

CDX – First Steps Guide

SET-UP OF AN ORGANIZATIONAL STRUCTURE IN CDX

An arrangement of companies in organizational units is practical, especially for large companies, so that information can directly be assigned to the right contact person. The set-up of org units can follow an arbitrary organizational structure. Typical scenarios might be geographic org units (region, country, state, plant) or functional org units (electronics, sensors, aftermarket).

Only company administrators are allowed to create org units. From the menu item “Administration > Company”, select your company and view the details. Click with the right mouse button on your company name and select Add Org unit.

The screenshot shows the CDX web application interface. On the left, a tree view shows the organizational structure with 'CDX Service Team (Germany)' selected. A context menu is open over this entry, with 'Add Org Unit' highlighted. The main area displays the 'Org Unit' form with the following fields and values:

Name	CDX Service Team (Germany)*	Zip Code	65428	Mailbox	
Company ID	0	City	Rüsselsheim	Country	Germany
DUNS Number	07-781-7617	State / Province		Expiry Range	365
Bosh Supplier No.	tester	Street	Eisenstraße 56		
Supplyon SPIN ID					

All org units must have a meaningful name and all other necessary information should be filled completely, if possible. Every org unit gets a unique ID, comparable to the company ID. This ID can be used for receipt of MDSs/CMDs directly from suppliers or for sending directly to the customer – similar to company IDs. An org unit can be used only after one or more users are assigned to the unit. It is also possible to assign multiple org units to one user.

➔ Detailed instructions on how to add and erase users from org units can be found in the CDX User Manual chapter „Administration Menu > User > Assigning Org Unit to a User ID “.

Sending and receiving MDSs as org unit of a company

If you would like to send an MDS to a specific org unit of a company, you must deactivate “only root companies” in the search mask “add recipient”. Then all org units show up in the dashboard at the bottom.

In the recipient company, only users assigned to this org unit will see the received MDS in their inbox. When a user accepts the MDS, it becomes visible for the whole company (all org units).

➔ **Detailed instructions for sending and receiving MDSs as org unit can be found in the CDX User Manual chapters „Outbox“ and „Inbox“.**

The CDX license model is oriented on the number of registered suppliers from which your company receives material data sheets. Many times a company sources products (parts) from many different org units of the same supplier. A big benefit of the arrangement of a company in org units in CDX is that, for sent and accepted supplier MDSs of different org units of the same company, the CDX systems calculates only one registered supplier.

USEFUL INFORMATION

CDX Website and Additional Services and Tools

www.cdssystem.com

Contact:

CDX Service Desk

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