



Customer Wizard

Benefits

- Extremely easy to use
- Configures itself to your system setup
- Close to zero implementation effort
- Easy to customize
- Cuts down data entry time
- Eliminates re-keying errors
- Correct errors quickly and reload in minimal time

Customer Wizard allows you maintain your Oracle customer transactions from Excel. Forget about manual data entry when you can now download customer information into Excel, make the necessary changes using the flexibility of Excel and then upload the changes directly into Oracle Receivables. It is robust, extremely fast and flexible. Use Excel to download your customer information as the basis for new additions or to make changes or to simply populate customer information into Excel for analysis.

Feature Overview

- Based on Microsoft Excel
- Control the entire process from the spreadsheet
- Forms assist with data entry validation and error correction
- Delete errors, correct and reload in minimal time
- No need to log into Oracle Applications
- Ability to download existing site and customers and use this as a basis to create new customers and sites.
- Download existing customer and site details to update this information.

Process Status	Messages	Customer ID	Site ID	Party Type	Party Number	Party Name	Customer Number	Account Name	Customer Type	Customer Tax Registration Num	Customer Taxpayer ID	Dis
LOADED		1002	1090				1005	Hilman and Associates				
LOADED			1093	Organization	1002	Imaging Innovat	1002	Imaging Innovations, Inc.	External		30-63946897	10
LOADED			8100				1002	Imaging Innovations, Inc.				
LOADED			8792				1002	Imaging Innovations, Inc.				
LOADED			8793				1002	Imaging Innovations, Inc.				
LOADED			8794				1002	Imaging Innovations, Inc.				
LOADED			8795				1002	Imaging Innovations, Inc.				
LOADED			8796				1002	Imaging Innovations, Inc.				
LOADED		1003		Organization	1003	United Parcel S	1003	United Parcel Service	External	12345678901	01-83937602	10
LOADED			1097				1003	United Parcel Service				
LOADED			1098				1003	United Parcel Service				
LOADED			8797				1003	United Parcel Service				

Architecture

- Compatible with Microsoft Excel 2000 and later versions
- R11i to R12
- No client install
- Uses Oracle Applications function security

Customize Fields

- The 'Set Wizard Columns' form enables you to quickly select what information to include in the worksheet.
- Mandatory columns are pre-selected. Users can also select other columns as required to be mandatory.
- Sections can be included or excluded from the worksheet as required.

The fields listed below are available to the wizard. If a section is unclicked then no column in that section will be available. The column can also be made mandatory if required by selecting the mandatory checkbox at the end of the column name.

Column	Mandatory
<input checked="" type="checkbox"/> Use Section	
<input checked="" type="checkbox"/> Site Process Status	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Site Messages	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Site ID	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Site Number	<input type="checkbox"/>
<input checked="" type="checkbox"/> Site Name	<input type="checkbox"/>
<input checked="" type="checkbox"/> Site Location	<input type="checkbox"/>
<input checked="" type="checkbox"/> Site Country	<input type="checkbox"/>
<input checked="" type="checkbox"/> Site Address1	<input type="checkbox"/>
<input checked="" type="checkbox"/> Site Address2	<input type="checkbox"/>

Buttons: Ok, Cancel, Create

Transaction Forms

- Data entry forms are available for each data entry section (Customer, Site, Site Use, Communications, Contacts, Contact Communication, Profile Transactions, Profile Documents, Profile Amounts, roles, Responsibilities)
- The transaction forms are available to assist with data-entry and error correction.
- The forms are optional you can also key/paste information directly into the worksheet.
- Lists of Values are validated according to your configuration.

Customer

Customers | Other | Profile | Contacts | Responsibilities | Comms | Relationships

Party Type: [Dropdown] Party Number: [Text]

Party Name: [Text] First Name: [Text]

Middle Name: [Text] Last Name: [Text]

Customer Number: [Text] Account Name: [Text]

Type: [Dropdown] Class: [Dropdown]

Alternate Name: [Text] Prefix: [Dropdown]

Suffix: [Text] Tax Reg Num: [Text]

Taxpayer ID: [Text] Original Reference: [Text]

Active: [Dropdown] Order Type: [Dropdown]

Price List: [Dropdown] Tax Code: [Dropdown]

Friight Terms: [Dropdown] FOB: [Dropdown]

GSA: [Dropdown] Warehouse: [Dropdown]

Buttons: OK, Cancel, DFF

Download Customer

- The download function is very flexible and enables you to select customers or sites using one or more of the filters.
- List of Values and Search capabilities are available for filters.
- The download will populate the spreadsheet with the relevant information for the customer.
- The customer information can be subsequently updated and loaded back into Oracle.
- The download function enables efficient maintenance and/or creation of customers.

Example Worksheet

Below is an example of the Customer Wizard worksheet. This example shows existing customers being updated.

The status columns enable the user to quickly see the progress of the records. You can see that seven rows have been successfully loaded and two have been rejected. The rejected rows can be quickly corrected and re loaded.

More4Apps Customer Wizard												
Upload Status				Customers: One to One					Site		Sites: One to One	
Status				Main							Main	
Customer Process Status	Site Process Status	Customer	Customer	Party Type	Party Number	Party Name	Customer Number	Account Name	Customer Type	Site Mess	Site ID	Site Number
LOADED	REJECTED		79075	Organization	784521578	ABC Corporation	5068	ABC Corporation	External			
	REJECTED						Current	ABC Corporation				
							Current	ABC Corporation				
LOADED			79076	Organization	784521579	ABC Corporation	5069		External			
	LOADED						Current			8894		18814
	LOADED						Current			8895		18815
LOADED			79077	Organization	784521576	ABC Corporation	5070		External			
	LOADED						Current	ABC Corporation		8896		18816
	LOADED						Current	ABC Corporation		8897		18817

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