



QAD Enterprise Applications
Enterprise Edition

Training Guide Supplier Schedules

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QAD 2011.1 Enterprise Edition
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Workspace: 10USA > 10USACO
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QAD Inc.

100 Innovation Place
Santa Barbara, California 93108
Phone (805) 566-6000
<http://www.qad.com>

Contents

What's New?	vii
About This Course	1
Course Description	2
QAD Web Resources	3
Chapter 1 Introduction to Supplier Schedules.....	5
Course Overview	6
Supplier Schedules	7
Scheduled Order	8
Key Events	10
Terminology	11
Outgoing Process Flow	13
Incoming Process Flow	14
Course Objectives	15
Chapter 2 Business Considerations	17
Tracking - Cumulative	20
Tracking Terminology	22
EDI EDI eCommerce	23
Price List Maintenance (1.10.1.1)	25
Planning Horizons	26
Evaluated Receipts Settlement (ERS)	27
Review	29
Chapter 3 Set Up Supplier Schedules.....	31
Supplier Schedule Business Process	33
Item Records	34
Item Master Maintenance (1.4.1)	35
Exercise: Item Record	36
Supplier Item Maintenance	37
Specification Frames	38
Exercise: Supplier Item	39
Supplier Records	40

Supplier Address and Data Frames	41
Supplier Pricing Data Frame	42
Supplier Terms Data Frame	43
Supplier Primary and Remit-To Addresses	44
Supplier Calendars	45
Supplier Calendar Maintenance (5.5.1.1)	46
Exercise: Supplier Calendar	47
Scheduled Orders	48
Supplier Scheduled Order Maintenance (5.5.1.13)	49
Tax Data Frame	50
ERS Options in Order Header	51
Line Item Frame	52
First Order Line Item Data Frame	53
ERS Options in Order Line Item	54
Second Order Line Item Data Frame	55
Schedule Bucketing	56
Exercise: Creating Demand and Scheduled Orders	56
MRP%	58
Scheduled Order MRP% Maintenance (5.5.1.17)	59
Exercise: Calculating Percentage	59
 Chapter 4 Process Supplier Schedules	61
Supplier Schedules Setup	63
Create Schedule Release	64
Schedule Update from MRP (5.5.3.1)	65
Calculating the Schedule Release	66
Planning Horizons - Firm Days	68
Exercise: Create Schedule Release	70
Review/Modify Schedule Release	71
Schedule Maintenance (5.5.3.3)	72
Schedule Detail Data Frame	73
Resource Authorization Data Frame	74
Exercise: Review Schedule Release	75
Transmit Schedule Release	76
Schedule Print (5.5.3.8)	77
Exercise: Print Schedule Release	78
Schedule Print in Fax Format	79
Supplier Schedule Export	80
Supplier Shipping Schedule (35.4.8)	81
 Chapter 5 Supplier Schedules Receipt Processing	83
Import ASN	87

Document Import (35.1)	88
Create or Verify Shipper	89
PO Shipper Maintenance (5.5.5.5)	90
Contents (Items) Frame	91
PO Container Maintenance (5.5.5.4)	92
Exercise: Receiving the Supplier Schedule	93
Receive Shipper	94
PO Shipper Receipt (5.5.5.11)	95
Exercise: Receive Shipper	95
Direct Receipt	96
Purchase Order Receipts (5.13.1)	97
Line Item Detail Frame	98
Trailer Frame	99
Supplier Setup Summary	100
Course Overview	101
Chapter 6 Special Processes.....	103
Managing Cumulative Quantities	104
Cumulative Received Maintenance (5.5.5.13)	105
Cumulative Received Reset to Zero (5.5.5.14)	106
Appendix A Workshops and Study Questions	107
Supplier Schedules Setup Workshop	108
Supplier Schedules Setup Study Questions	109
Processing Supplier Schedules Workshop	109
Scheduled Order Processing Study Questions	110
Receiving Supplier Schedules Workshop	110
Receiving Supplier Schedules Study Questions	110
Supplier Schedules Setup Workshop: Answers	110
Supplier Schedules Setup Study Questions: Answers	111
Processing Supplier Schedules Workshop	111
Scheduled Order Processing Study Questions: Answers	112
Receiving Supplier Schedules Workshop: Answers	112
Receiving Supplier Schedules Study Questions: Answers	112
Appendix B Reports, Inquiries, Browsers.....	113
Supplier Schedules Inquiries and Browsers	114
Supplier Schedule Reports	115

What's New?

The following table summarizes significant differences between this document and the last published version.

[illegible]

About This Course

Course Description

QAD designed this course to cover the basics of the supplier schedules functionality of QAD Enterprise Applications. This course includes:

- An introduction to supplier schedules
- An overview of key business considerations
- Setting up supplier schedules
- Operating supplier schedules
- Activities and exercises throughout the course
 - Students practice key concepts and processes in supplier schedules

Course Objectives

By the end of this class, students will:

- Analyze key business decisions before setting up supplier schedules
- Set up and operate supplier schedules

Audience

- Implementation consultants
- Members of implementation teams
- Operators
- Information Systems (IS staff who support the EDI EDI eCommerce interfaces)

Prerequisites

- Basic knowledge of:
 - Hardware and network configurations
 - QAD Enterprise Applications as it is used in the business
- Working knowledge of the manufacturing industry in general

Note Students unfamiliar with QAD Enterprise Applications should work through the User Interface Guide before attending this class.

Course Credit and Scheduling

This course is designed to take 2 days

Virtual Environment Information

The hands-on exercises in this book should be used with the Enterprise Edition 2011.1 r01 - Training environment, in the 10USA > 10USACO workspace.

QAD Web Resources

The QAD website provides product and company overviews.

<http://www.qad.com/>

From QAD's main site, you can access QAD's Learning or Support sites.

Chapter 1

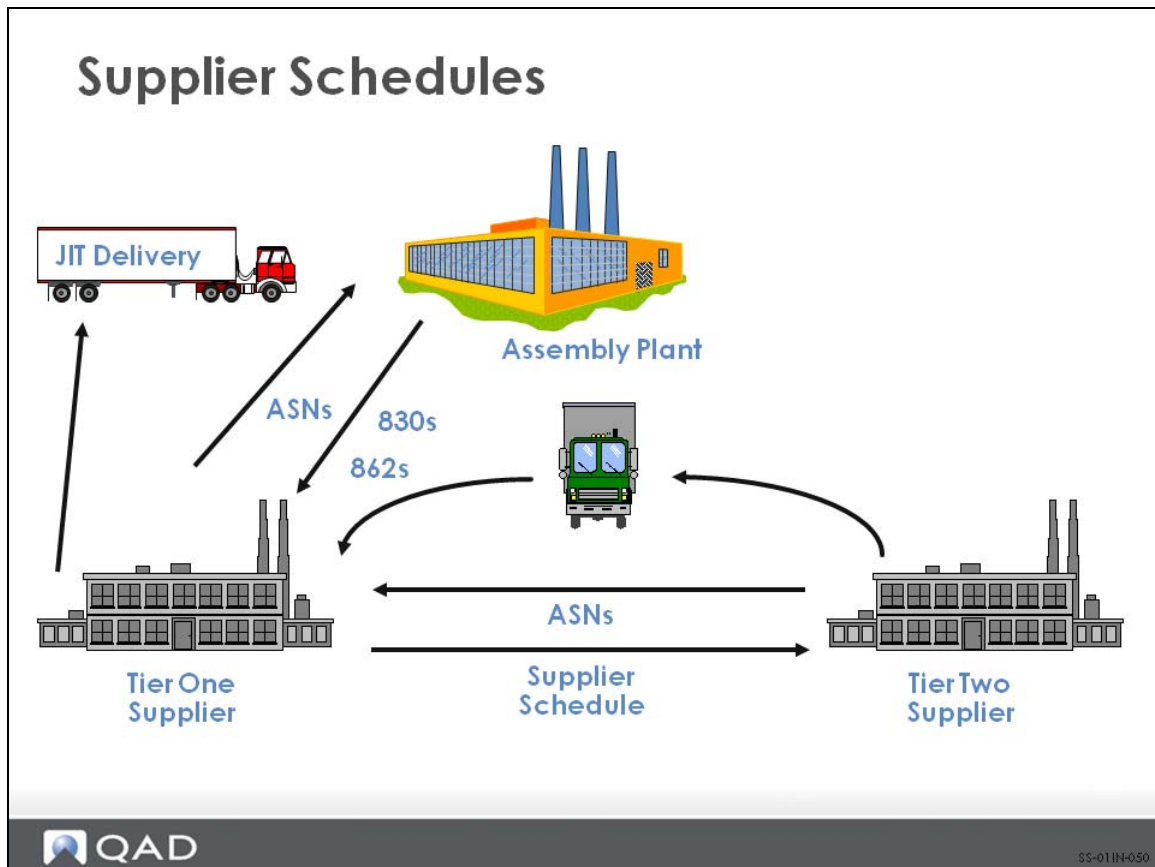
Introduction to Supplier Schedules

Course Overview

Course Overview

- Introduction to Supplier Schedules
- Business Considerations
- Set up Supplier Schedules
- Process Supplier Schedules
- Process Supplier Schedules Receipts

Supplier Schedules



Supplier schedules are period-oriented schedules that are generated on a daily, weekly, or monthly basis. They have their roots in practices developed by the automotive industry.

- The automotive industry requires the communication of releases and the sending of Advance Ship Notices (ASNs).

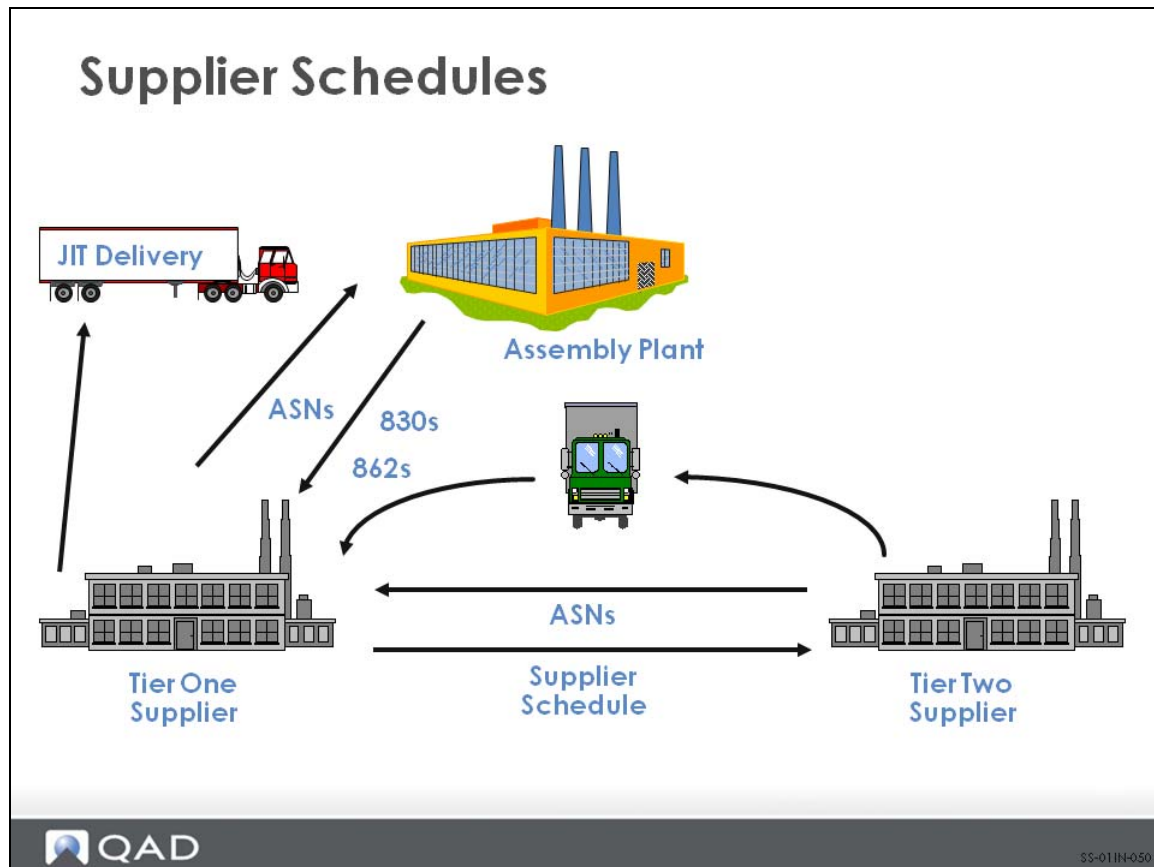
Note Some companies pay only from the ASN.

- Supplier schedules allow automotive companies to maintain an uninterrupted flow of work through manufacturing, while maintaining minimum levels of inventory.

Companies using supplier scheduling share a common profile:

- High production volumes
- Long term commitments with suppliers
- Frequent shipments from suppliers
- Normally use EDI (Electronic Data Interchange)—in QAD Enterprise Applications, the EDI eCommerce module

Scheduled Order



When a scheduled order is created, several parameters are defined that the system uses to calculate receipt, planning, and shipping schedules for the items to be purchased. These items are entered on separate order lines. A scheduled order combines fields found on a purchase order header with order trailer fields and specific line item information. This information forms the structural base against which item quantities and dates are scheduled.

Order Data

The order data applies to the entire order. There are two sections. The first section identifies the purchase order and supplier.

Note The purchase order number can be system or user-assigned.

The second section is the Order Data frame. This frame contains the shipping and credit information, and how to transmit the order to the supplier (fax, EDI). You can also enter comments for the entire order.

Order Line Item Data

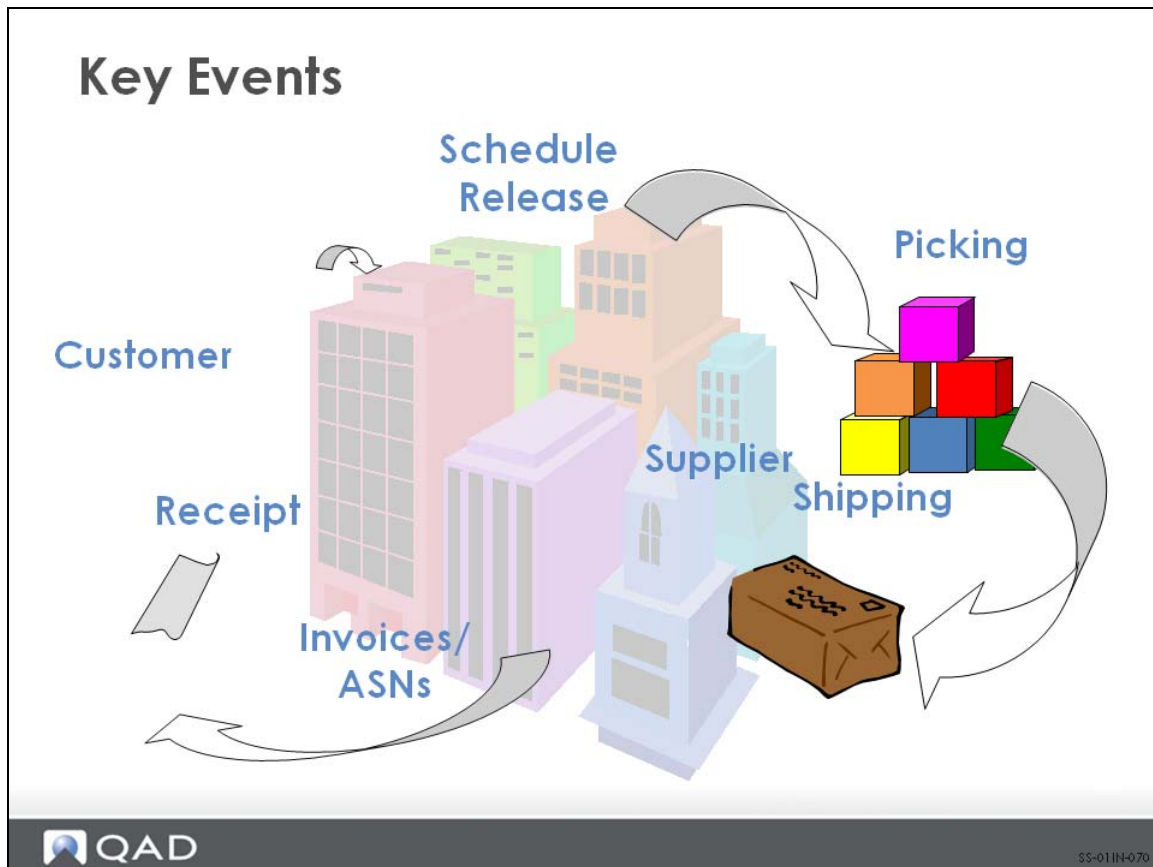
After completing the order data, enter the specific order line item data, using the Order Line Item data frames. For each line item enter information such as:

- Item number for the item being purchased
- Site receiving the purchased item

- Line item details
- Schedule details

You can also enter comments.

Key Events



- 1 The customer determines what they need and when they need it.
- 2 Supplier runs Material Requirements Planning (MRP).
- 3 Creates a scheduled order.
- 4 Schedule release sent to supplier.
- 5 Order items are picked.
- 6 Order is shipped.
- 7 Customer receives order.

Terminology

Terminology

- Advanced Ship Notice (ASN)
- Electronic Data Interchange (EDI)
- EDI ECommerce
- Fabrication/Raw Material Authorization
- Release
- Scheduled Order



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Advance Ship Notice (ASN)

An electronic document derived from a shipper document and sent by a supplier to a customer when a shipment leaves the supplier site, informing the customer that the shipment is on the way. ASN formats are defined for various international standards; for example, an 856 Transaction Set per ANSI ASC X12. An ASN takes the place of an invoice in some supplier-customer arrangements.

Electronic Data Interchange (EDI)

An international protocol for electronically transmitting documents such as customer schedules, invoices, and ASNs between trading partners.

EDI eCommerce

The EDI component of QAD Enterprise Applications.

Fabrication Authorization

Communication with a customer to a supplier authorizing them to fabricate items through a specified time period. Acts as the customer's agreement to pay for all items fabricated within the authorization horizon.

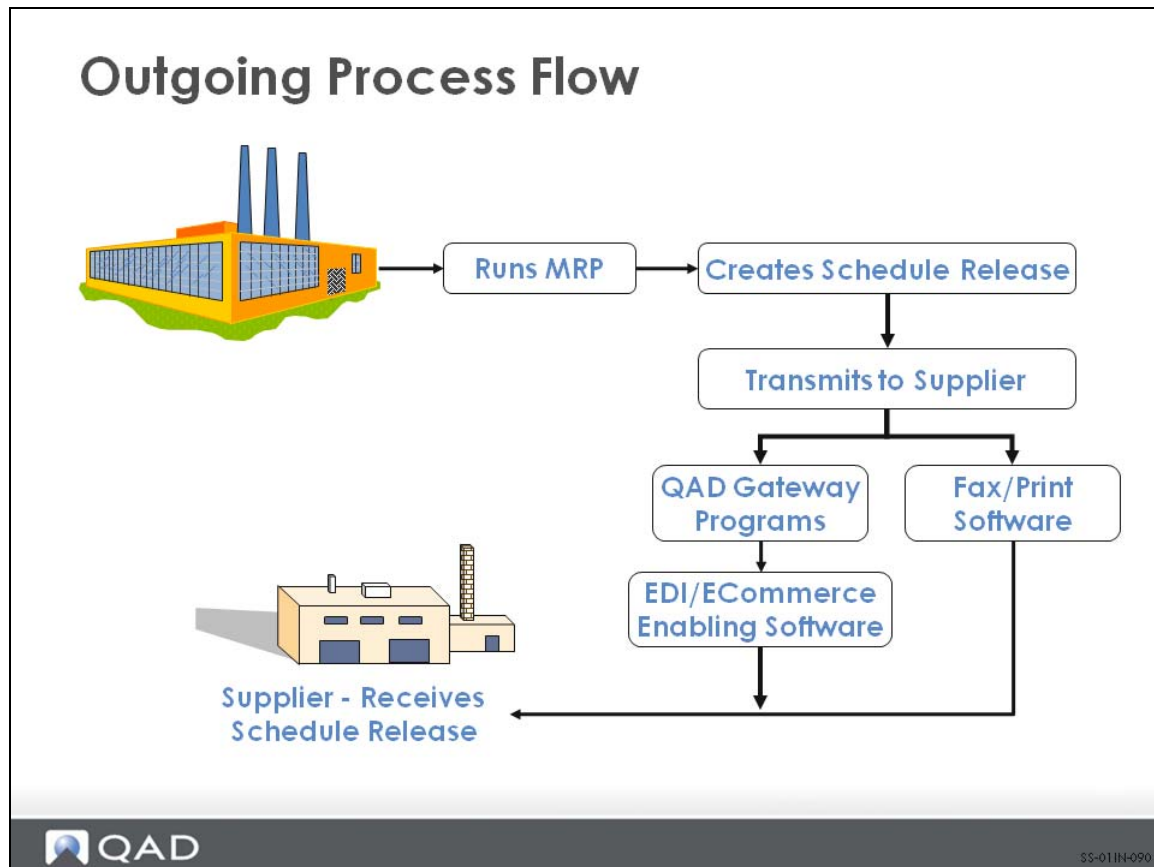
Release

A schedule based on a scheduled order.

Scheduled order

A specialized sales or purchase order that has schedules attached to it for the suppliers to ship against. The scheduled order can have an indefinite term. The scheduled order serves as the basis for creating the customer and supplier schedules.

Outgoing Process Flow



Supplier schedules allow you to manage the relationships with suppliers to whom you transmit period-oriented demand with statements called releases.

- Releases are typically sent using EDI or eCommerce
- Releases can be sent by fax or a printed release

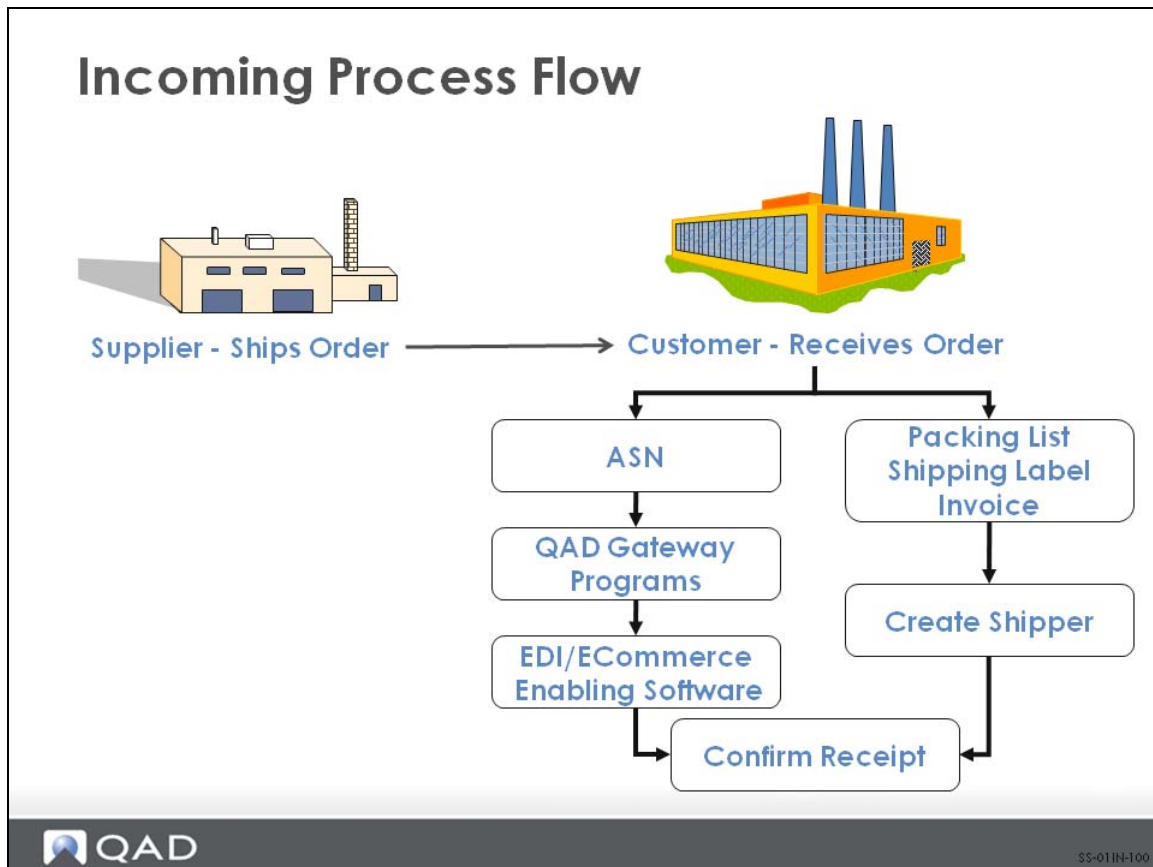
With EDI eCommerce:

- Release information is taken from the QAD Enterprise Applications supplier schedules
- Mapped through the QAD Enterprise Applications gateway programs into EDI eCommerce readable messages
- EDI-enabling software is used to export the releases to a supplier's computer or electronic mailbox
 - Each supplier may have their own EDI requirements and signal standards
 - Handled by the EDI-enabling software after the information is passed from QAD Enterprise Applications

Without EDI eCommerce:

- Schedule releases can be printed and faxed, or a fax server used for transmission
- Can be printed and sent

Incoming Process Flow



With EDI eCommerce

- Often occurs when there is a significant transportation lead time involved, or
- If the supply chain has recognized the advantage of single keying of dispatches/receipts

ASNs reduce the need for expediting at the customer end by providing visibility while the goods are still in transit.

Note If you are using EDI eCommerce, an ASN merely needs to be received for items and quantities to make a receipt, rather than keying in all the details again.

Without EDI eCommerce

- Create a shipper
- Receive the shipper

Course Objectives

Course Objectives

In this class you learn how to:

- Identify key business considerations before setting up Supplier Schedules in QAD Enterprise Applications
- Set up Supplier Schedules in QAD Enterprise Applications
- Process Supplier Schedules in QAD Enterprise Applications
- Process Supplier Schedules Receipts in QAD Enterprise Applications



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Chapter 2

Business Considerations

Business Considerations

In this section you learn how to:

- **Identify key business considerations before setting up Supplier Schedules in QAD Enterprise Applications**
- Set up Supplier Schedules in QAD Enterprise Applications
- Process Supplier Schedules in QAD Enterprise Applications
- Process Supplier Schedules Receipts in QAD Enterprise Applications



SS-BU-010

Business Considerations

- Tracking
- EDI/EDI ECommerce
- Price Lists
- Planning Horizon
- Evaluated Receipts Settlement (ERS)

Tracking - Cumulative

Tracking – Cumulative

Period	1	2	3	4	5	6
Net Demand	1,000	1,000	1,000	1,000	1,000	1,000
Cumulative	1,000	2,000	3,000	4,000	5,000	6,000
	Cum Start					
Cum shipped = 2,500						
Net Required Qty.	0	0	500	1,000	1,000	1,000

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Definition

Accounting method in which trading partners maintain totals of required and shipped/received quantities. There are two methods:

- Cumulative
- Non-Cumulative (i.e., based on net requirements)

Cumulative accounting maintains running totals for each shipped/received quantity. Non-cumulative accounting methods are calculated from discrete quantities and are adjusted using the cumulative quantity required less the cumulative quantity received or shipped.

Why Consider?

- Traditionally, schedules in the automotive industry have been based on cumulative accounting
 - Total schedule quantity determined for a period, often a year
 - Effect of each shipment to a customer was calculated based on a cumulative total
- Today many business environments use release management to ship against specific requirements:

Functionality in QAD Enterprise Applications

- Monitor received/shipped quantities

- Quantities can be adjusted

Setup Implications

- Supplier Scheduled Order Maintenance (5.5.1.13) needs to be set up to reflect when quantities begin to accumulate
- Agreed upon between you and your supplier

Tracking Terminology

Tracking Terminology

- Cum Received
- Cum Required
- Cum Shipped
- Cum Start Date
- Cumulative Accounting
- Prior Cum Date
- Prior Cum Required



SS-BU-040

cum required

The gross cumulative quantity on order at any point in a customer schedule.

cum shipped

The cumulative total shipped by the supplier.

cum start date

The date a scheduled order shipment began accumulating quantities.

cumulative accounting

A method of tracking shipments and receipts in which trading partners maintain running totals of required and shipped/received quantities.

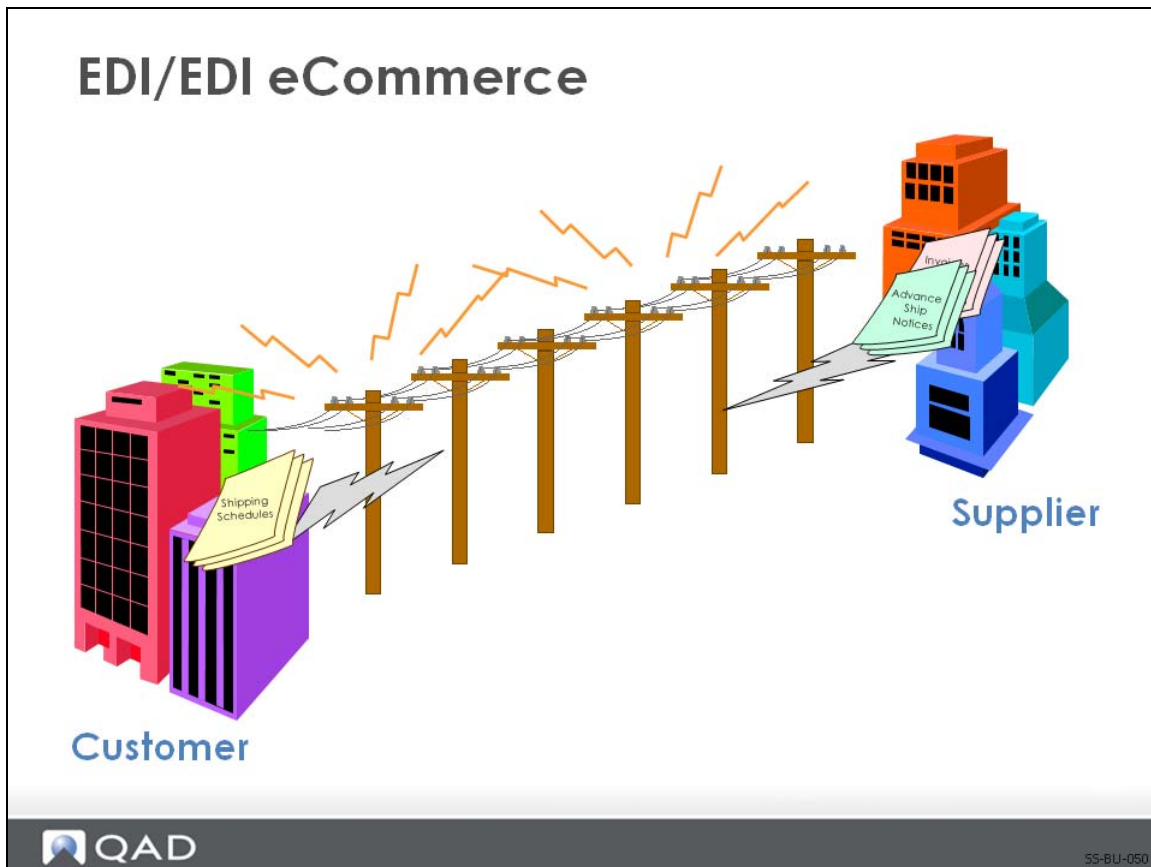
prior cum date

The up to and through date of a prior cumulative required quantity.

prior cum required

The total quantity required prior to the date of release.

EDI EDI eCommerce



Definition of EDI

An international protocol defining the means and methods for electronic transmission of documents between trading partners. Documents are transmitted in a highly structured format that can be processed by computer software.

Definition of eCommerce

ECommerce is the interface between QAD Enterprise Applications and third-party EDI communications or translator products called EC subsystems. ECommerce enhances the system's ability to manipulate, analyze, edit, and reprocess EDI data.

Why Consider?

- Time saving
 - Information processed faster
 - Shortened response times
- Reduced data input
 - Reduces errors
- Saves labor costs
 - Reduces/eliminates paperwork, fewer people are needed
- Lower inventory levels

Functionality in QAD Enterprise Applications

- Support import of ASNs (856) and invoices (810)
- Support export of schedule releases (830)

Setup Implications

- EDI eCommerce software, files, etc., need to be setup
- Modify user-edited programs to meet trading partner requirements
- Trading Partner Parameters Maintenance (35.13.10) needs to be set up
- Supplier Data Maintenance (2.3.1) needs to be set up with supplier information
- Supplier Item Maintenance (1.19) needs to be set up with supplier item cross-references
- Document Import (35.1) recognizes the supplier item number on the imported document and converts it to your internal item

Price List Maintenance (1.10.1.1)

Price List Maintenance

Price List Maintenance X

Go To Actions Copy Print Preview Attach

Currency: USD Unit of Measure:

Price List: 10AUT01

Customer/Analysis Code: All

Item/Analysis Code: All

Currency: USD Item Data

Unit of Measure: Price:

Start: GL Cost:

Expire Date: Site: Stock UM:

Description:

Amount Type: Discount %

Quantity Type: Quantity

Comb Type: Combinable

Minimum Order: 0.00

Max Quantity: 0.0

Break Cat:

Config Disc: ☐

Manual: ☐

Max Orders: 0

Disc Sequence: 10.0

Print: ☒

Promotion Type:

Promotion:

Cost Set:

Comments: ☐

Back Next

QAD SS-BU-060

A convenient tool for inputting item prices for suppliers without having to perpetually maintain the scheduled order.

Note Scheduled order references a price list

Functionality in QAD Enterprise Applications

- The price list is maintained separately

Note Allows other departments to maintain prices, without having to access the scheduled order line.

- Each item needs to be input on the price list with its relevant price

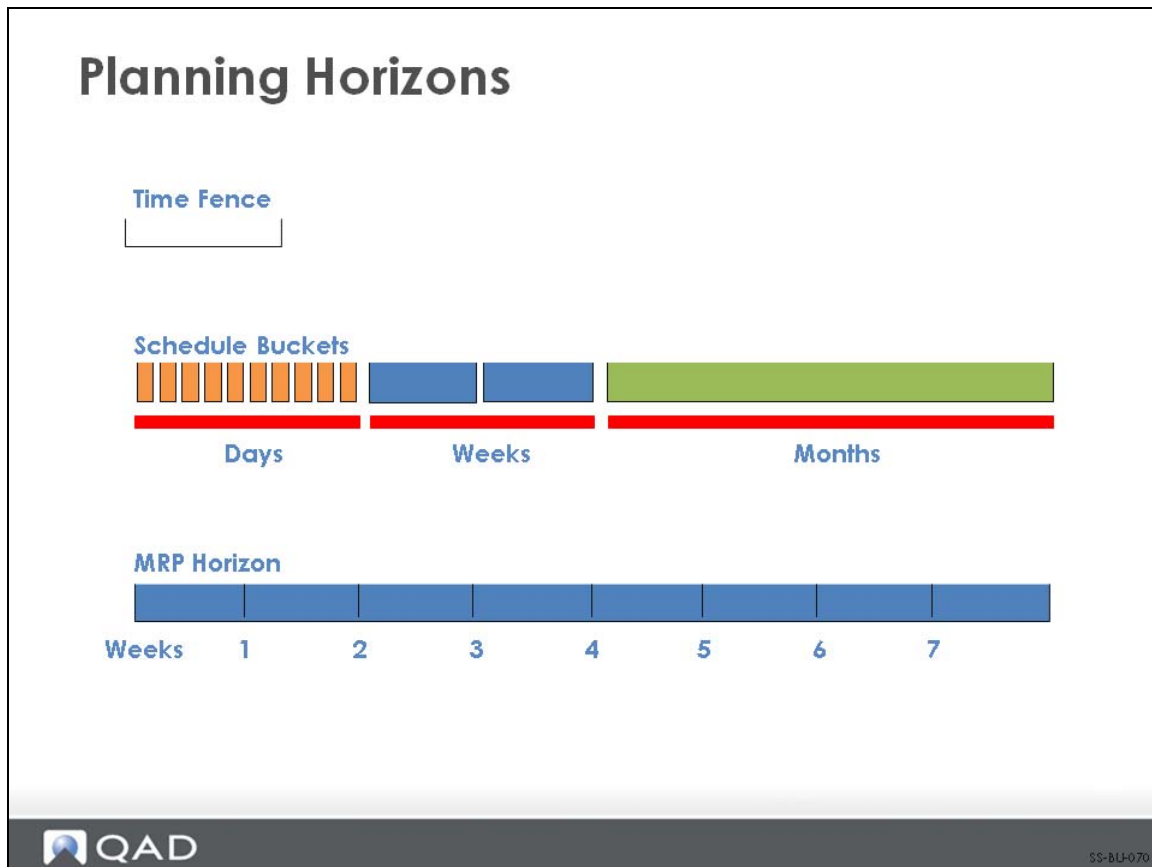
Setup Implications

- Price lists need to be set up in Price List Maintenance (1.10.2.1)

Note Amount type must be set to P (Price) to be used with supplier schedules.

- Scheduled Order Maintenance (5.5.1.13) needs to be set up to reflect the price list
- Supplier Maintenance (2.3.1) can be set up to reflect a price list for a particular supplier

Planning Horizons



Definition

A period, in calendar days, over which MRP is to plan. MRP processes material requirements only within this horizon.

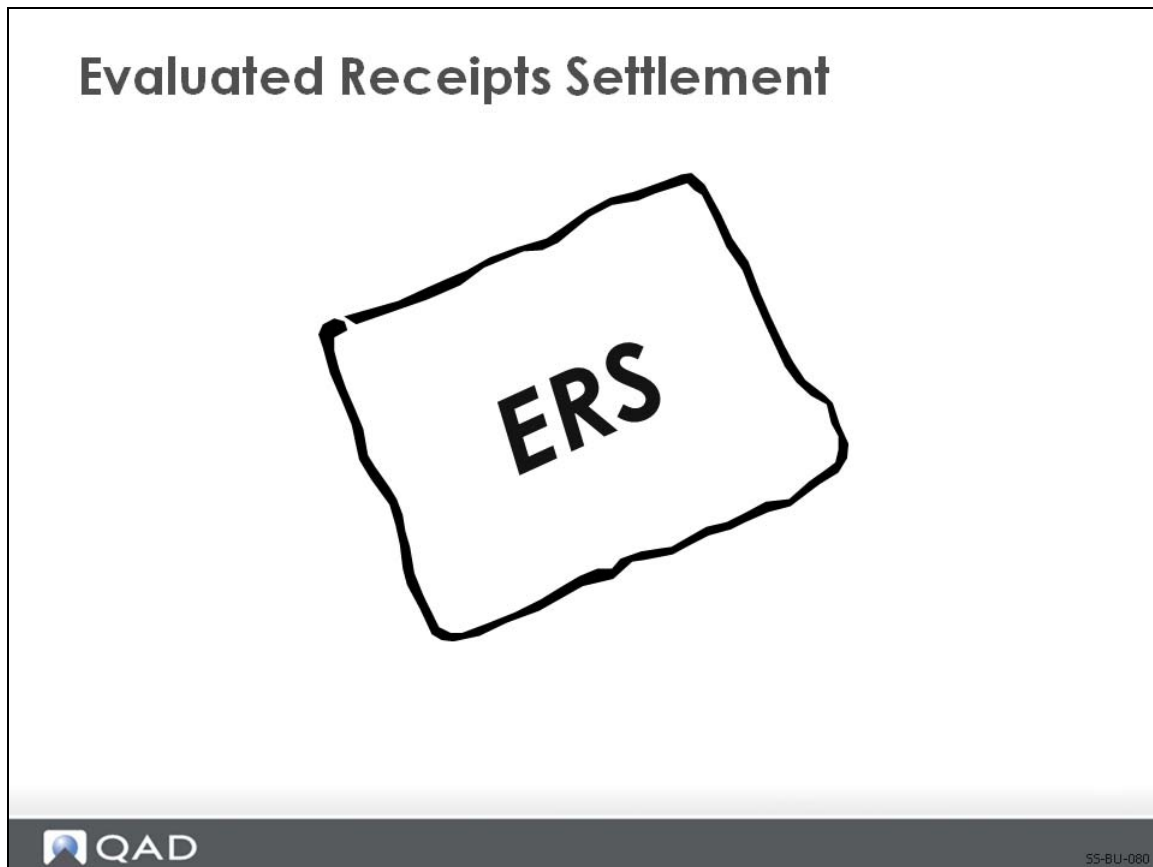
The planning horizon determines how MRP plans or replans orders which are to be included in the scheduled release. It plans requirements only within its planning horizon.

Functionality in QAD Enterprise Applications

Planning horizon parameters are used by the system to generate the schedule. The schedule is seen by your supplier.

Note Supplier Scheduled Order Maintenance (5.5.1.13) needs to be set up to reflect the planning parameters for the scheduled order.

Evaluated Receipts Settlement (ERS)



Definition

ERS enables you to record a pending payment to a supplier without a supplier invoice. Liabilities to the supplier are recorded automatically, based on quantities received at the unit price established by you and the supplier in scheduled order agreements.

Why Consider?

ERS offers the following benefits:

- Reduced clerical workload and costs
- Fewer lost and duplicate invoices
- Fewer discrepancies between invoices and receiving data
- Earlier availability to customer of actual cost data
- Reduced need for customer to accrue unaudited liabilities
- Reduced forms, mailing, and data transmission cost to supplier

Functionality in QAD Enterprise Applications

ERS processing takes place when the shipper is received.

Setup Implications:

- Run ERS Conversion

- Creates records for every site and supplier in the current database
- Enable functionality and set ERS fields in ERS Control (28.10.24)
 - ERS Packing Slip Error
 - Update GL Average Cost
 - ERS Invoice Date Option
 - ERS Options
- ERS Maintenance (28.10.1)
 - Turns ERS processing on for supplier, site, and/or item
- Supplier Scheduled Order Maintenance (5.5.1.13)
 - Set ERS options at order level and at line item level

Review

Review

- Processes and Procedures
- Reporting Requirements
- Customer Expectations
- Product Configuration

Chapter 3

Set Up Supplier Schedules

Set up Supplier Schedules

In this section you learn how to:

- ✓ Identify key business considerations before setting up Supplier Schedules in QAD Enterprise Applications
- **Set up Supplier Schedules in QAD Enterprise Applications**
- Process Supplier Schedules in QAD Enterprise Applications
- Process Supplier Schedules Receipts in QAD Enterprise Applications

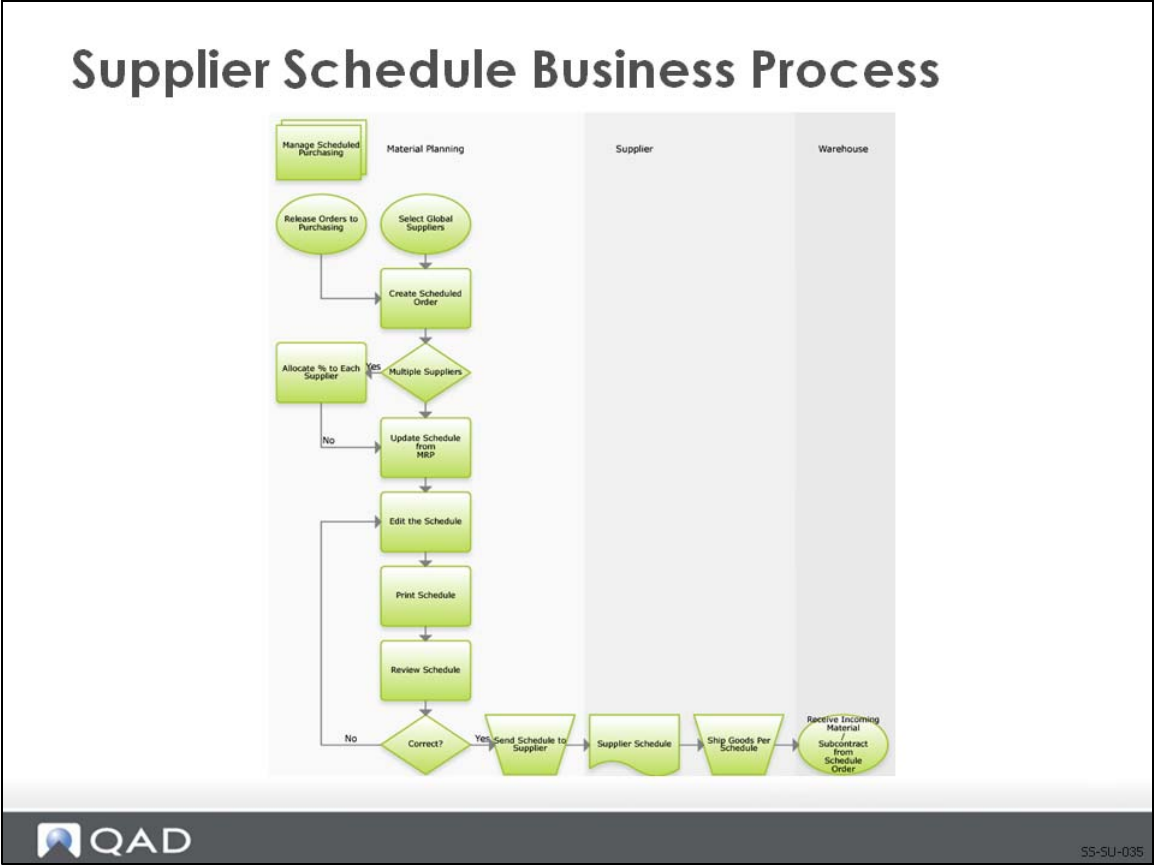


SS-SU-010

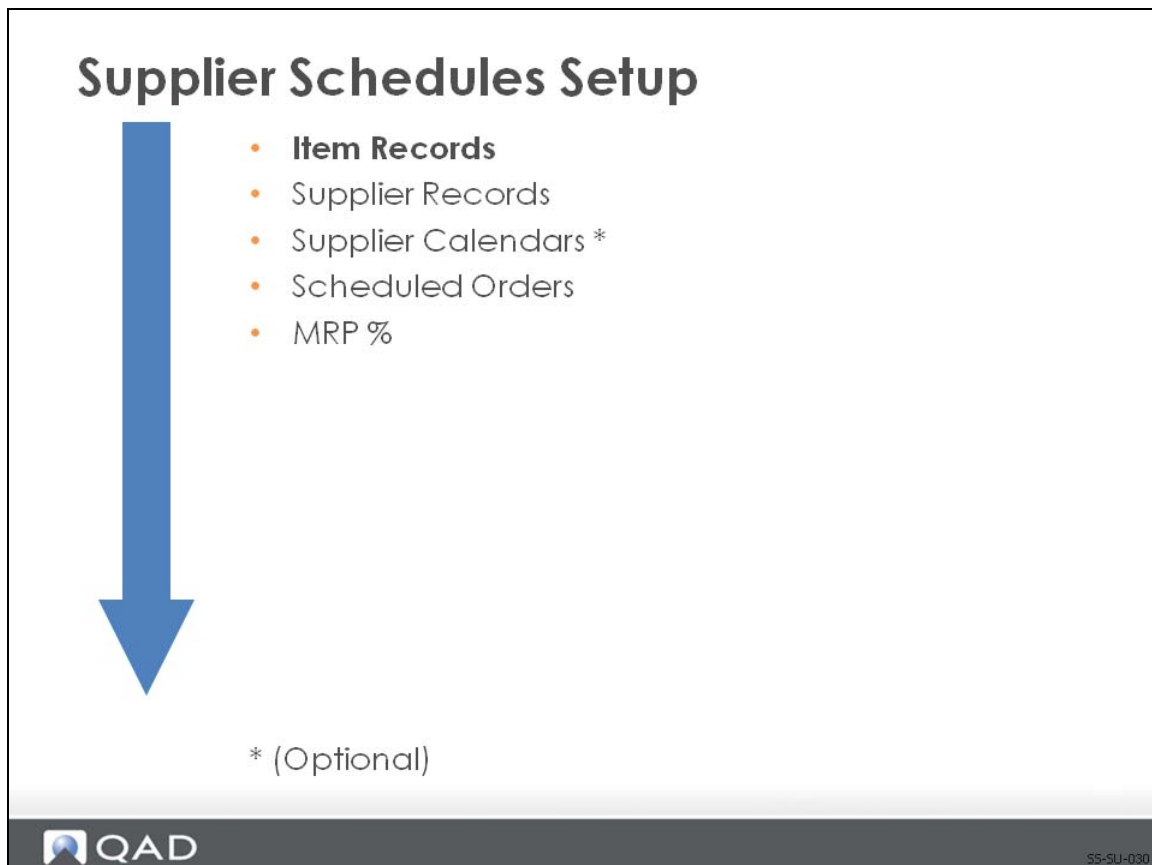
- Item Records
- Supplier Records
- Supplier Calendars (optional)
- Scheduled Orders
- MRP%

This illustration is a suggested setup sequence of master records for supplier schedules, which is based on information that flows from one master record to another and prerequisites that need to be accomplished before setting up a record.

Supplier Schedule Business Process



Item Records



Before creating a scheduled order, item records must exist for all items and products you are purchasing. The Item Master table contains records for all items, regardless of site. Item records hold the default information about items.

MRP uses the item information to create planned purchase orders for scheduled items.

To add item records, use one of the following:

- Item Master Maintenance (1.4.1)
- Item Data Maintenance (1.4.3)

Supplier Item Records

If your supplier uses an item number different from your internal item number, you can set up a cross-reference between the two item numbers. You can also reference the original manufacturer's number.

To add a cross-reference between a supplier item number and your internal item number, use Supplier Item Maintenance (1.19)

Item Master Maintenance (1.4.1)

Item Master Maintenance

Item Master Maintenance
Go To Actions Copy Print Preview Attach

Item: 02001
Item Number: 02001 (2)
Description: Automotive Connector

Item Planning Price

Item Item Data Inventory Item Shipping Data

Item Number: 02001
Description: Automotive Connector
Unit of Measure: BX

Item Data

Prod Line: 10
Added: 3/4/2005
Design Group: PRODMGMT
Promo Group:

Item Type: FINGOOD
Status: ACTIVE
Group:

Drawing:
Revision:
Drawing Loc:
Price Break Category:
Size:

Item Inventory Data

ABC Class: B
Lot/Serial Control:
Site: 10-200
Location: 010
Location Type:
Auto Lot Numbers:
Lot Group:
Article Number:

Average Interval: 90
Cycle Count Interval: 120
Shell Life:
Allocate Single Lot:
Key Item:
PO Receipt Status:
W/O Receipt Status:

Active:
Active:
Memo Order Type:

Delete Back Next


SS-SU-040

Use Item Master Maintenance (1.4.1) to add an item number.

There are four categories of item information (data):

- General
- Inventory
- Planning
- Cost

Exercise: Item Record

Note The data used in these exercises may not be the same as the data shown in the screen captures in this lesson. In an exercise, if a field is not listed, you can accept the default value or leave it blank.

You are going to create a purchase part (item) number.

Use Item Master Maintenance (1.4.1)

- 1 To create the purchased item, enter the following:

Field	Data
Item Number	bx-0001
Description	Carton, 1g

- 2 Advance to the Item Data frame. Enter the following:

Field	Data
Product Line	10
Promo Group	MEDICAL
Item Type	COMP
Status	ACTIVE

- 3 Advance to the Item Inventory Data frame. Enter the following:

Field	Data
Location	100

Record the default site: _____

- 4 Advance to the Item Planning Data frame and enter the following:

Field	Data
Plan Orders	Y
Pur/Mfg	P
Pur LT	1

- 5 Advance to the Item Price Data frame. Enter the following:

Field	Data
Price	25

Supplier Item Maintenance

Supplier Item Maintenance: Specification Frame

Supplier Item Maintenance

Item Number: 02001 [2] Supplier: 10-300 Supplier Item: AUT-10005

Automotive Connector
QMI -USA Division

Item Number: 02001
Supplier: 10-300
Supplier Item: AUT-10005

Unit of Measure: EA
Supplier Lead Time: 0
Use SO Reduction Price: 5.00%
Currency: USD
Quote Price: 0.00
Quote Date: 9/16/2010
Quote Qty: 0.0
Price List:
Manufacturer: Reymont
Manufacturer Item: RC-900000-21
Comment:

Reference only

Used if no price list entered on scheduled order

Delete Back Next

When a PO is entered referencing this supplier item, optionally you can update the supplier-item data to reflect the new price if it has changed. Both the quote price and quote date are updated. The quote quantity does not change. You can choose to prevent this update, for example if the price is much higher than normal because of a rush delivery requirement.

- Both item numbers print on all communications to the supplier

Specification Frames

Supplier Item Maintenance: Specification Frame

Supplier Item Maintenance

Item Number: 02001 (2) Supplier: 10-300 Supplier Item: AUT-10005

Automotive Connector
QMI -USA Division

Unit of Measure: EA
Supplier Lead Time: 0
Use SO Reduction Price: 5.00%
Currency: USD
Quote Price: 0.00
Quote Date: 9/16/2010
Quote Qty: 0.0
Price List:

Manufacturer: Reymont
Manufacturer Item: RC-900000-21
Comment:

Used for reference only

Delete Back Next



SS-SU-070

Note Purchase order item numbers can have a maximum length of 18 characters

- When you set up a supplier item number, you can enter either item number (your internal item number or the supplier item number) on an order
- If you enter the supplier item number, the system automatically substitutes your internal item number

Exercise: Supplier Item

Note The data used in these exercises may not be the same as the data shown in the screen captures in this lesson. In an exercise, if a field is not listed, you can accept the default value or leave it blank.

Your supplier uses their own item number, so you need to set up a cross reference between your internal item number and your supplier's item number. You are also going to create a manufacturer's reference.

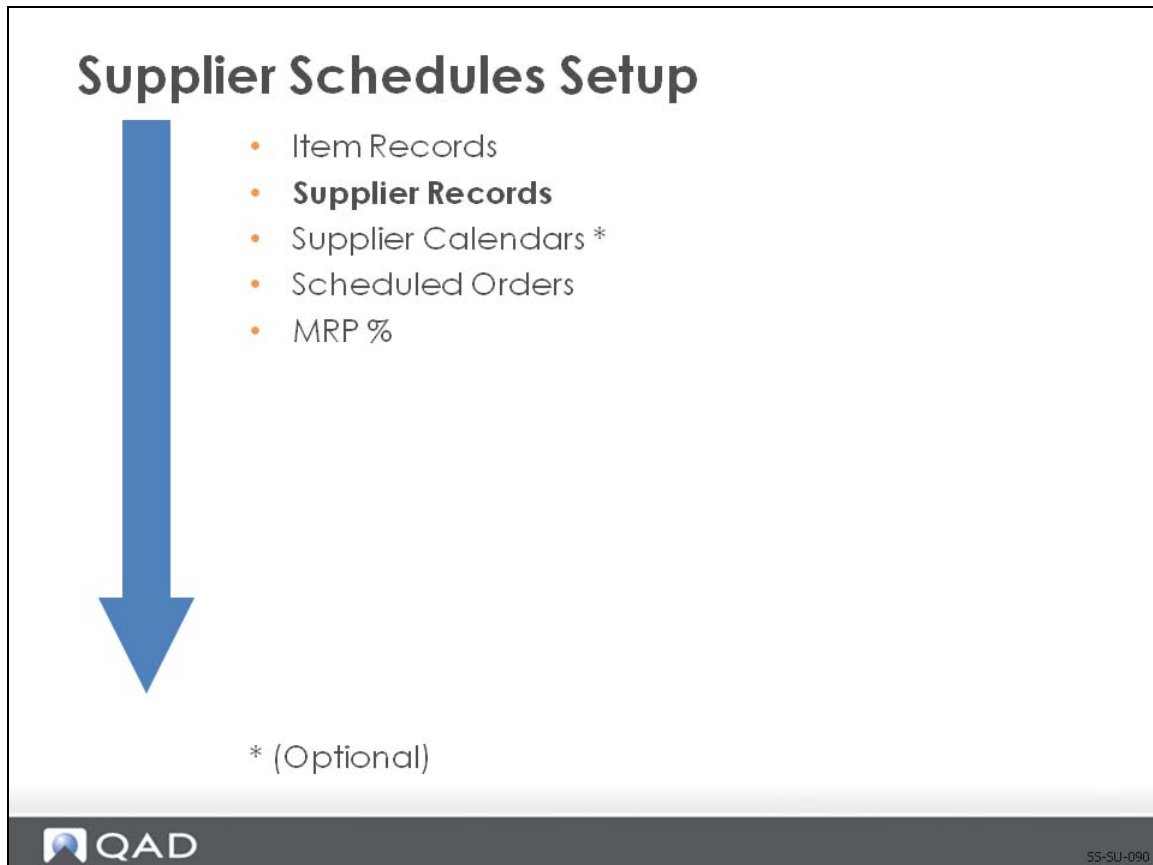
- 1 To create the cross-reference, enter the following data. Use Supplier Item Maintenance (1.19)

Field	Data
Item Number	bx-0001
Supplier	10S1003
Supplier Item	Box100

- 2 Advance to the Specification frame. You are now going to create a reference to the original manufacturer and their item number:

Field	Data
Manufacturer	Boxer
Manufacture Item	bx-0001

Supplier Records



Before a supplier schedule can be created, you must have a supplier record for each of your suppliers. This record contains supplier information used by the system.

This information is used in:

- Purchase Orders
- Accounts Payable

Supplier records contain static and control information.

- Static information is used for reporting purposes
 - Address
- Control information determines how supplier orders and accounts are processed. In Enterprise Edition, much of this information is specified during the Financials setup in Supplier Create.
 - Accounts payable
 - Currency

Supplier Address and Data Frames

Supplier Data Maintenance: Supplier Address and Data Frames

Supplier Data Maintenance

Go To Actions Copy Print Preview Attach

Supplier: 10-300 Site: 10-100 Carrier:

Supplier Address

Supplier: 10-300 Business Relation: 10-USA-CO

Name: QMI - USA Division Active: ☒

Address: 30 Ridgedale Avenue Added:

Address:

Address:

City: East Hanover State: NJ Post: 7950 Format:

Country: USA County:

Attention: [2]

Telephone: [2]

Fax: [2]

Supplier Data

Sort Name: QMI - USA Division Currency: USD

Supplier: INT Language: us

Ship Via: Daybook Set: 10PURCH

Remarks: Site: 10-100

Carrier: Kanban Supplier: ☐

Purchase Contact: Promotion Group:

Back Next

The Supplier Data Maintenance (2.3.1) address frame contains the supplier's address and contact information, displayed from the Business Relation defined for the supplier in the Enterprise Financials setup.

In the supplier data frame, you enter shipping and other data.

Supplier Pricing Data Frame

Supplier Data Maintenance: Supplier Pricing Data Frame

The screenshot shows the 'Supplier Data Maintenance' window with the 'Supplier Pricing Data' tab selected. The window contains the following fields and information:

- Supplier:** 10-300
- Business Relation:** 10-USA:CO
- Name:** QMI -USA Division
- Address:** 30 Ridgedale Avenue
- City:** East Hanover
- State:** NJ
- Post:** 7950
- Country:** USA
- Attention:** [2]
- Telephone:** [2]
- Fax:** [2]
- Active:** ☒
- Added:**
- Format:**
- Supplier Pricing Data:**
 - Buyer:** [Dropdown]
 - Price Table:** [Field]
 - Discount Table:** [Field] (An arrow points from a callout box to this field)
 - Fixed Price:** ☒

Create in Price List Maintenance

Back Next

QAD

SS-SU-120

Enter the pricing information for this supplier.

- The discount table entered here becomes the default for the supplier on the scheduled order

Note Scheduled orders can use only discount tables set up as a type P (Price) price list.

Supplier Terms Data Frame

Supplier Data Maintenance: Supplier Terms Data Frame

The screenshot shows a software window titled "Supplier Data Maintenance". It has a menu bar with "Go To", "Actions", "Copy", "Print", "Preview", and "Attach". The main content area is divided into two sections: "Supplier Address" and "Supplier Terms Data".

Supplier Address:

- Supplier: 10-300
- Business Relation: 10-USA-CO
- Name: QMI -USA Division
- Address: 30 Ridgedale Avenue
- City: East Hanover
- State: NJ
- Post: 7950
- County: USA
- Attention: [2]
- Telephone: [2]
- Fax: [2]
- Active: ☒
- Added: []
- Format: []

Supplier Terms Data:

- Cr Terms: CASH
- Discount Percent: 0.00%
- Partial OK: ☒
- DB Number: []
- CoC Number: []

A blue arrow points from a text box labeled "Maintained in Financials setup data" to the "Cr Terms: CASH" field.

Buttons: Back, Next

SS-SU-130

This frame displays the type of credit this supplier has with your company, as defined in Financials setup data.

Supplier Primary and Remit-To Addresses

Supplier Schedules Setup



- Item Records
- **Supplier Records**
 - Supplier Primary Address
 - Supplier Remit-To Address
- Supplier Calendars *
- Scheduled Orders
- MRP %

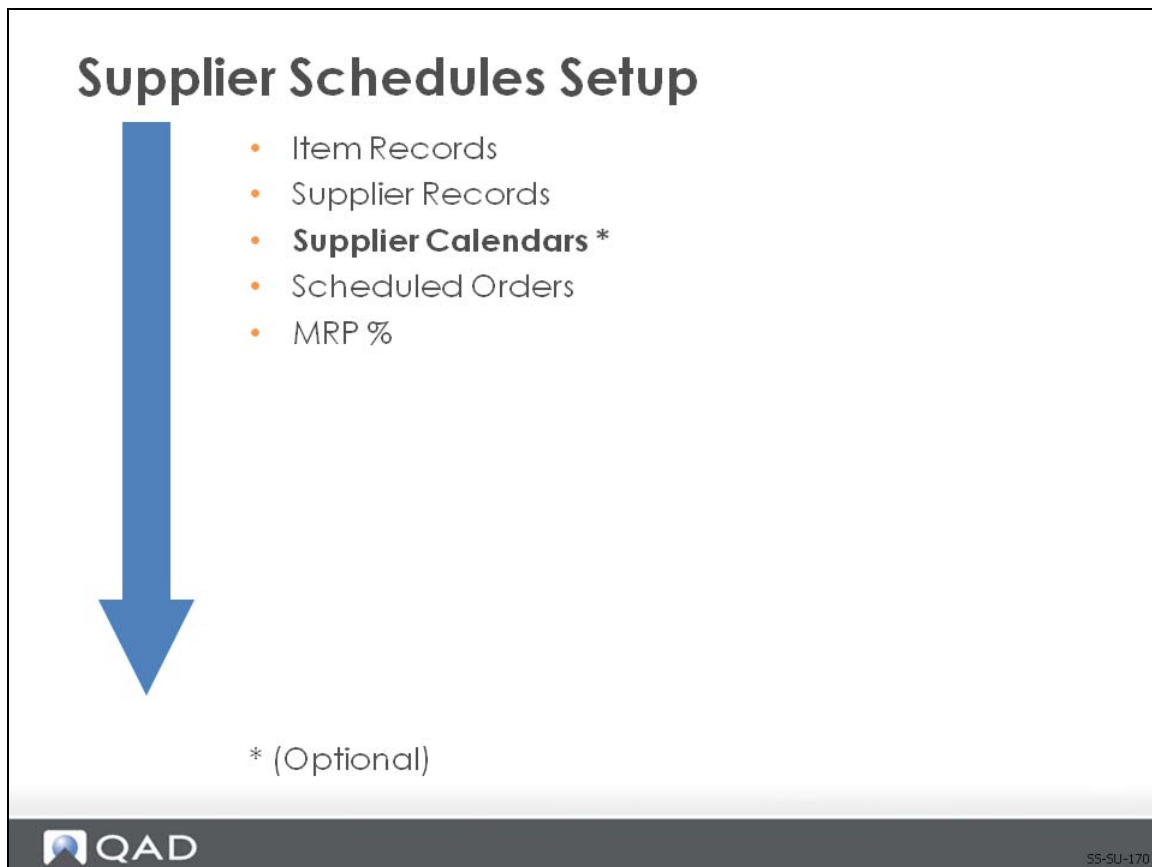
* (Optional)

SS-SU-150

Create a supplier remit-to address if the supplier wants to receive payments at an address different from the primary supplier address (defined for the Business Relation during Financials setup activities).

Note There can be only one remit-to address per supplier.

Supplier Calendars



QAD Enterprise Applications allows you to set up calendars matching your supplier's work schedule.

- Need to set up a supplier calendar if your supplier's work schedule is different from yours
- Maintain a supplier calendar for those suppliers from whom you pick up shipments
 - Schedule Update from MRP (5.5.3.1) uses the supplier calendar to calculate shipment dates, back-scheduling requirements if the initial due date is not a work day for the supplier
- If there is no supplier calendar, the system uses your calendar

Supplier Calendar Maintenance (5.5.1.1)

Supplier Calendar Maintenance

Supplier: 10-300 QMI -USA Division

Day	Operating Hours
Sunday: ☐	0.00
Monday: ☒	16.00
Tuesday: ☒	16.00
Wednesday: ☒	16.00
Thursday: ☒	16.00
Friday: ☒	16.00
Saturday: ☐	4.00

Operating Day Hour Exceptions

Reference: main

Start: 7/1/2011 End: 7/2/2011 Daily Hours: 12.00

Non-Operating Days

Date: 7/4/2011

Description: Monday

Back Next

QAD SS-SU-180

Use Supplier Calendar Maintenance to set up a supplier calendar.

- Useful when a supplier has a work schedule different from your company's work schedule
- Specify your supplier's work days and their hours of operation

Note MRP calculations are not affected by the supplier hours; they are for your information.

Operating Day Hour Exceptions Frame

- Exceptions to the supplier's calendar, such as shutdowns

Non-Operating Days Frame

- Use to define exceptions Holidays
- Access this field by clicking Back

Exercise: Supplier Calendar

Your supplier has a work schedule different from your work location. Therefore, you need to set up a supplier calendar.

Use Supplier Calendar Maintenance (5.5.1.1)

- 1 Supplier 10S1003 operates two shifts Monday through Friday for a total of 16 hours per day. They also operate on Saturday for 4 hours.
- 2 They have a shutdown from July 1 through July 14.

Scheduled Orders

Supplier Schedules Setup



- Item Records
- Supplier Records
- Supplier Calendars *
- **Scheduled Orders**
- MRP %

* (Optional)

SS-SU-200

Supplier Scheduled Order Maintenance (5.5.1.13)

Scheduled Order Maintenance: Order Data Frame

Supplier Scheduled Order Maint

Go To Actions Copy Print Preview Attach

Purchase Order: P1010001 Supplier: 10-300 Tax Class:

Purchase Order: P1010001 Supplier: 10-300

QMI -USA Division

Order Data

Start Effective: 9/16/2010 Ship Via:

End Effective:

Taxable:

Tax Class:

Credit Term: CASH

Bill-To Address: 10-100

Ship-To Address: 10-100

Print Schedules:

EDI Schedules:

Fax Schedules:

A/P Site: 10-100

Consignment:

Zero Schedules: 1

Daybook Set: 10PURCH

Comments:

Import/Export:

Back Next

Defaults from Trading Partner Parameters Maintenance 35.1

A scheduled order is like a purchase order in that it communicates demand to a supplier and receipts are processed against it. The difference is that each line item has multiple due dates and order quantities.

Note A scheduled order does not have delivery dates or times.

Tax Data Frame

Scheduled Order Maintenance: Tax Data Frame

Supplier Scheduled Order Maint

Go To Actions Copy Print Preview Attach

Purchase Order: P1010001 Supplier: 10-300 Tax Class:

Purchase Order: P1010001 Supplier: 10-300

QMI -USA Division

Order Data

Start Effective: 9/16/2010 Ship Via:

End Effective:

Taxable: ☐

Tax Class:

Credit Terms: CASH

Bill-To Address: 10-100

Ship-To Address: 10-100

Print Schedules: ☐

EDI Schedules: ☐

Fax Schedules: ☐

A/P Site: 10-100

Consignment: ☐

Zero Schedules: 1

Tax Usage:

Tax Environment: US/NJ

Currency: USD

Fixed Price: ☒

Order Revision: 0

Order Rev Date:

Print PO: ☐

Daybook Set: 10PURCH

Comments: ☐

Import/Export: ☐

Back Next



SS-SU-220

Use this frame to enter the tax information for the order.

ERS Options in Order Header

Scheduled Order Maintenance: ERS Options in Order Header

The screenshot shows the 'Supplier Scheduled Order Maint' window. The title bar includes 'Go To', 'Actions', 'Copy', 'Print', 'Preview', and 'Attach'. The main area displays 'Purchase Order: P1010001' and 'Supplier: 10-300'. Below this, the 'Order Data' section is visible. A pop-up window highlights the 'ERS Option' and 'ERS Price List Option' fields. The 'ERS Option' is set to 'Y' and the 'ERS Price List Option' is set to '0'. Other fields in the 'Order Data' section include 'Start Effective: 9/16/2010', 'End Effective:', 'Taxable:', 'Tax Class:', 'Credit Terms: CASH', 'Bill-To Address: 10-100', 'Ship-To Address: 10-100', 'Print Schedules:', 'EDI Schedules:', 'Fax Schedules:', 'A/P Site: 10-100', 'Consignment:', 'Zero Schedules: 1', 'Ship Via:', 'FOB:', 'Buyer:', 'Contact:', 'Contract:', 'Currency: USD', 'Price:', 'Revision: 0', 'Order Rev Date:', 'Print PO:', 'Daybook Set: 10PURCH', 'Comments:', and 'Import/Export:'.



SS-SU-230

If ERS processing is activated by setting ERS Processing to Yes in ERS Control (28.10.24), the ERS options in the order header frame display after the tax data frame.

- ERS processing does not take place until the shipper is received

Note If ERS Maintenance (28.10.1) settings affecting an existing scheduled order are changed, you must manually update the scheduled order based on the new settings.

Line Item Frame

Scheduled Order Maintenance: Line Item Frame

Supplier Scheduled Order Maint

Go To Actions Copy Print Preview Attach

Purchase Order: P1010001 Supplier: 10-300 Ship-To Site: 10-100

Purchase Order: P1010001 Supplier: 10-300

QMI -USA Division

Item Number: bx-0001 Box: 100

Carton: 1g

Ship-To Site: 10-100 Line: 2

Back Next

QAD SS-SU-240

The next frame in Supplier Scheduled Order Maintenance is the Line Item frame. This is where you identify what is being purchased (ordered) from the supplier and where it is to be delivered.

First Order Line Item Data Frame

Scheduled Order Maintenance: First Order Line Item Data Frame

Supplier Scheduled Order Maint

Go To

Actions

Copy

Print

Preview

Attach

Purchase Order: P1010001

Supplier: 10-300

Ship-To Site: 10-100

Purchase Order: P1010001

Supplier: 10-300

QMI -USA Division

Item Number: bx-0001

Box100

Carton, 1g

Ship-To Site: 10-100

Line: 2

Order Line Item Data

Discount Tbl:

Unit Cost: 0.00

Pur Acct: 6610

Taxable:

Type:

Consignment:

Item Revision:

Item Rev Date:

Mech

ADM

Update Current Cost:

Location: 100

Fixed Price:

Unit of Measure: EA

UM Conversion: 1.0000

Work Order ID:

Operation: 0

Subcontract Type:

Delete

Back

Next

QAD

SS-SU-250

This frame contains the line item’s pricing and inventory information.

ERS Options in Order Line Item

Scheduled Order Maintenance: ERS Options in Order Line Item

The screenshot displays the 'Supplier Scheduled Order Maint' window. The top section shows 'Purchase Order: P1010001', 'Supplier: 10-300', and 'Ship-To Site: 10-100'. Below this, 'Purchase Order: P1010001' and 'Supplier: 10-300' are repeated, along with 'QMI -USA Division'. The 'Item Number: bx-0001' is shown with 'Box: 100' and 'Carton: 1g'. The 'Ship-To Site: 10-100' and 'Line: 2' are also visible. The 'Order Line Item Data' section contains various fields: 'Discount Tbl: 0.00', 'Unit Cost: 0.00', 'Pur Acct: 6610', 'Mech', 'Taxable: ☒', 'Type: ☐', 'Consignment: ☐', 'Item Revision:', 'Item Rev Date:', 'Update Current Cost: ☒', 'Location: 100', 'Fixed Price: ☒', 'Unit of Measure: EA', 'UM Conversion: 1.0000', 'Work Order ID:', 'Operation: 0', and 'Subcontract Type:'. A small pop-up window titled 'ERS Options' is open, showing 'ERS Option: 1' and 'ERS Price List Option: 0'. At the bottom right are 'Back' and 'Next' buttons. The QAD logo is in the bottom left, and 'SS-SU-260' is in the bottom right.

If ERS processing is activated by setting ERS Processing to Yes in ERS Control (28.10.24), the ERS options at the order line frame displays after the first Order Line Item Data frame.

- ERS processing does not take place until the shipper is received

Note If ERS Maintenance (28.10.1) settings affecting an existing scheduled order are changed, you must manually update the scheduled order based on the new settings.

Second Order Line Item Data Frame

Second Order Line Item Data Frame

Supplier Scheduled Order Maint

Go To

Actions

Copy

Print

Preview

Attach

Purchase Order:P1010001

Supplier:10-300

Supplier Item:Box100

Purchase Order: P1010001

Supplier: 10-300

QMI -USA Division

Order Line Item Data

Firm Days:

0

Schedule Days:

0

Schedule Weeks:

0

Schedule Months:

0

Fab Auth Days:

0

Raw Auth Days:

0

Transport Days:

0

Safety Days:

0.00

Supplier Item:

Box100

Container Item:

Ship Delivery Pattern Code:

Max Order Qty:

0.0

Std Pack Qty:

1

Cum Start:

9/16/2010

Comments:

Start Effective:

9/16/2010

End Effective:

Back

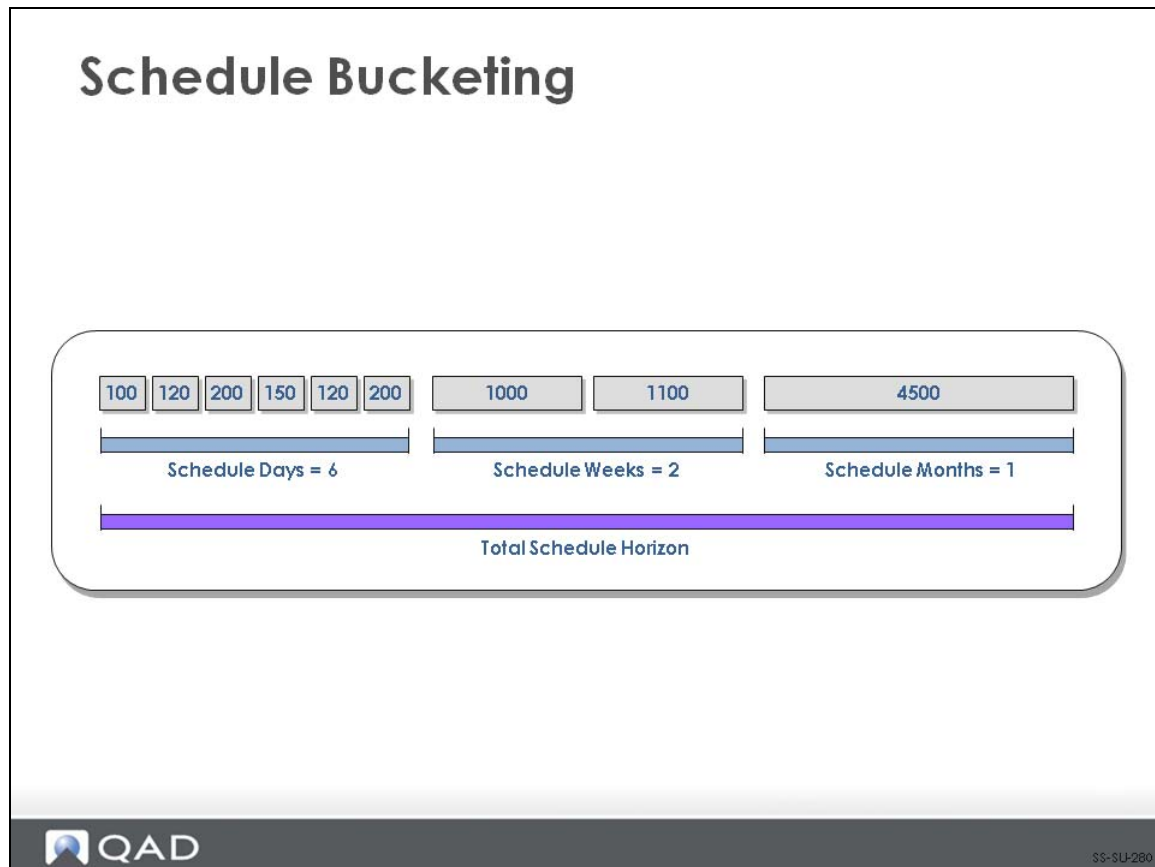
Next

QAD

SS-SU-270

This frame contains information used to record data that impacts the requirements and schedules generated for the line items.

Schedule Bucketing



A spreadsheet used to show resource loadings by time period—typically using monthly buckets.

Exercise: Creating Demand and Scheduled Orders

Note The data used in these exercises may not be the same as the data shown in the screen captures in this lesson. In an exercise, if a field is not listed, you can accept the default value or leave it blank.

You are going to create a forecast for item number bx-0001 using the default site previously given to you. Then you are going to run MRP to create the demand (that is, create the work orders).

- 1 Starting with next week, enter a 12-week forecast, using 100 of item bx-0001 per week.
Use Forecast Maintenance (22.1)
- 2 Run selective MRP for your item number and site, accepting the defaults.
Send the output to your printer. If you do not have a printer, set the output to a file name such as “mrp.”
Use Selective Materials Plan (23.3)
- 3 Review the MRP results. You should have some planned work orders (designated WO) on the supply side.
Use Planned Order Browse (23.9), MRP Summary Inquiry (23.13) or MRP Detail Inquiry (23.16)

You are now ready to create the scheduled order for supplier 10S1003.

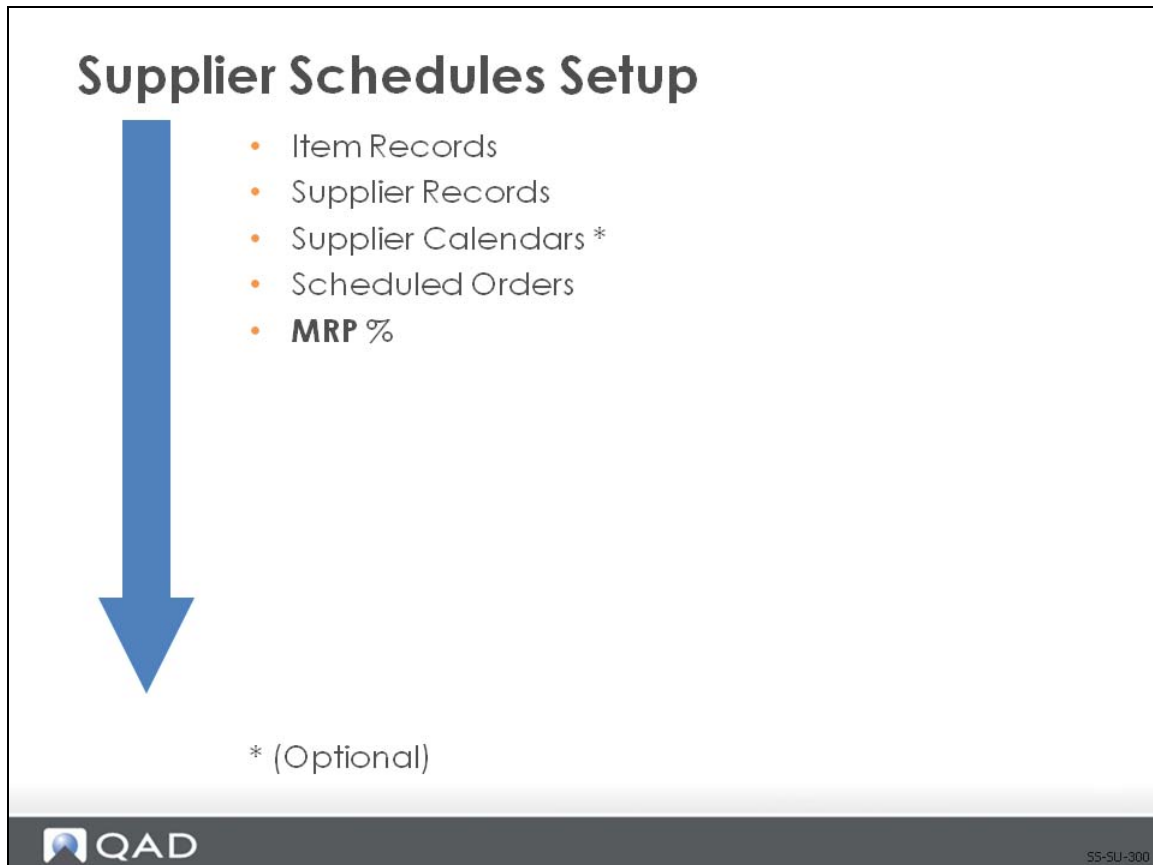
- 1 You are going to set up the order data for this supplier schedule. Let the system assign the purchase order number.
Record the purchase order number: _____
Use Supplier Scheduled Order Maintenance (5.5.1.13)
- 2 Advance to the Order Data frame and accept all the default information.
Next, you are going to set up the order detail.
- 3 In the Item/Site frame, enter your item number, BX-0001 and ship-to site, 10-100. Let the system assign the line number.
When the system prompts you to copy data from another order line for this item, choose No.
- 4 In the first Order Line Item Data frame, accept the remaining default information.
- 5 In the second Order Line Item data frame, enter the following:

Field	Data
Schedule Days	14
Schedule Weeks	6
Schedule Months	6
Fab Auth Days	30
Raw Auth Days	60
Transport Days	2
Ship Delivery Pattern Code	10 (any day Mon-Fri)

Note Note the defaults of the Supplier Item and Cum Start fields.

- 6 View the scheduled order details. Use Supplier Scheduled Order Inquiry (5.5.1.14) or Scheduled Order Report (5.5.1.15). Set the output to Page.

MRP%



You need to determine how you want your scheduled requirements to be allocated across suppliers in a multi-sourcing environment.

- Even with a single source, you still need to determine the allocation

Note With a single source, you would allocate 100% to the supplier.

- Schedule Update from MRP (5.5.3.1) uses these percentages to allocate MRP planned orders for the item among suppliers

Scheduled Order MRP% Maintenance (5.5.1.17)

Scheduled Order MRP % Maintenance

Item: bx-0001 Ship-To Site: 10-301 Item Number: bx-0001 Effective: 9/16/2010

Order	Percent	Line	End Effective
p1010001	100	1	

To phase in new percentages, enter same Ship-To Site and Item Number with a different Effective date

Back Next

QAD SS-SU-310

Use Scheduled Order MRP% Maintenance (5.5.1.17) to distribute supply percentages between suppliers.

Note Use this function when you are phasing out one supplier and replacing them with a new one. You can control the percentages using the start from dates (Effective) while the new supplier takes on more load or finds the required quality levels.

Exercise: Calculating Percentage

You are now ready to calculate the percentage of MRP-planned orders to be scheduled using this supplier schedule.

- 1 Using today's date as your Effective date, enter 100% for your purchase order.
Use Scheduled Order MRP % Maintenance (5.5.1.17).

Chapter 4

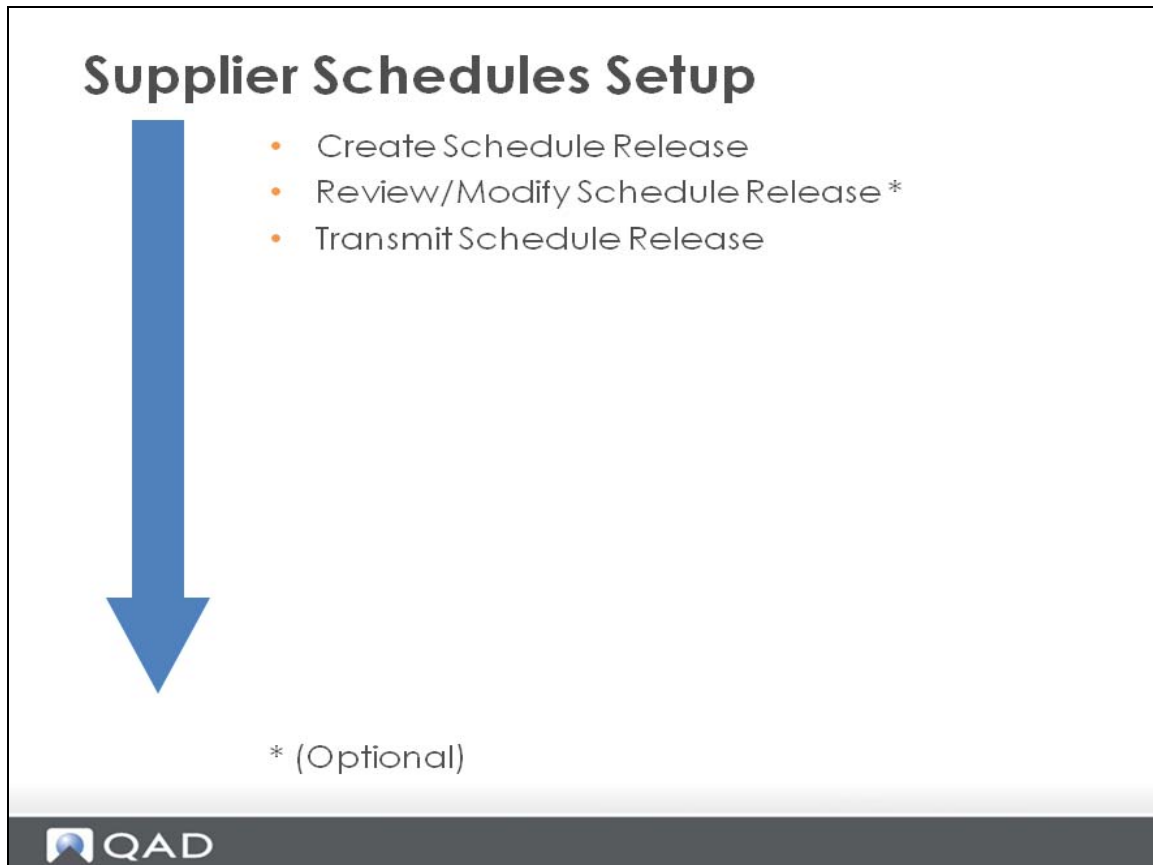
Process Supplier Schedules

Process Supplier Schedules

In this section you learn how to:

- ✓ Identify key business considerations before setting up Supplier Schedules in QAD Enterprise Applications
- ✓ Set up Supplier Schedules in QAD Enterprise Applications
- **Process Supplier Schedules in QAD Enterprise Applications**
- Process Supplier Schedules Receipts in QAD Enterprise Applications

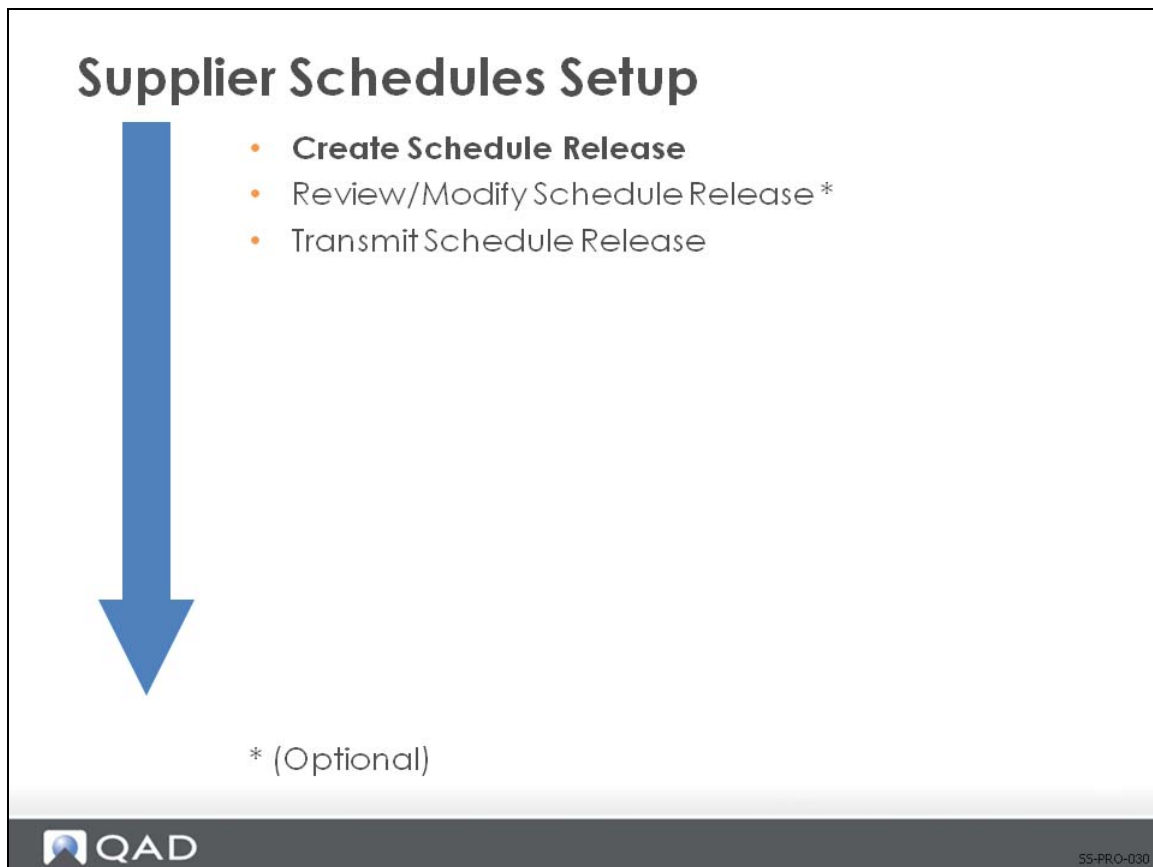
Supplier Schedules Setup



- 1 Create Schedule Release.
- 2 Review /Modify Schedule Release (optional).
- 3 Transmit Schedule Release.

This illustration is a suggested processing sequence of supplier schedules, which is based on information that flows from one master record to another and prerequisites that need to be accomplished before setting up a record.

Create Schedule Release



Once you have the MRP demand, you can take the MRP requirements and determine the due dates and quantities for each scheduled order item by supplier. With this information, you are ready to produce a new active schedule release.

- A release is a set of item quantities and requirement dates identified by a release ID number
- The release is what you send to your supplier

Schedule Update from MRP (5.5.3.1)

Schedule Update from MRP

First day of this schedule release

QAD SS-PRO-040

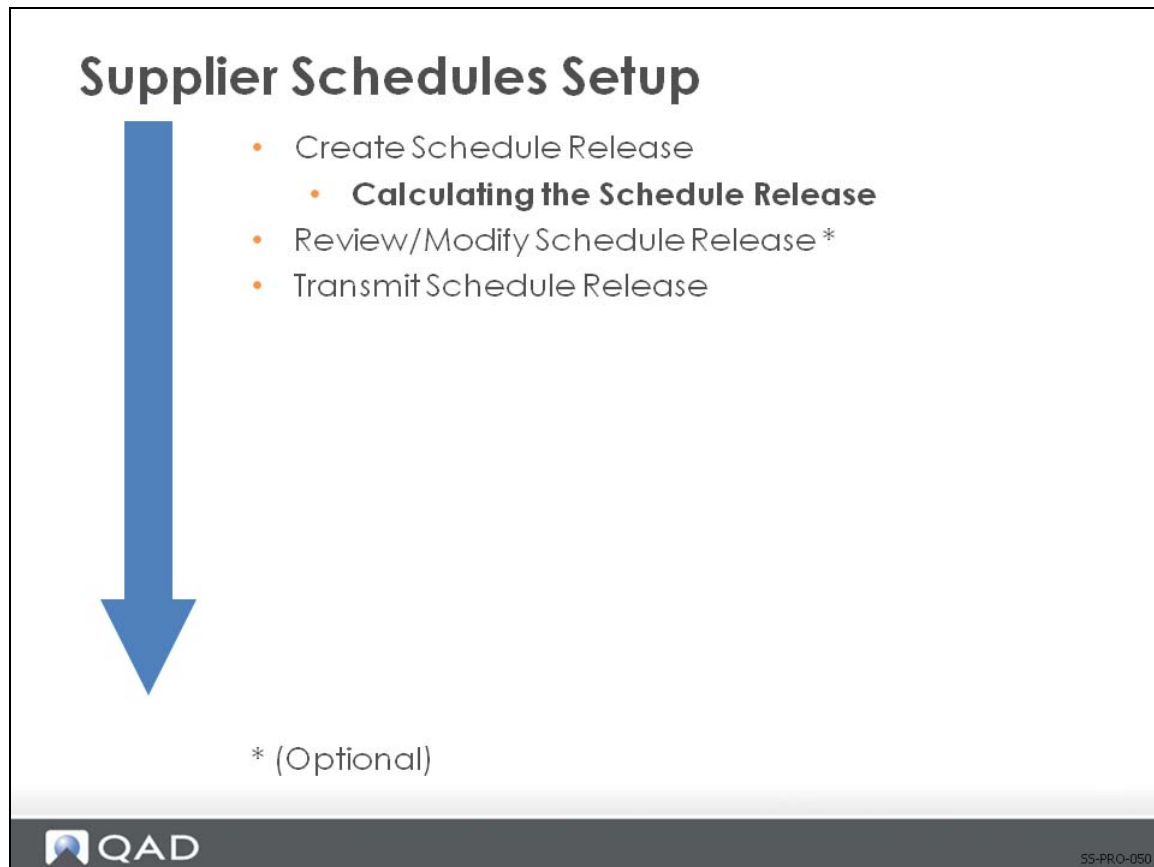
Use Schedule Update from MRP (5.5.3.1) to automatically create a new release of a supplier schedule.

Select the scheduled order(s) using one or more of the following:

- Purchase Order (scheduled order)
- Item Number
- Ship-To (receiving site)
- Supplier
- Buyer

To select all, leave the fields blank.

Calculating the Schedule Release



Using the selection criteria you enter, Schedule Update from MRP:

- Locates all planned orders from MRP for the selected items
- Looks at the scheduled order for the supplier and adjusts the quantities and due dates using the scheduled order's parameters

Note These parameters are set in the Order Line Item Data frame of Supplier Scheduled Order Maintenance.

In calculating the schedule release, Schedule Update from MRP performs the following calculations.

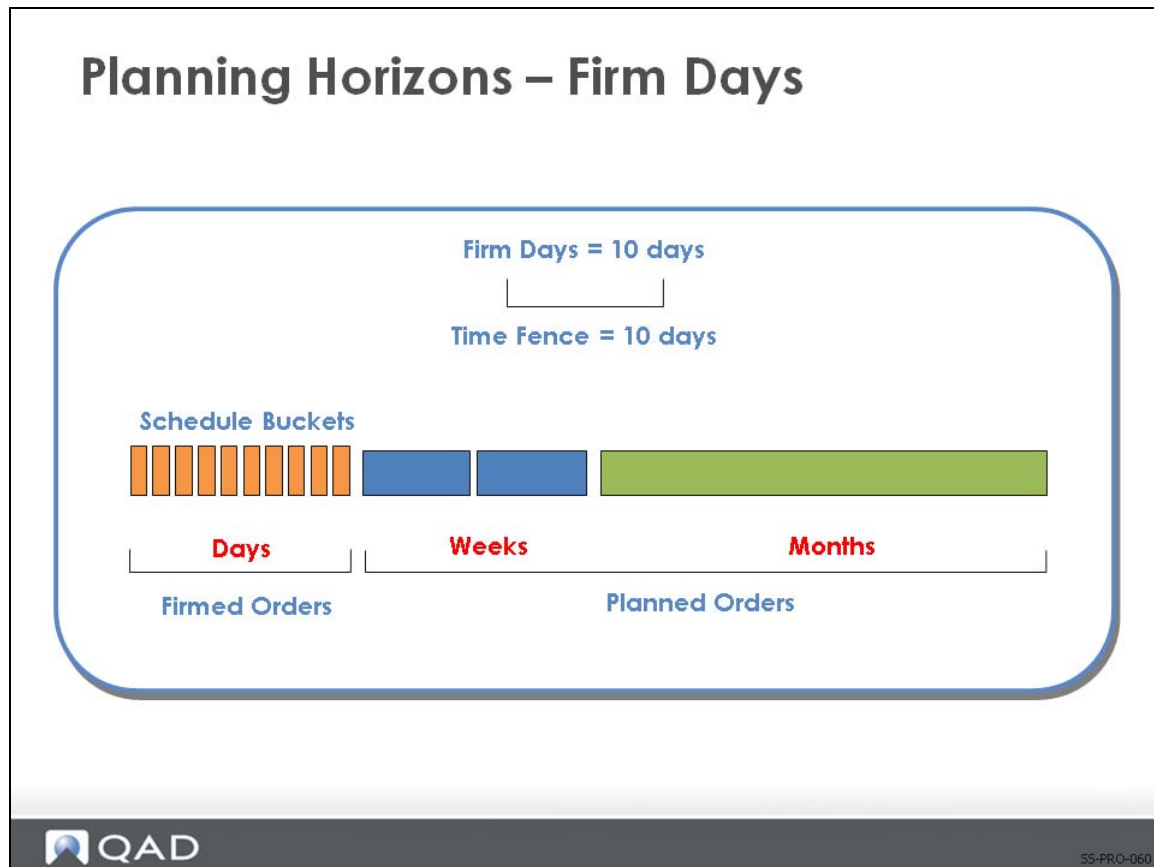
- Back-schedules for safety days from planned order due dates
- Back-schedules for ship/delivery pattern from safety day schedule
- Back-schedules for supplier calendar from ship/delivery date
- Distributes the requirements among the suppliers using the percentages specified in Scheduled Order MRP% Maintenance (5.5.1.17)
- Revises net required (i.e., open, not scheduled) quantities to standard pack quantity multiples
- Displays any unfulfilled prior cumulative requirements
- Creates the release
- Assigns a Release ID

Note In Supplier Schedule Control (5.5.1.24), if Generate Date Based Release ID is set to Yes, a newly created release gets a release number with a format of YYYYMMDD-nnn, otherwise it gets the usual 6-digit serial number.

- Determines whether quantities are firm (i.e., within the Firm Days time fence) or planned
- Displays fabrication and raw authorization quantities and the start and end dates

Note Each time you run Schedule Update from MRP, all or part of the schedule is replaced depending on the Firm Days field value.

Planning Horizons - Firm Days



The setting of the Firm Days field in Supplier Scheduled Order Maintenance (5.5.1.13) affects the calculation of the schedule release. Because you are sending order quantities and planning data to your supplier, you define requirements as either firmed or planned quantities. You can send all firm, all planned, or some of both types of requirements. The value of the Firm Days field for the scheduled order line item defines the time fence and consequently determines the order status.

Schedule Update from MRP automatically applies firm status to any requirements falling within the time fence set by the Firm Days field. All planned orders outside this time fence are approved, but maintained as planned requirements. In other words, they are not seen by MRP as sources of supply and can be replanned.

When creating a new schedule release, Schedule Update from MRP does the following:

- Checks for an active schedule release with unreceived firm requirements

If one exists:

- The firm requirements are carried forward to the new release
- Firm requirements prior to the beginning date of the new schedule release (as of date) are maintained as prior cumulative requirements (Prior Cum Req)
- Accesses MRP planned order information and adds it to the new schedule release, starting one day after the end of the firm time period of the old schedule release
 - Firms any planned orders falling within the Firm Days time fence

When MRP is run again, it plans or replans orders for scheduled requirements that are now within its planning horizon. Once a schedule is created with firm data in it, MRP does not generate planned requirements with dates falling within the Firm Days time fence of the schedule release. However, if there is an increase or decrease in demand, the following occurs:

- If increased demands create additional requirements within the Firm Days time fence, MRP creates planned orders in that time period
- When you regenerate the schedule release, the system does not select any planned orders falling within the Firm Days time fence covered by a schedule
 - The warning message `Order not selected` displays
- If decreased demand decreases requirements, MRP sees the supply as excessive and produces action messages
 - Action messages recommend what action a master scheduler should take to balance supply and demand

You can set the Firm Days field to a positive value or zero (0).

Positive Value

Schedule Update from MRP:

- Generates firm requirements for a new schedule release
- Carries forward outstanding firm requirements to new schedule releases
 - Firm requirements are visible to MRP as scheduled supply

Zero (0) Value

Schedule Update from MRP does not:

- Generate firm requirements for a new schedule release
- Carry forward any requirements from previous schedule releases

If 0, the update process generates each new schedule release from MRP planned data.

- All data is designated as planned
- Data designated as planned is not visible to MRP

The update process sets the prior cumulative requirements (Prior Cum Req) to the current value of the cumulative received (Cum Received). If any planned order has a requirement date falling before the beginning date of the schedule release, it is added to the prior cumulative requirements.

Note To avoid schedule discrepancies between printed bucketed schedules and the actual required schedule, firm days should never exceed the number of days specified in the Schedule Days field (set in Supplier Scheduled Order Maintenance).

Exercise: Create Schedule Release

Create a schedule release for your scheduled order.

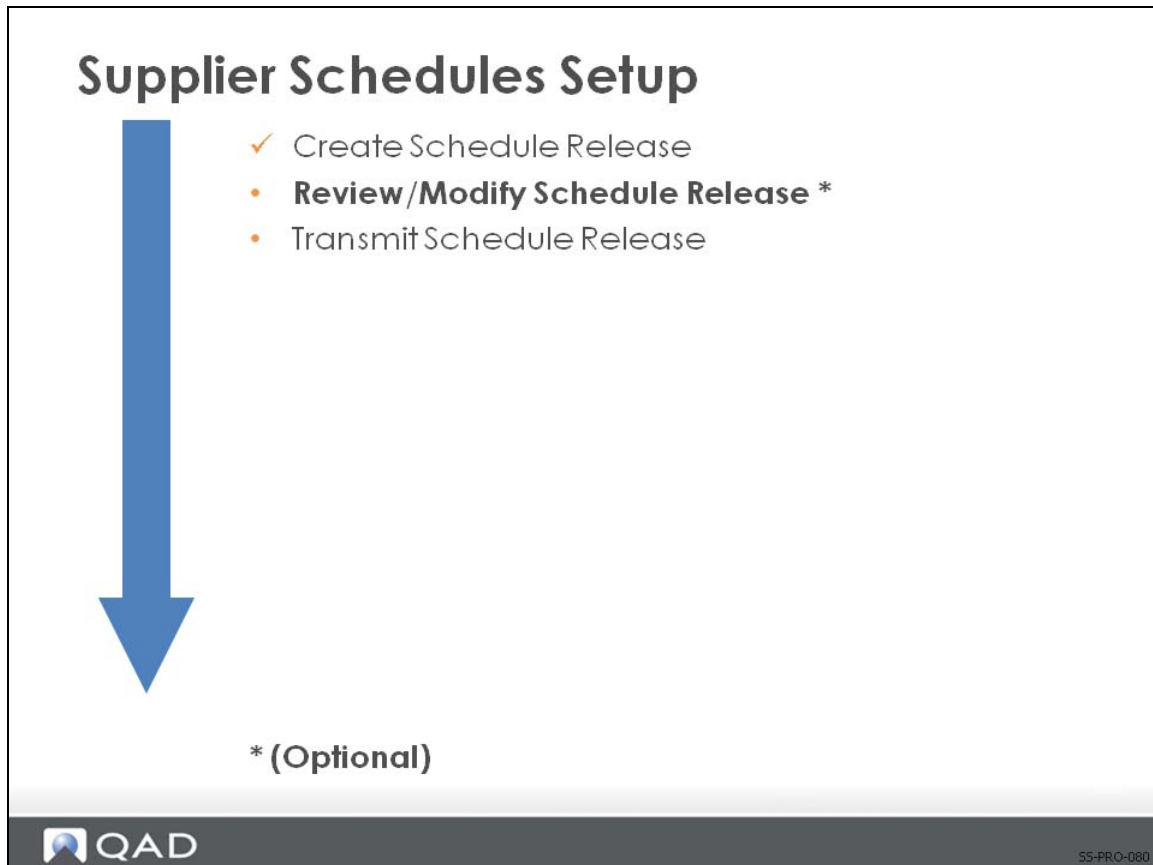
Use Schedule Update from MRP (5.5.3.1).

- 1 Using your scheduled order number, run the update. Let the As of Date default to the system date.

Field	Data
Report Detail/Summary	Detail
Print Exceptions Only	No
Update	Yes

- 2 Send the output to Page.
- 3 Review the output, taking note of the calculation steps.

Review/Modify Schedule Release



There may be times when you need to modify a scheduled order release or simply wish to review the release data. For example, if the requirements change in a release, you will need to manually adjust the firm quantities. You can change release data such as:

- Requirement dates
- Quantities
- Firmed or planned status
- Fab and raw authorization quantities and dates

Schedule Maintenance (5.5.3.3)

Schedule Maintenance

Purchase Order: P1010001

Supplier:

Ship-To:

Line: 1

UM:

Back Next

QAD SS-PRO-090

Use Schedule Maintenance (5.5.3.3) to modify or review a scheduled order release. You can also use Schedule Maintenance to reactivate a schedule release or to create schedule releases manually.

There are four frames of data.

Header Frames

There are two header frames. The first header frame identifies the scheduled order release you wish to see. To select the most current release, press Enter on the Release ID field.

In the second header frame you specify the prior cumulative date and the active start date.

Schedule Detail Data Frame

Schedule Maintenance: Schedule Detail Data

Purchase Order: P1010001 Supplier: 10-300 Ship-To: 10-301

Item Number: bx-0001 Box: 100 Line: 1

Supplier: 10-300 QMI: USA Division UM: EA

Ship-To: 10-301

Release ID: 20100916-001

Schedule Detail Data

Date	Time	Reference	Quantity Q
9/16/2010	:		100.0 P

Back Next



SS-PRO-100

The third frame displays the dates, quantities, and status of individual lines in the release. If you need to alter this information, you do so in this frame.

- If you needed to create a manual schedule release, you would enter the information here
 - For example, if you are just starting a product up and the planning parameters are not yet set, but the item has a significant lead time

Resource Authorization Data Frame

Schedule Maintenance: Resource Authorization Data

Schedule Maintenance

Go To Actions Copy Print Preview Attach

Purchase Order: P1010001 Supplier: 10-300 Ship-To: 10-301

Purchase Order: P1010001 Line: 1
 Item Number: bx-0001 Box: 100 UM: EA
 Supplier: 10-300 QMI - USA Division
 Ship-To: 10-301
 Release ID: 20100916-001

Resource Authorization Data

Fab Qty: 100.0 Fab Start: 9/16/2010 Fab End: 10/15/2010
 Raw Qty: 100.0000000 Raw Start: 9/16/2010 Raw End: 11/14/2010

Back Next

QAD SS-PRO-110

This frame shows the fabrication and raw materials amounts and dates.

- Defaults from the scheduled order created in Supplier Scheduled Order Maintenance (5.5.1.13)
- Changes made to this information affect this release only

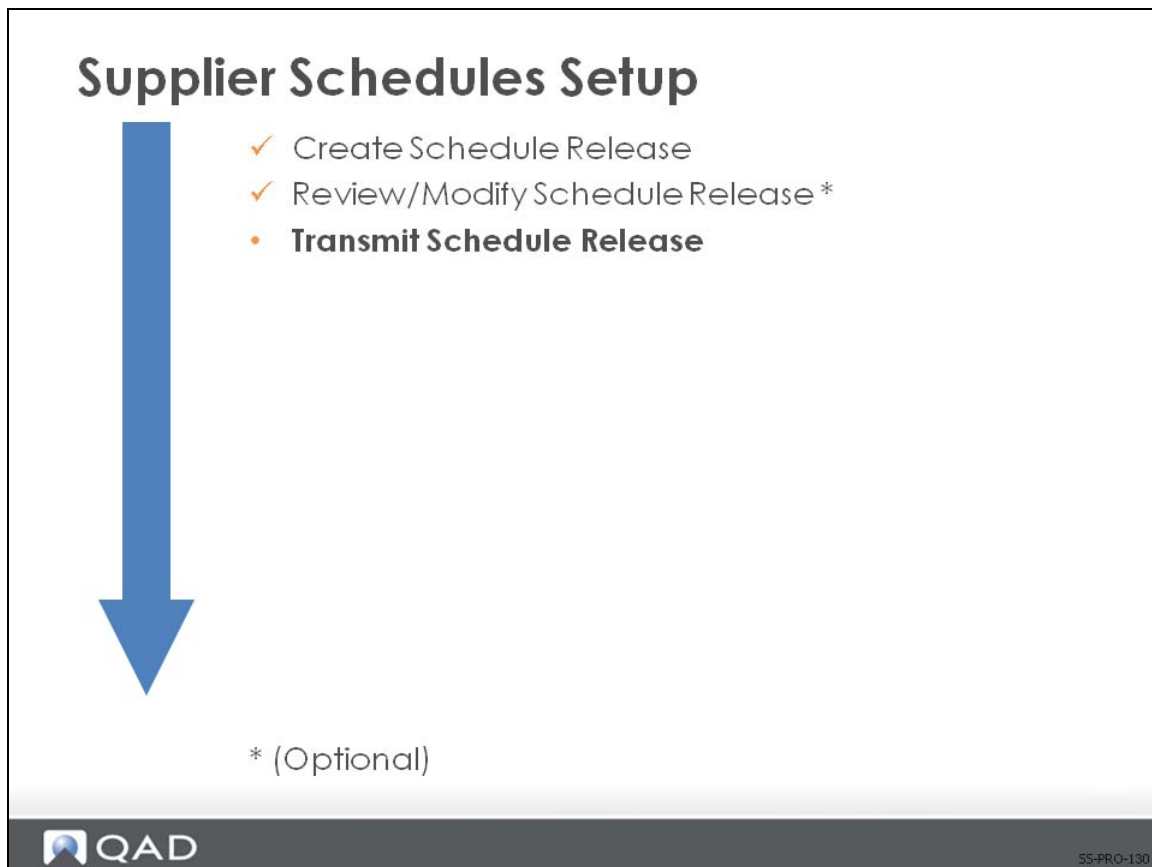
Note If you are manually creating a release, after this frame you are prompted to make this release active.

Exercise: Review Schedule Release

Review the schedule release you just created.

- 1 Use Schedule Maintenance (5.5.3.3) to bring up your schedule release. Use the lookup icon to find your purchase order. Press Enter to access the current Release ID.
- 2 Go through each frame, reviewing your schedule order details. Make sure that what you see is what you expected.

Transmit Schedule Release



Schedule Release can be transmitted in a variety of ways. The appropriate defaults in Trading Partner Parameters Maintenance (35.13.10) must be set up. The value you set up there defaults to the scheduled order—Supplier Scheduled Order Maintenance (5.5.1.13), where you can accept the default or override it.

Schedule Print (5.5.3.8)

Use Schedule Print (5.5.3.8) to print the schedule release. Schedule releases can be printed individually or in batch mode. You have the option of printing schedule releases having zero (i.e., no) requirements.

The printed schedule release shows the order's long-range requirements, detailed by dates and quantities. It has two sections:

- Header section
- Line item section

The header section identifies the release ID, contains supplier and ship-to information, and general information about the release. It also shows:

- Release date
- In transit quantity
- Receipt date and receipt quantity
- Cumulative received quantity
- Shipper ID
- Ship/delivery pattern

The line item section shows the order detail information for each scheduled requirement. Information such as:

- Ship or delivery interval

- Ship or delivery date
- Ship or delivery time
- Required quantity: The discrete or bucketed quantity for the scheduled line
- Cumulative required quantity: Total cumulative requirement including the line quantity, for the entire life of the order
- Net required quantity: Total open quantity including the line quantity

Exercise: Print Schedule Release

View your schedule release. Review the information. Use Schedule Print (5.5.3.8); set the output to Page.

Schedule Print in Fax Format

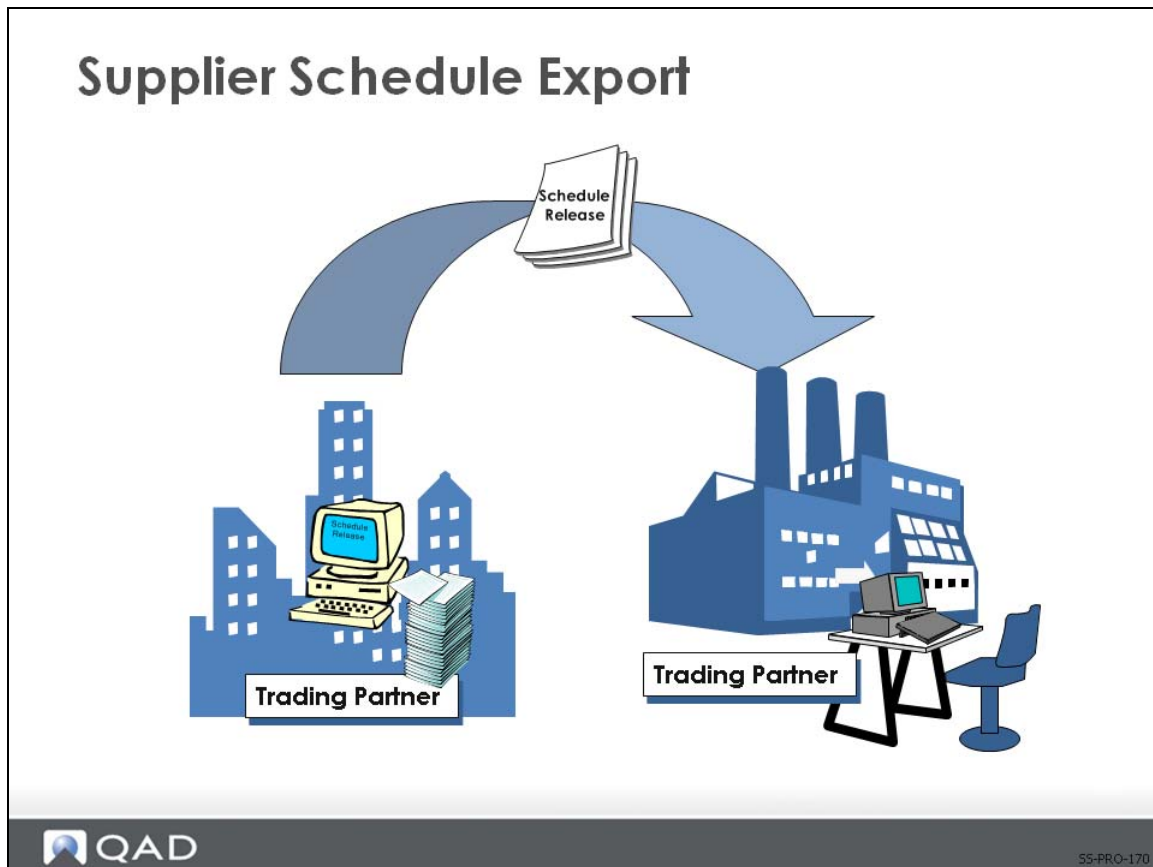
Use Schedule Print in Fax Format (5.5.3.9) to select orders you are faxing to your supplier. Schedule releases can be faxed individually or in batch mode. You have the option of including schedule releases having zero requirements.

Note The actual faxing is done by an external fax transmitting system.

The system sorts the orders by supplier. At the top of the first schedule for each supplier, a pound sign (#) prints, followed by the supplier's fax number.

The scheduled order release being faxed shows the long-range requirements, detailed by dates times, and quantities.

Supplier Schedule Export



Export supplier schedules using the Supplier Shipping Schedule export program (35.4.8) in EDI eCommerce.

Note Before you can export the release to a supplier, you need to set up the supplier in Trading Partner Parameters Maintenance (35.13.10).

After exporting the supplier schedule, you can run Schedule Export Audit Report (35.4.6.4) to check for error messages and verify if the export process was successful.

Supplier Shipping Schedule (35.4.8)

Supplier Shipping Schedule

Supplier Shipping Schedule

Go To Actions Copy Print Preview Attach

Item Number: To:

Purchase Order: To:

Item Number: To:

Supplier: To:

Ship-To: To:

Buyer: To:

Export Supplier Schedule: ☒

Export Planning Schedule: ☐

Export Shipping Schedule: ☐

Include EDI Only Schedules: ☒

Print Zero Schedules: ☒

Print Details: ☒

Print Fail/Pass/Both: ☐ Both

EDI Batch Number: 0

Output:
Batch ID:

Back Next

QAD SS-PRO-160

Use Supplier Shipping Schedule (35.4.8) to export scheduled order releases to your supplier.

- Schedule releases can be exported individually or in batch mode
- You have the option of including schedule releases having zero requirements

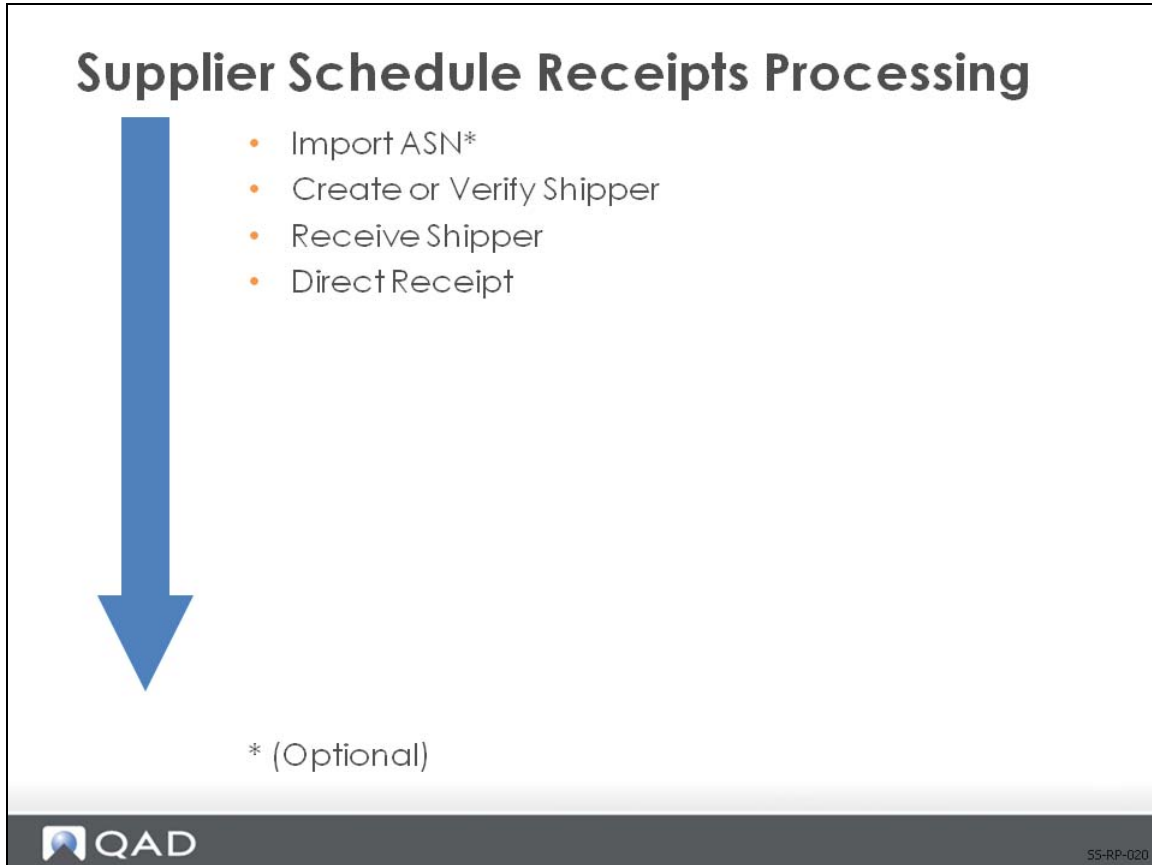
Chapter 5

Supplier Schedules Receipt Processing

Process Supplier Schedules Receipts

In this section you learn how to:

- ✓ Identify key business considerations before setting up Supplier Schedules in QAD Enterprise Applications
- ✓ Set up Supplier Schedules in QAD Enterprise Applications
- ✓ Process Supplier Schedules in QAD Enterprise Applications
- **Process Supplier Schedules Receipts in QAD Enterprise Applications**



- 1 Import ASN (Optional).
- 2 Create or verify shipper.
- 3 Receive shipper.
- 4 Direct receipt.

This illustration is a suggested processing sequence of supplier schedules, which is based on information that flows from one master record to another and prerequisites that need to be accomplished before setting up a record.

Receipt Processing

How you receive items against your scheduled release depends on the relationship you have set up with your supplier. You can receive notification of the shipment by:

- ASN
 - ANSI ASC X12 856 document, defined by an ASN number
 - Transmitted when a shipment leaves the supplier's shipping dock
 - Provides you with advanced notice of the items just shipped
 - Can represent multiple items over multiple orders
- Packing list
 - Send with the shipment

- Identified by a Shipper ID
- Shows quantities and items
- Shipping labels
 - Bar code labels affixed to each shipment container and container group
- Invoice
 - Shows quantities and items detail by order, with extended pricing

Once you receive notification of the shipment, you have three ways to process/receive the shipment:

- Import, verify, receive, and confirm the ASN
- Manually create, receive, and confirm a shipper
- Direct receipt using the Purchasing module

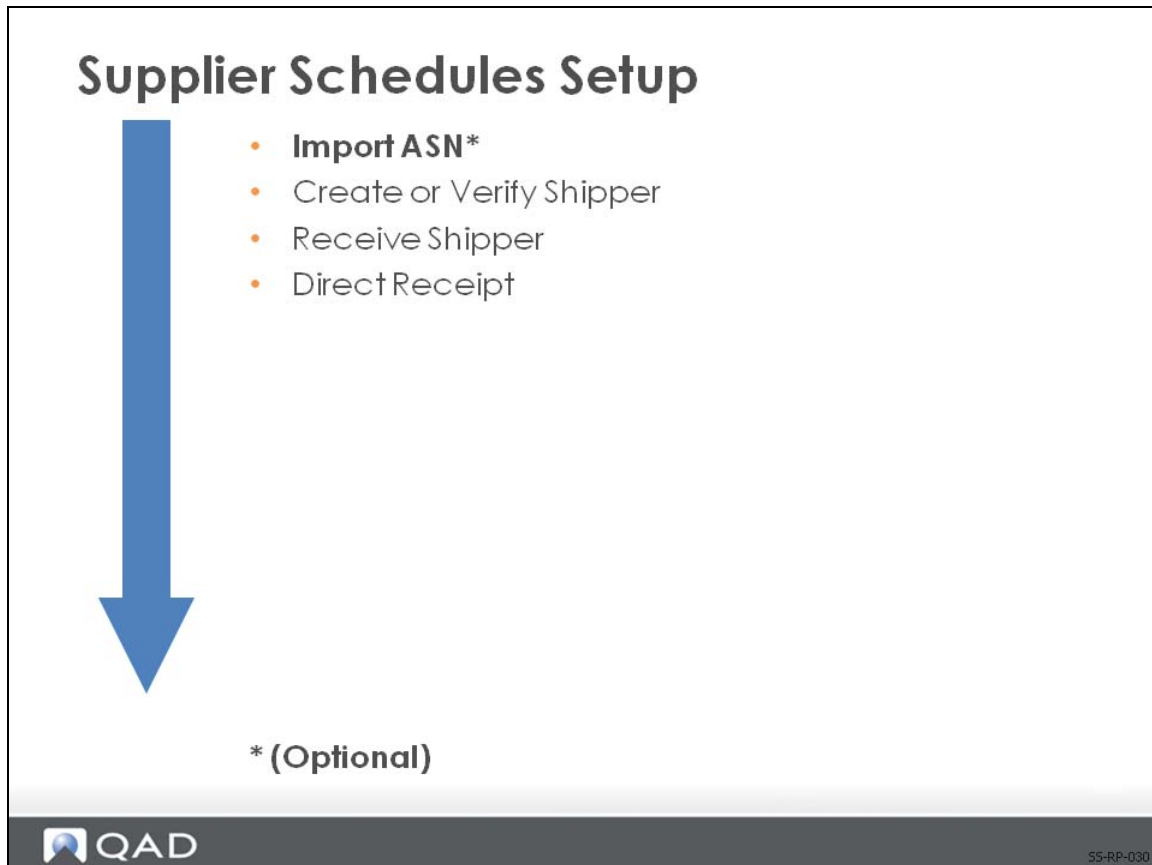
The receiving process begins with the arrival of either an ASN, signifying a shipment is on the way, or by the actual shipment and accompanying documentation. The first step is to record or verify the shipment data such as shipment ID, items in the shipment, quantities, costs, and sometimes containers.

If receipt was by way of an ASN, the information will be in your system after importing the ASN. You can verify the shipment data before you receive and confirm the shipment. If your supplier did not send an ASN, you will need to enter the shipment data into the system to create a shipper.

Once the shipment data is in the system, you then receive and confirm the shipper. This updates three history records:

- Purchase receipts
- Inventory transactions
- Inventory GL costs

Import ASN



Frequently an ASN is sent using EDI as soon as the shipment leaves the supplier's shipping dock.

Some suppliers transmit only an ASN. You then treat the ASN as the receiving document and the invoice. Each ASN is identified by an ASN number. This number acts as the shipper number and the invoice number.

Note Before you can import from a supplier, you need to set up the supplier in Trading Partner Parameters Maintenance (35.13.10).

Document Import (35.1)

Document Import

Document Import

Go To Actions Copy Print Preview

File Type (New/Error): New Direction: Inbound

Pre-Select All: ☒ Print Details: ☒

Print Fail/Pass/Both: Both

Input Directory: ec/in

File Mask:

Files:

Sessions:

Output:

Batch ID:

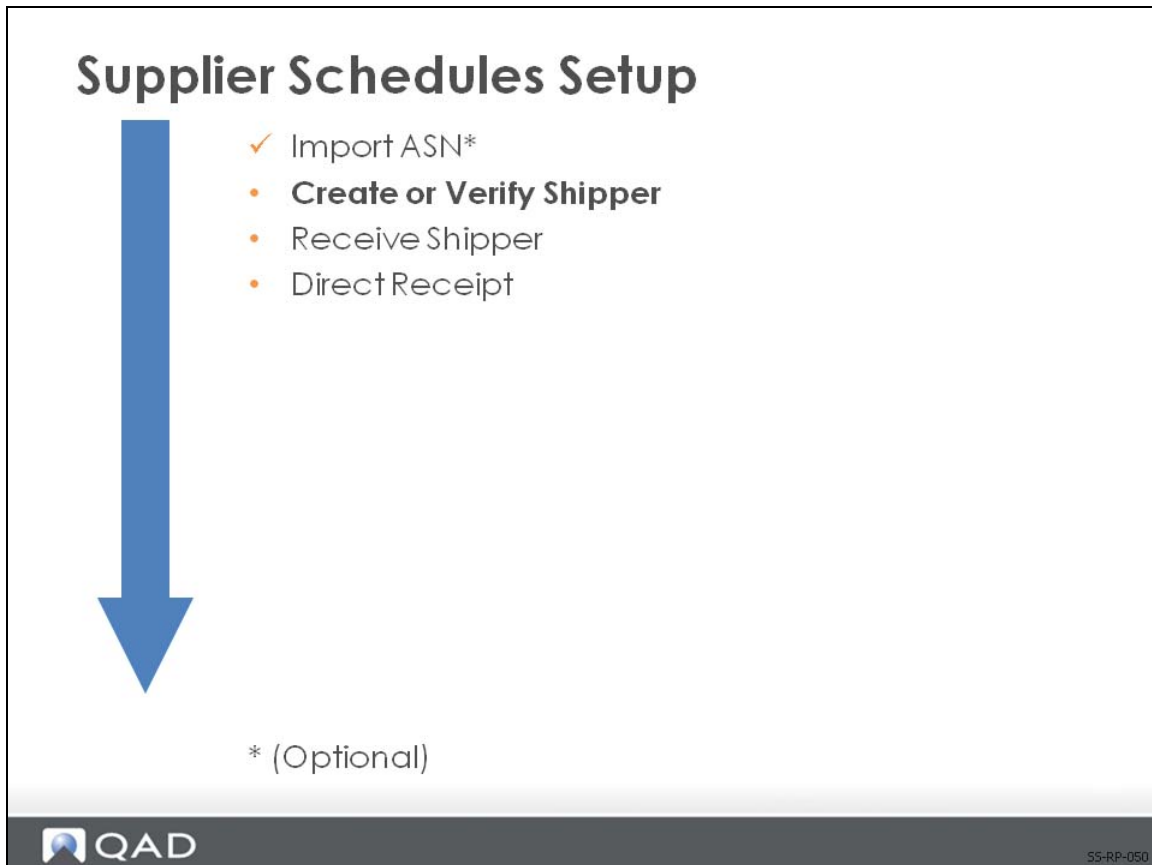
Back Next

QAD SS-RP-040

Use Document Import (35.1) to import the ASN. Document Import locates and opens EDI-transmitted documents, in this case the ASN. It then takes the data and converts it into a data format able to be recognized by QAD Enterprise Applications. The ASN is then ready to be processed.

The system generates a report on the import process.

Create or Verify Shipper



You can create a shipper using the documentation accompanying the shipment. A shipper itemizes the items and quantities in the shipment. Sometimes you also need to track the shipping containers.

You can receive container information electronically as part of an ASN or the information may arrive with the shipment and be entered manually. Container information may also be scanned into the system from bar code readings of shipping labels.

PO Shipper Maintenance (5.5.5.5)

PO Shipper Maintenance

Supplier: 10-300 Shipper ID: 200 Ship Date: 9/16/2010 Ship-to ID: 10-301

QMI -USA Division
30 Ridgedale Avenue

Ship-to ID: 10-301 Distribution Site 1

Contents (Containers)

Container ID: 100

Delete Back Next

QAD SS-RP-060

Use PO Shipper Maintenance (5.5.5.5) to create a new shipper, to modify, or simply to view an existing shipper. If using ASNs, you can use PO Shipper Maintenance to see and verify the shipment details before you receive and confirm it.

Note You can modify a shipper that has been confirmed. However, you cannot reconfirm modified shippers.

Header Frames

You identify the shipper by entering the supplier code, a shipper ID, and a ship date. The shipper ID can come from:

- ASN already in the system
- Bar code reading of a shipping label
- Entering the number from the receiving document (e.g., picklist)

In the second header frame you enter the site where the shipment is being delivered in the Ship-To field.

Contents (Items) Frame

PO Shipper Maintenance: Contents (Items) Frame

PO Shipper Maintenance

Go To Actions Copy Print Preview Attach

Supplier: 10-300 Shipper ID: 200 Ship-to ID: 10-301

Supplier: 10-300 Ship Date: 9/16/2010 QMI -USA Division
 Shipper ID: 200 30 Ridgedale Avenue

Ship-to ID: 10-301 Distribution Site 1

Contents (Items)

Item Number: bx-0001
 Purchase Order: P1010001 Line: 1

Qty to Receive: 100 UM: EA UM Conv: 1.0000

Site: 10-301
 Location: 100
 Lot/Serial
 Reference
 Supplier Lot
 Multi Entry: ☐

Back Next

QAD SS-RP-070

If you are tracking the shipping containers, enter the container ID.

In this frame you register/record the items that are packed into the shipper or containers.

PO Container Maintenance (5.5.5.4)

Use PO Container Maintenance (5.5.5.4) to link items to containers used by your supplier to ship the items. Containers are not a required part of a shipper, but there are times when you need to keep track of them, if the container has a significant value, for example, or if it needs to be returned. You can also use PO Container Maintenance to modify container item quantities (e.g., the actual shipment does not match the shipper).

- Usually containers are not a concern with supplier schedules

You can receive container information:

- Electronically as part of an ASN
- Along with the shipment (e.g., a packing list) to be entered manually
- From bar code readings of shipping labels

Note To return containers that have been received to a shipper, use Issues – Unplanned (3.7).

In the first frame you identify the supplier and assign a container ID. You can have the system assign a container ID or you can enter one.

The container you are identifying at this point is the parent container, the container holding the shipped items. In some cases this can also include other containers.

In the next frame you identify the ship-to location: (The location where the container is being delivered)

In the last frame you enter the container item information.

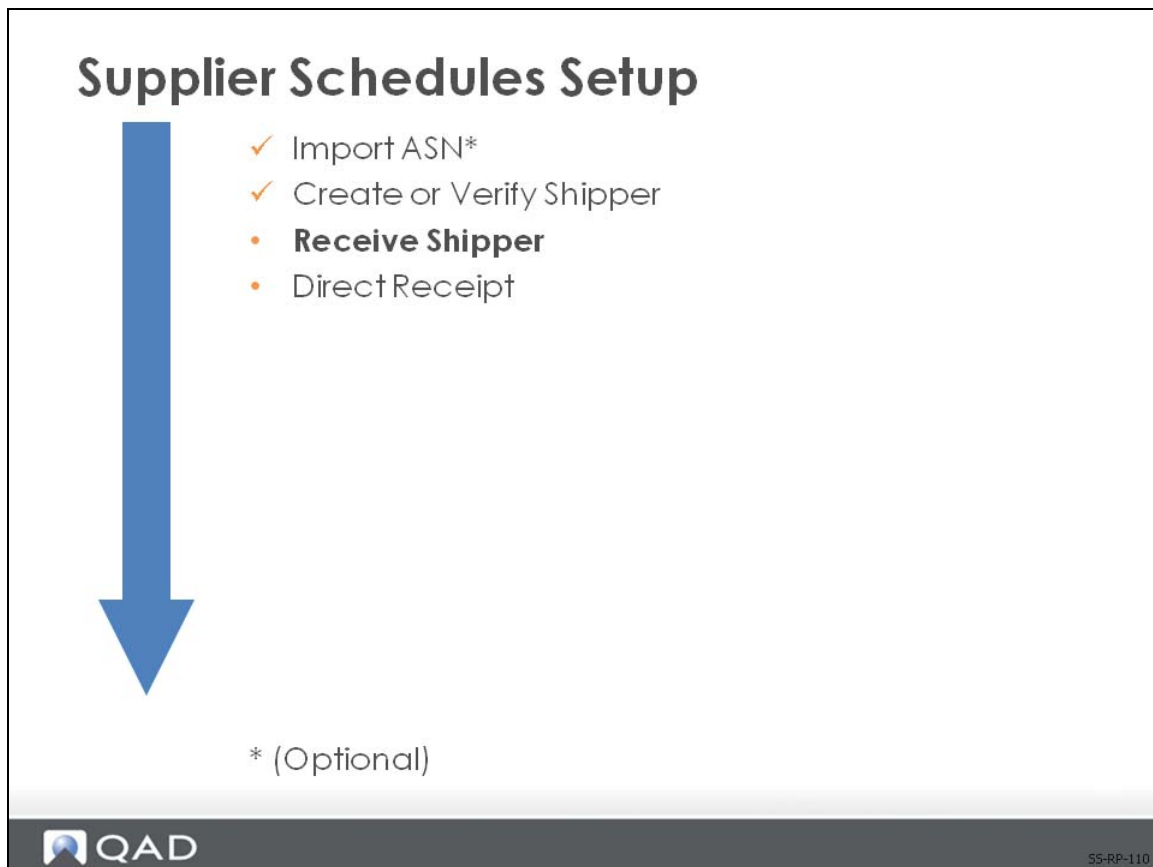
Exercise: Receiving the Supplier Schedule

Receive the first shipment on your schedule order.

- 1 Enter your supplier. Use 100 for the Shipper ID and today's date for the Ship Date. Click next and enter 10-100 for the Ship-to ID.
Use PO Shipper Maintenance (5.5.5.5)
- 2 Advance to the Contents (Items) frame. From the Container Frame click Back to advance to the contents (Items) frame. Receive a quantity of 100.

Note This activity sets up the shipper to be received; the actual receipt occurs in the next activity.

Receive Shipper



The last step in the receiving process is to receive and confirm the shipper.

Receiving the shipper:

- Increases inventory
- Increases the cumulative received quantities
- Decreases net cumulative requirements
- Updates the accounts payable (AP) and GL accounts

PO Shipper Receipt (5.5.5.11)

PO Shipper Receipt

The screenshot shows a software window titled "PO Shipper Receipt". At the top is a menu bar with "Go To", "Actions", "Copy", "Print", "Preview", and "Attach". Below the menu bar, there are two tabs: "Supplier: 10-300" (selected) and "Inventory Movement Code:". The main form area contains the following fields:

- Supplier: 10-300
- Shipper ID: 200
- GL Effective Date: 9/16/2010
- Shipment Information section with:
 - Shipper Number: [text box]
 - Ship Date: 9/16/2010
 - Inventory Movement Code: [text box with search icon]

At the bottom right of the form are "Back" and "Next" buttons. The QAD logo is in the bottom left corner, and "SS-RP-120" is in the bottom right corner.

Use PO Shipper Receipt (5.5.5.11) to record that the supplier has fulfilled all or part of their commitment by delivering the ordered materials.

Exercise: Receive Shipper

Receive and confirm the shipper and check inventory.

- 1 You are going to receive and confirm the shipper. Let the Effective date default to today's date. Use PO Shipper Receipt (5.5.5.11)
- 2 When the system prompts, confirm the update.
- 3 Print another copy of your schedule, this time take note of any differences.
Use Schedule Print (5.5.3.8)
- 4 Check to see if your item number has been received into inventory.
Use Inventory Detail by Item Browse (3.2) or Inventory Detail by Site Browse (3.3)
- 5 Review the audit trail for the inventory transaction.
Use Transactions Detail Inquiry (3.21.1)

Direct Receipt

Supplier Schedules Setup



- ✓ Import ASN*
- ✓ Create or Verify Shipper
- ✓ Receive Shipper
- **Direct Receipt**

* (Optional)

SS-RP-140

If you are not receiving ASNs or reading bar code labels and exploding containerized shipments, you can use the receiving function for the Purchase Order module. Cumulative quantities are updated, so there is no loss of functionality.

Purchase Order Receipts (5.13.1)

Purchase Order Receipts

Purchase Order Receipts X

Go To Actions Copy Print Preview Attach

Order: P1010001

Supplier: 10-300

Status:

Effective: 9/16/2010

Packing Slip:

Receiver: QMI -USA Division

Move to Next Operation: ☒

Receive All: ☐

Comments: ☐

Ship Date:

Back

Next

QAD

SS-RP-150

Use Purchase Order Receipts (5.13.1) to enter the receipt of your shipment directly into inventory.

Header Frame

In this frame you identify the schedule order shipment being received.

Line Item Detail Frame

Purchase Order Receipts: Line Item Detail Frame

The screenshot shows a software window titled "Purchase Order Receipts". It has a menu bar with "Go To", "Actions", "Copy", "Print", "Preview", and "Attach". Below the menu bar, there are fields for "Unit of Measure: EA", "Site: 10-301", and "ID:". The main area contains a table with the following data:

Ln	Item Number	UM	Qty Open	UM	Receipt Qty	UM	Project	Due Date
1	bx-0001	EA	0.0	EA	0.0	EA		
2	bx-0001	EA	0.0	EA	0.0	EA		

Below the table is a detailed form for "Line: 1". It includes fields for "Unit of Measure: EA", "Site: 10-301", "Loc: 100", "Quantity: 0.00000000", "ID:", "Lot/Ser:", "Packing Qty: 0.0", "OP: 0", "Reference:", "Supplier Lot:", "Item Number: bx-0001", "Supplier Item: Box100", "Multi Entry:", "Chg Attribute:", "Cancel B/O:", and "Cnmts:". At the bottom right are "Back" and "Next" buttons.



SS-RP-160

The top frame displays the line items and quantities open on the scheduled order. In the lower frame you enter specific line item detail.

- You can receive against open line items only
 - Open line items have a nonzero quantity open (Qty Open) and a blank line-item status (Status)
- You cannot receive against line items that are closed or cancelled (Status C or X)

Trailer Frame

Purchase Order Receipts: Trailer Frame

Order: P1010001	Supplier: 10-300	Status:	Packing Slip:
-----------------	------------------	---------	---------------

Non-Taxable:	0.00	Currency: USD	Line Total:	0.00
Taxable:	0.00		Total Tax:	0.00
Tax Date: 9/16/2010			Total:	0.00

View/Edit Tax Detail ☐

Back Next

QAD SS-RP-170

The last frame displays tax and pricing information along with the currency used on the scheduled order: (Display only)

Supplier Setup Summary

Supplier Schedules Setup Summary



- ✓ Import ASN*
- ✓ Create or Verify Shipper
- ✓ Receive Shipper
- ✓ Direct Receipt

* (Optional)

Course Overview

Course Overview

- ✓ Introduction to Supplier Schedules
- ✓ Business Considerations
- ✓ Set up Supplier Schedules
- ✓ Process Supplier Schedules
- ✓ Process Supplier Schedules Receipts

Chapter 6

Special Processes

Managing Cumulative Quantities

Managing Cumulative Quantities

QAD Enterprise Applications gives you the ability to:

- Modify cumulative receipt quantities for a scheduled order
- Reset an entire scheduled order with a new cumulative start date and zero quantity
- Reset the cumulative totals for one or more supplier schedules



SS-SPPR-010

Cumulative Received Maintenance (5.5.5.13)

Cumulative Received Maintenance

Purchase Order: P1010001 Supplier: Ship-To:

Item Number: Line: 1 UM:

Supplier: Ship-To:

Back Next

QAD SS-SPPR-020

Use Cumulative Received Maintenance (5.5.5.13) to modify cumulative received quantity for the supplier schedule line or reset an entire scheduled order with a new Cum Start date and a zero (0) quantity.

Note New cumulative quantity is transmitted on the next schedule release.

There are two frames.

In the first frame you select the scheduled order by specifying the:

- Purchase Order (scheduled order number)
- Item
- Supplier
- Ship-To
- Line
- In the second frame you designate how you want to modify the cumulative received quantity.

Note It is recommended that this program be password-controlled.

Cumulative Received Reset to Zero (5.5.5.14)

Cum Received Reset to Zero



SS-SPPR-030

Use Cum Received Reset to Zero (5.5.5.14) to reset the cumulative totals for supplier schedules. You can reset one supplier schedule or a range of supplier schedules. The reset process generates a report showing which scheduled orders were reset and what their cumulative received totals were before being reset.

Note You can run the reset process in batch mode.

Appendix A

Workshops and Study Questions

Supplier Schedules Setup Workshop

Situation:

You operate a company that makes juice drinks. One of the products that you purchase are the bottles for the drinks. For this product you have two suppliers.

- 1 Select two suppliers.
Record the supplier codes: _____
What program do you use to create the suppliers?
- 2 Create a purchase part number for the bottles.
Record the site: _____
What program do you use to create the part? What field tells the system it is a purchased part?
- 3 Set up supplier item numbers for your item numbers.
Record the supplier item number: _____
What program do you use?
- 4 Set up a price list for each of your suppliers
Make the price list code the same as the supplier codes.
Which program do you use for this?
- 5 Add the price list code to the supplier information.
What program do you use to do this? Which field?
- 6 Set up a calendar for each of your suppliers. Make one supplier have every Friday as a non-work day and the other one have every Wednesday as a non-work day. How do you indicate a non-work day?
- 7 Set up a scheduled order for each supplier.
 - a Record each order number: _____
 - b Accept the defaults in the Order Data frame. You want to be able to print the schedules. What field do you have to check?
 - c In the first Order Line Item Data frame, enter the price list code. Accept the remaining defaults.
 - d In the second Order Line Item Data frame enter the following:

Field	Data
Firm Days:	0
Schedule Days:	14
Schedule Weeks:	6
Schedule Months:	6
Fab Auth Days:	30
Raw Auth Days:	60

Field	Data
Ship/Dlvy Pattern:	20
Standard Pack Qty:	<different for each supplier>

What program do you use and what field must be set to Yes?

- 8 Input a 16 week forecast for the item, starting next week. Be imaginative with your numbers.
What program do you use?
- 9 Run selective MRP for your item number and site. Accept the defaults.
What program do you use?
- 10 Where can you check the results? What type of orders should you see?
- 11 The scheduled order is to be shared between your two suppliers. How do you set this up?

Supplier Schedules Setup Study Questions

- 1 You can use any type of price list for supplier schedules.
True or False
- 2 One of your suppliers shuts down for two weeks every summer. What do you have to do to make sure no orders are scheduled during that two week period?
- 3 You need to set up a supplier calendar for each of your suppliers.
True or False
- 4 If you are ordering more than one item from the same supplier, you need to set up a scheduled order for each item.
True or False
- 5 You want to make sure the orders are shipped in multiples of 25. What do you have to set?
- 6 Since you only have one supplier, you do not need to allocate supply percentages in Scheduled Order MRP% Maintenance.
True or False

Processing Supplier Schedules Workshop

Situation:

You have your MRP-planned purchase orders and are now ready to create the release.

- 1 Create a new supplier schedule release.
What program do you use?
- 2 Review the schedule release. What can you use to do this?
- 3 Print a copy of the schedule release.
What program do you use?

- 4 How does the standard pack quantity affect the orders?

Scheduled Order Processing Study Questions

- 1 List the ways you can transmit a schedule release to your supplier.
- 2 If you are exporting your schedule release, what information do you need to set up before you can export the release?
- 3 You can transmit the schedule release using more than one method.
True or False

Receiving Supplier Schedules Workshop

Situation:

The shipments from both suppliers have arrived and need to be received into inventory.

- 1 Receive each shipment separately using the direct receiving method.
What program do you use?
- 2 Print a copy of the schedule release.
What program do you use?
- 3 Compare this copy to the copy you printed at the time of processing. What is different?
Check the header information.

Receiving Supplier Schedules Study Questions

- 1 List the ways you can receive notification from your supplier that they have shipped your order.
- 2 List the ways you can process the shipment.

Supplier Schedules Setup Workshop: Answers

- 1 Basic address information comes from the Financials setup; use Supplier Data Maintenance 2.3.1 to specify additional details.
- 2 Use Item Master Maintenance 1.4.1, the Pur/Mfg field.
- 3 Use Supplier Item Maintenance 1.19.
- 4 Use Price List Maintenance 1.10.2.1.
- 5 Use Supplier Data Maintenance 2.3.1. Enter the price code in the Supplier Pricing Data frame, Disc Tbl field.
- 6 Use Supplier Calendar Maintenance 5.5.1.1. Set the weekday in question to No under Work Day and 0 under Hours.
- 7 Use Supplier Scheduled Order Maintenance 5.5.1.13.

Print Schedules must be set to Yes.

- 8** Use Forecast Maintenance 22.1.
- 9** Use Selective Materials Plan 22.3.
- 10** Use MRP Summary Inquiry 22.13 or MRP Detail Inquiry 23.16. You should see planned orders (designated as work orders).
- 11** Use Scheduled Order MRP% Maintenance 5.5.1.17. Assign a percentage to each order.

Supplier Schedules Setup Study Questions: Answers

- 1** False. Price tables (type L) are not used for supplier schedules.
- 2** Set up a supplier calendar using Supplier Calendar Maintenance 5.5.1.1. In the Operating Day Hour Exceptions frame, define the beginning and ending dates of the shut down period.
- 3** False. If a supplier calendar is not set up, the system uses your shop calendar.
- 4** False. You can use the same scheduled order, just add a line item for each item you are ordering from the supplier.
- 5** You need to set the Std Pack Qty (Standard Pack Quantity) field in Supplier Scheduled Order Maintenance 5.5.1.13. To ship in multiples of 25, you set the field to 25.
- 6** False. Allocate 100% to the order.

Processing Supplier Schedules Workshop

- 1** Use Schedule Update from MRP 5.5.3.1.
- 2** Use Schedule Maintenance 5.5.3.3 or Schedule Inquiry 5.5.3.4.
- 3** Use Schedule Print 5.5.3.8.
- 4** Open quantities are adjusted accordingly.

Scheduled Order Processing Study Questions: Answers

1

- a Printing and sending a hard copy
- b Faxing
- c Exporting

2 You need to set up the trading partner (i.e., your supplier) information in Trading Partner Parameters Maintenance 35.13.10.

3 True. As long as the appropriate parameters are set.

Receiving Supplier Schedules Workshop: Answers

1 Use Purchase Order Receipts 5.13.1.

2 Use Schedule Print 5.5.3.8.

3 The Receipt Date, Receipt Qty, and Cum Received fields show the results of the receive transaction.

Receiving Supplier Schedules Study Questions: Answers

1

- a ASN.
- b The actual shipment and accompanying documents.

2

- a Import, verify, and confirm the ASN.
- b Create and confirm the shipper.
- c Direct receipt.

Appendix B

Reports, Inquiries, Browsers

Supplier Schedules Inquiries and Browsers

Menu	Inquiry	Function / Purpose
5.5.1.2	Supplier Calendar	Browse Displays information for all suppliers having a custom calendar. Shown are the work day hours for Sunday through Saturday.
5.5.1.14	Scheduled Order Inquiry	Displays information by scheduled order line item. Information shown includes order data and order line item data information.
5.5.1.18	Scheduled Order MRP% Browse	Displays information for all ship-to locations. Information shown includes the item number, effective date, purchase order number, and percent allocated.
5.5.3.4	Schedule Inquiry	Displays information by scheduled order. You have the option of displaying the net required quantity for the scheduled order. Information shown includes Prior Cum Req, Prior Cum Date, and the Schedule Detail Data.
5.5.3.5	Schedule History Inquiry	Displays information by scheduled order. You have the option of specifying a Created After date. Only scheduled orders created after this date display. Information shown is the same as in Schedule Inquiry.
5.5.5.6	PO Shipper/Container Inquiry	Displays information by supplier and shipper/container ID. Information shown includes the ship-to, identification number, site, item number, location, order number, line number, and the quantity received.
23.13	MRP Summary Inquiry	Displays information by item number and site. Information shown includes the item's item planning data, and due date and quantity information for gross requirements, scheduled receipts, projected quantity on hand (QOH), planned orders due, and planned orders released.
23.16	MRP Detail Inquiry	Displays information by item number and site. Information shown includes the item's item planning data, and due date, gross requirements, scheduled receipts, projected QOH, planned orders, and order details (e.g., work order number, release date).

Supplier Schedule Reports

Menu	Inquiry	Function / Purpose
5.5.1.15	Scheduled Order Report	Selection criteria includes supplier scheduled order details (order number, item number, supplier, ship-to). Report information includes scheduled order data and order line item data. The format of the report is the same as the screen format of Supplier Scheduled Order Maint (5.5.1.13), where the data was originally entered.
5.5.3.13	Schedule Report	Selection criteria includes supplier scheduled order details (order number, item number, supplier, ship-to, release ID). You have the option of receiving information for active or historical schedules. Report information includes Prior Cum Req, Prior Cum Date, Schedule Detail Data, and Resource Authorization Data.
5.5.3.15	Schedule Comparative	Selection criteria includes order number, item number, supplier, ship-to, and two release IDs. The report compares the quantities, discrete and cumulative, between the two specified releases.
5.5.3.17	Schedule Authorization Report	Selection criteria includes supplier scheduled order details (order number, item number, supplier, ship-to). Report information includes release ID number, effective dates, and resource authorization information.
5.5.5.1	Schedule Summary Report	Selection criteria includes supplier scheduled order details (order number, item number, supplier, ship-to). Report information includes due dates, workdays, net quantity due, and cumulative quantity due.
5.5.5.15	Receipt History Report	Selection criteria includes supplier scheduled order details (order number, item number, supplier, ship-to). Report information includes receipt date and time, transaction type and number, site, location, receipt quantity, and cumulative quantity.

