1. New Column Added

Version: 3.0.38

Date: 27/08/19

Site Primary Sales Rep Number column added.

Site Primary Sales Rep	Site Primary Sales Rep Number

1.2. Added Search Control to Profile Class

Version: 3.0.37

Date: 23/08/19

Profile Class now has a search control.

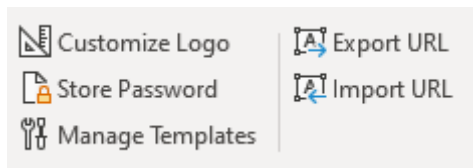


1.3. Updated Format Sheet to Customize Logo

Version: 3.0.26

Date: 18/06/19

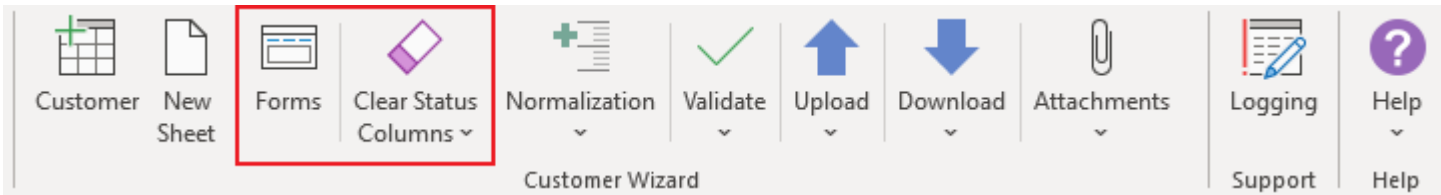
'Format Sheet' changed to 'Customize Logo'.



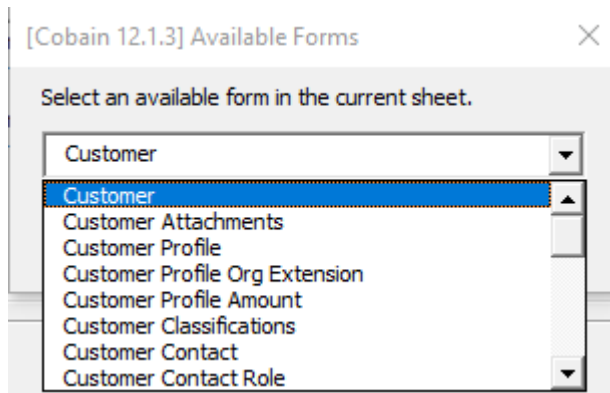
1.4. Added 'Clear Status Columns' and 'Forms' Options

Version: 3.0.12

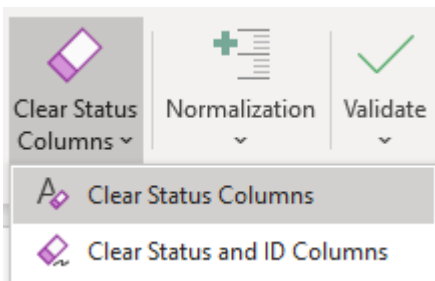
Date: 09/05/19



- New 'Forms' button added to ribbon - This allows you to navigate directly to the relevant form.



- 'Clear Status' has been improved. There is now the option to clear ID columns as well as the status columns.



Release 3.0.00 - 11/03/2019

This is a major release of Customer Wizard which has significant changes and performance updates.

Whilst we at More4Apps have tried to maintain the same look and user interaction, some functionality has been modified. You **cannot** use your previous template/worksheets in this new version as there are no longer shared columns and the layout structure of the Wizard has changed with the addition of Upload Status columns and data layout changes.

Note: Any macros used to write data to your current worksheet will need to be updated. If More4Apps previously supplied your macros please log a support call to have your macros updated.

There are no specific Customer Wizard packages required as all code is contained within the More4Apps workbook. The More4Apps servlet and shared packages are still required.

This release enables templating to better control access to functions with the Wizard and the default behaviour of columns. System Administrators may wish to take advantage of implementing this. More information can be found by clicking [here](#).

1.1. Added New Color Scheme

Version: 2.3.56

Date: 26/02/19

More4Apps has implemented a new color scheme. See below for an example:

				Customer									
Customer Status	Party Site Status	Account Site Status	Site Use Status	Customer Messages	Party ID	Customer ID	Customer Action	Party Type	Party Active	Party Name	Party Number	Account Name	Acco
<i>Default Values</i>													
Accepted	Accepted	Accepted Accepted			1128915	348826	Create	Organization	Active	New Customer	201177	Related1	1722

1.2. Site section has been split into two separate sections: Party Site (with Address subsection) and Account Site

The rationale behind this is: As a background process, Oracle uses the Address (location) and Party Site in the creating or updating of an Account Site. As More4Apps uses the public APIs, these sections need to be visible and entered in that logical order (as above) to create/update Account Sites.

Screenshots of the new sections below:

'Party Site' Section

Party Site												
Party Site Messages	Party Site ID	Location ID	Party Site Action	Party Site Name	Party Site Number	Party Site Identifying	Party Site Active	Party Site Addressee	Party Site Original Reference	Geography Code Override	Alternate Name	Location Original Reference

Address (subsection of Party Site Section)

Address									
Country	Address1	Address2	Address3	Address4	City	Postal Code	State	Province	County

'Account Site' Section

Account Site										
Account Site Messages	Account Site ID	Account Site Action	Account Site Operating Unit	Account Site Original Reference	Account Site EDI Location	Account Site Key Account	Account Site Active	Account Site Translation	Account Site Territory	Account Site Category

The corresponding DFFs reside within the applicable section.

For further information on these sections, please refer to the [user guide](#).

1.3. Account Site Address Sharing

There is often a need to create a new Account Site in a different Operating Unit and share the same Address as an existing Account Site in another Operating Unit.

Note - That as a background process, Oracle uses the Address (location) and Party Site in the creating or updating of an Account Site. As More4Apps uses the public APIs these sections need to be visible and entered as above to create/update Account Sites.

Create new Customer and Account Sites:

This can be achieved by the following steps:

1. Enter Customer details as required

Customer								
Customer Messages	Party ID	Customer ID	Customer Action	Party Type	Party Name	Party Number	Account Name	Account Number
			Create	Organization	New Customer		Related1	

2. Enter the Party Site and Address details

Party Site						Address		
Party Site Messages	Party Site ID	Location ID	Party Site Action	Party Site Name	Party Site Number	Country	Address1	City
			Create	New Party Site		New Zealand	1 David Street	Hamilton

3. Enter Account Site Details for Operating Unit 1 and Operating Unit 2

Account Site			
Account Site Messages	Account Site ID	Account Site Action	Account Site Operating Unit
		Create	Vision Services
		Create	Vision Operations

4. Upload.
5. The Customer, Party Site and Account Site 1 have been created, Account Site 2 has been created in Operating Unit 2 using the same address and Account Site 1.

Customer

				Customer									
Customer Status	Party Site Status	Account Site Status	Site Use Status	Customer Messages	Party ID	Customer ID	Customer Action	Party Type	Party Active	Party Name	Party Number	Account Name	Account Number
Default Values													
Accepted	Accepted	Accepted	Accepted		1128915	348826	Create	Organization	Active	New Customer	201177	Related1	17226

Party Site and Account Sites

Party Site						Address			Account Site				
Party Site Messages	Party Site ID	Location ID	Party Site Action	Party Site Name	Party Site Number	Country	Address1	City	Account Site Messages	Account Site ID	Account Site Action	Account Site Operating Unit	
	774182	65923	Create	New Party Site	80488	New Zealand	1 David Street	Hamilton		23097	Create	Vision Services	
										23098	Create	Vision Operations	

6. Perform a download using Account Site ID for Operating Unit 2 to confirm that the same address was used.

Party Site						Address			Account Site				
Party Site Messages	Party Site ID	Location ID	Party Site Action	Party Site Name	Party Site Number	Country	Address1	City	Account Site Messages	Account Site ID	Account Site Action	Account Site Operating Unit	
	774182	65923		New Party Site	80488	New Zealand	1 David Street	Hamilton		23098		Vision Operations	

Please note: In a Multi-Org Access Controlled Responsibility this can be done in one upload. If using a Single Org Responsibility, the row for the first Operating Unit must be uploaded, then you will need to switch responsibilities using the 'About' screen



Link new Account Sites Address to existing Account Site Address

This can be achieved one of two ways:

a) **Using downloaded data**

1. Perform a download via the form or sheet to return the Customer Account that has the Site Account whose address is to be shared.
2. Note the Party Site ID, Party Site Name and Party Site Number are populated (At least one of these must be available for use to share addresses), note the existing Account Site and Operating Unit.

Party Site						Address			Account Site			
Party Site Messages	Party Site ID	Location ID	Party Site Action	Party Site Name	Party Site Number	Country	Address1	City	Account Site Messages	Account Site ID	Account Site Action	Account Site Operating Unit
	774182	65923		New Party Site	80488	New Zealand	1 David Street	Hamilton		23098		Vision Operations

- In Account Site, Enter Create, the Operating Unit to share the address to and any other relevant details.

Account Site			
Account Site Messages	Account Site ID	Account Site Action	Account Site Operating Unit
	23098		Vision Operations
		Create	Vision Construction

- Upload.
- The new Account Site has been created in the different Operating Unit, using the same address as the existing Account Site and an Account Site ID assigned

Account Site			
Account Site Messages	Account Site ID	Account Site Action	Account Site Operating Unit
	23098		Vision Operations
	23099	Create	Vision Construction

- Perform a download using Account Site ID for Operating Unit 2 to confirm that the same address was used.

Party Site						Address			Account Site			
Party Site Messages	Party Site ID	Location ID	Party Site Action	Party Site Name	Party Site Number	Country	Address1	City	Account Site Messages	Account Site ID	Account Site Action	Account Site Operating Unit
	774182	65923		New Party Site	80488	New Zealand	1 David Street	Hamilton		23099		Vision Construction

b) Using manually entered IDs/Data

- If known, enter the Customer ID

Customer									
Customer Messages	Party ID	Customer ID	Customer Action	Party Type	Party Active	Party Name	Party Number	Account Name	Account Number
		348826							

2. If known, enter Party Site ID, Party Site Name and/or Party Site Number are populated.

Party Site					
Party Site Messages	Party Site ID	Location ID	Party Site Action	Party Site Name	Party Site Number
	774182				

3. Notes: At least one of these must be available for use to share addresses
: Party Site ID is the driving column, but this can be derived from the Party Site Name and/or Party Site Number if not known.
4. In Account Site, Enter Create, the Operating Unit to share the address to and any other relevant details.

Account Site			
Account Site Messages	Account Site ID	Account Site Action	Account Site Operating Unit
		Create	Vision Malaysia

5. Upload.
6. The new Account Site has been created in the different Operating Unit, using the same address as the existing Account Site and an Account Site ID assigned.

Account Site			
Account Site Messages	Account Site ID	Account Site Action	Account Site Operating Unit
	23101	Create	Vision Malaysia

7. Perform a download using Account Site ID for Operating Unit 2 to confirm that the same address was used.

Party Site						Address			Account Site			
Party Site Messages	Party Site ID	Location ID	Party Site Action	Party Site Name	Party Site Number	Country	Address1	City	Account Site Messages	Account Site ID	Account Site Action	Account Site Operating Unit
	774182	65923		New Party Site	80488	New Zealand	1 David Street	Hamilton		23101		Vision Malaysia

1.4. Added Site Use Bill To Site Number Column to Site Use Section

Version: 2.2.91

Date: 24/07/18

When creating **Ship To** records to link to a **Bill To** location (for an existing or new site) you can use the 'Site Use Bill To Site Number' column to uniquely identify a location where the address may be duplicated. The 'Site Use Location' can be populated or left blank.

Notes: If using the data entry form, the 'Site Use Bill to Site Number' LOV contains Party Site Number, Location, City and Country as a reference to select the relevant Party Site Number.

[Cobain 12.1.3] Site Use

Site Use | Site Use DFF

Site Use ID:

Site Use Usage: **Ship To**

Site Use Location:

Site Use Bill To Location:

Site Use Payment Terms:

Site Use Active:

Site Use Tax Geo Class:

Site Use Tax Rounding:

Site GL Rec:

Site GL Tax:

Site GL Clearing:

Site GL Unearned:

Site Price List:

Site FOB:

Site Warehouse:

Site Use Upload Mode:

Site Use Original Reference:

Site Use Bill To Site Number:

Site Use Primary	1466	14874	NANTERRE
	58872	17871	
	59262	18261	
Site Use Territory	62660	21661	
	62480	21732	
Site Use Tax Code	62892	21872	Austin
	62891	21874	Austin
Site Use Tax Calculation	64039	22592	Wrong

Site Use Demand Class:

Site GL Rev:

Site GL Freight:

Site GL Unbilled:

Site Order Type:

Site Freight Terms:

Site GSA:

Site Item Identifier Type:

Row # 12

Ok Cancel

four search has retrieved 10 item(s)

If using the sheet, the correct 'Site Use Bill to Site Number' to link to the Ship To will need to be known and entered.

Site Use						
Site Use Messages	Site Use ID	Site Use Action	Site Use Usage	Site Use Location	Site Use Bill To Site Number	Site Use Bill To Location
		Create	Bill To Ship To	Location1	62600	

1.5. Column Headings with '?' Suffixes have been Renamed

Version: 2.2.51

Date: 23/05/18

We have removed the question mark suffixes to ensure users can write their own queries using the 'Custom Query' functionality and return information from these fields into their worksheet.

Changed Columns where the '?' has been removed

- Profile Credit Check?
- Profile Credit Hold?
- Profile Override Terms?
- Profile Allow Discount?
- Profile Send Statement?
- Profile Send Credit Balance?
- Profile Send Letters?
- Profile Consolidate Enabled?
- Profile Charge Interest?
- Profile Compound Interest?

1.6. Site Use GL Codes are not created dynamically during Validation

Version: 2.2.41

Date: 18/05/18

If Dynamic Insertion is enabled for your Accounting Flexfield new GL code combinations will only be created during Upload.

1.7. 'Record Type' Ribbon Option has now been superseded by Templating

Version: 2.2.03

Date: 14/12/2017

Record Type	Customer ▾
Upload Option	Create ▾
Validate Option	Validate and Upload ▾

These are now implemented as Modes. When selecting a template either Customer, Party, or Bank can be used:

[Cobain VIS10 12.1.3] Generate template ×

Select your template and/or mode if appropriate. Click 'OK' to return to your worksheet using your selection. 'Create New Sheet' will close this form creating a new worksheet based on your selection.

Template	<input type="text"/>
Mode	<div style="border: 1px solid gray; padding: 2px;"> Customer Customer Party Banks Create New </div>
<input type="button" value="Ok"/> <input type="button" value="Create New"/> <input type="button" value="Cancel"/>	

Note - The use of Templates is entirely optional.

1.8. 'Upload Option' Ribbon Control has now been superseded by 'Upload Mode' Columns in each Section

Version: 2.2.03

Date: 14/12/2017

Previous Wizard versions – Upload Option ribbon control:

Record Type	Customer
Upload Option	Create
Validate Option	Validate and Upload

New sectional 'Upload Mode' column example:

Customer									
Customer Messages	Party ID	Customer ID	Customer Action	Party Type	Party Active	Party Name	Party Number	Account Name	Account Number
	609331	231767	Update All	Organizati	Active	ABC Corp	127604	Pradesh	38530
	609331	283772	Update	Organizati	Active	DHB	127604	Leeuwarden	39593
	609331	283774	Update	Organizati	Active	Barry's Bike Barn	127604	San Fran	39594
			Create	Organizati	Active	Connie's Classic Cars	127604	Germany	39853
			Create	Organizati	Active	Gary's Gurneys			
			Create All	Organizati	Active	Mary's Makeovers		Timbucktoo	

Now users can perform create and update action on the same upload as a single action.

This gives the user ultimate control over whether the data is to be sent to EBS as new records or updates of existing records.

Note: Previously a section would be uploaded when the relevant 'Status' column was blank. If the 'Status' column was populated with 'Accepted', this value had to be removed before the Wizard

If the relevant 'Upload Mode' column is left blank the Wizard will ignore the entire section for upload. Note it will still be validated.

There are 4 values available as explained below:

- Update – This will update existing EBS values for data in this Wizard layout section only.

- Update All - This will update existing EBS values for data in this Wizard layout section and any related child sections where the 'Upload Mode' has not been populated. Note when using this 'All' option the Wizard will automatically populate 'Update All' in each relevant child section as it undertakes validation.
- Create - This will create new EBS records using the data in this Wizard layout section only.
- Create All - This will create new EBS records using the data in this Wizard layout section and any related child sections where the 'Upload Mode' has not been populated. Note when using this 'All' option the Wizard will automatically populate 'Create All' in each relevant child section as it undertakes validation.

Tip: Use the 'Default Values' row 10 data to populate this with the most commonly used type of upload you are running.

1.9. Use of shared Columns has been removed to minimise layout confusion

Version: not listed

Date: 14/07/2017

Every Wizard Column now relates to a distinct Oracle EBS field.

For example, previously DFF attribute fields at the Customer and Site level were the same columns in the Wizard, differentiated by whether the user was uploading a site row or customer row. Now these columns are separated meaning they are now distinctly identifiable:

Previous layout of Customer DFF Data:

Customers: One to One								Customer DFF			
Main								DFF			
Party Type	Party Number	Party Name	Customer Number	Account Name	Customer Type	Original Reference	Customer Active	DFF Context	DFF Attribute1	DFF Attribute2	DFF Attribute3
Organization	1001	American Telephone & Telegraph	1001 CURRENT	AT&T	External	1001	Active	Customer	Large	Telco	
								Site	Billing		

Previous layout of Site DFF Data:

Customers: One to One								Customer DFF			
Main								DFF			
Party Type	Party Number	Party Name	Customer Number	Account Name	Customer Type	Original Reference	Customer Active	DFF Context	DFF Attribute1	DFF Attribute2	DFF Attribute3
Organization	1001	American Telephone & Telegraph	1001 CURRENT	AT&T	External	1001	Active	Customer	Large	Telco	
								Site	Billing		

New layout of Customer DFF Data:

Customer					Customer DFF				
Party Type	Party Name	Party Number	Account Name	Account Number	Customer Context	Customer Attribute1	Customer Attribute2	Customer Attribute3	Customer Attribute4
Organization	Connie's Classic Cars	127604	Pradesh	38530	Customer Information	DOMESTIC	NONE	STD	CONSIGN

New layout of Site DFF Data:

Account Site				Account Site DFF			
Account Site Messages	Account Site ID	Account Site Action	Account Site Operating Unit	Account Site DFF Context	Account Site DFF Attribute1	Account Site DFF Attribute2	Account Site DFF Attribute3
	20264		XXAOA Andra Pradesh Operations	Context	Attribute1	Attribute2	Attribute3

1.10. Linking Sites to Customer records in the layout no longer requires the use of the Customer Number, Name, or 'CURRENT' value

Version: not listed

Date: not listed

Site level information can now be entered on the same row as the Customer Information. For example, in the previous wizard, if one was uploading 2 customer contacts the site information needed to be added to the next available row after the last contact. Now the Site information can be added on the same line as the customer header.

Previous layout

Customer					Site			Sites: One to One					
Customer Number	Account Name	Customer Type	Original Reference	Customer Active	Cust Site Messages	Cust Site ID	Party Site ID	Main					
								Party Site Number	Party Site Name	Site Location ID	Site Country	Site Address1	Site Address2
1001	American Telephone & Telegraph	External	1001	Active									
2 Blank Header rows as 2 Customer Level contacts exist further to the right in the Wizard sheet layout													
CURRENT									Melrose		United States	11 Fuchsia Avenue	Pukete

'CURRENT' value indicates this Site row is a child record of the above Customer record

New layout:

Customer					Party Site			Address						Account Site		
Customer Action	Party Type	Party Name	Party Number	Account Name	Account Number	Party Site Action	Party Site Name	Party Site Number	Country	Address1	City	Postal Code	State	County	Account Site Action	Account Site Operating Unit
Update All	Organization	Cloud	127604	Pradesh	38530		Classic Holdens	62480	India	1 Kingswood Street						XXAOA Andra Pradesh Operations
							Classic Holdens - US	62892	United States	25 Kingswood Street	Austin	78701	TX	Williamson		XXAOA San Fran Operations

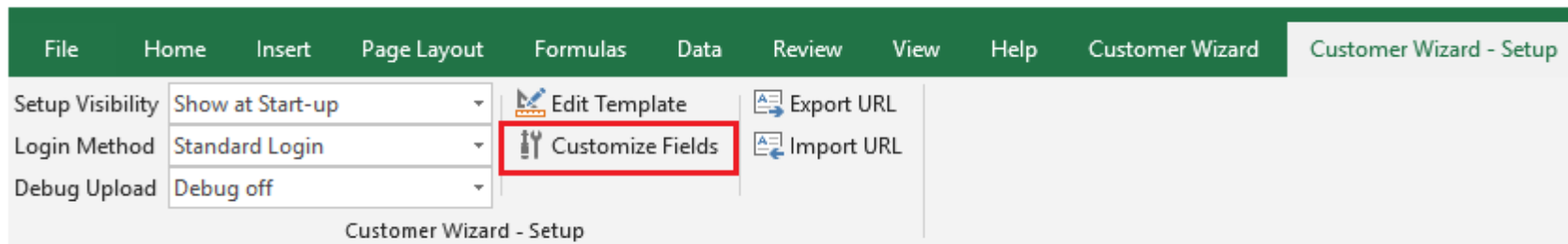
Even though 2 contacts still are to be added at the customer level, the site information can begin on the same row as the customer record.

1.11. 'Customize Fields' is now replaced by Templating

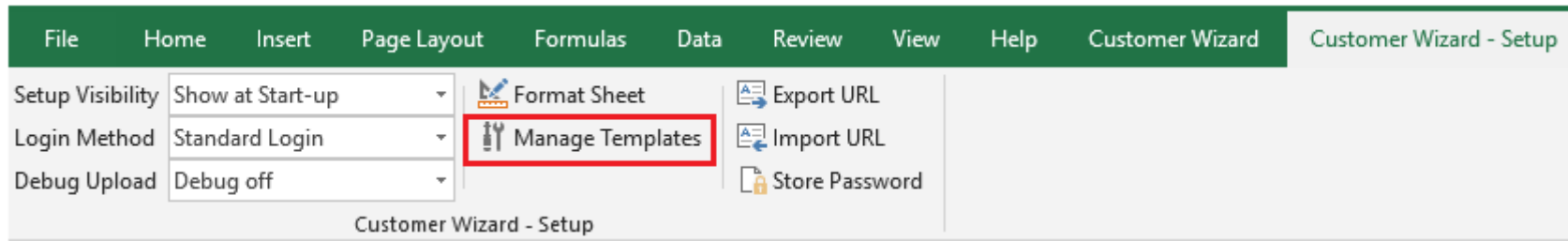
Version: not listed

Date: 11/05/2017

Previous Wizard Ribbon Control to create user's worksheets:

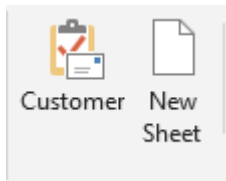


New Wizard Ribbon Control to create user's worksheets:



The 'Manage Templates' gives the following advantages:

- Templates are stored on each instance and can simply be selected by the user in the main ribbon:



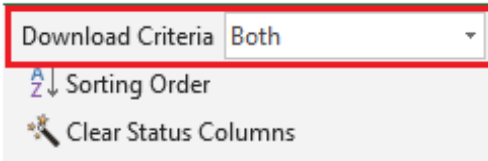
- Templates are secure, preventing users from accessing data they do not have permission to view or change.
- Templates are easily copied from one instance to another.
- Templates are optional, predefined modes can instead be used where users create their own layouts as appropriate.

More information on the configuration and use of More4Apps Templating can be found [here](#).

1.12. Download Criteria Ribbon Option replaced by other options

Version: not listed

Date: not listed



This is now managed through templating – A user can setup a template to just have Customer Account columns, Customer Account Site columns or both. i.e. if the template only has Site data, this is all that will be downloaded.

More information on the configuration and use of More4Apps Templating can be found [here](#).

1.13. New Banks Mode (now split out from Customer Mode)

Version: not listed

Date: not listed

Previously there was the ability to create and assign bank accounts in Customer mode. This has now been split into a new mode called 'Banks'. The parent record in this mode is the Bank Account and this can be assigned to customer(s) on creation.

Banks Mode consists of four sections:

- Bank Account
- Bank Owner
- Bank Assignment
- Debit Authorizations

More information on 'Banks' mode can be found [here](#).

More information on the configuration and use of More4Apps Templating can be found [here](#).