



QAD Enterprise Applications

User Guide

QAD Supplier Portal

QAD Supplier Portal 13.15
March 2019

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Change Summary

The following table summarizes significant differences between this document and previous versions.

Date/Version	Description	Reference
March 2019/Supplier Portal 13.15	Rebranded for version 13.15	--
September 2018/Supplier Portal 13.14	Updated the <code>gen.itempolicy.input</code> file format	page 266
April 2018/Supplier Portal 13.13	Rebranded for version 13.13	--
October 2017/Supplier Portal 13.12	Rebranded for version 13.12	--
March 2017/Supplier Portal 13.11	Rebranded for version 13.11	--
September 2016/Supplier Portal 13.10	Corrected the descriptions of the ASN status icons	page 17 page 71 page 72
	Updated description of how arrears are calculated	page 129
March 2016/Supplier Portal 13.9	Added field description for new field, ASN Serial Number editable for suppliers	page 156
November 2015/Supplier Portal 13.8	Rebranded for version 13.8	--
March 2015/Supplier Portal 13.7	Added field description for new Extract UDF and PO Ack Policy field	page 153
	Added new section on Reset Exported ASN Status	page 260
	Added new section on Export User-Defined Fields and PO Acknowledgments	page 261
	Various updates to adjust menu paths due to new Admin Data Management menu.	--
January 2015/Supplier Portal 13.6	Added new field description for ASN Line Remark	page 73
	Added new section on System Monitoring	page 165
	Added new section on Setting Up System Monitoring for a User	page 172
	Added new section on Partners Maintenance	page 173
October 2014/Supplier Portal 13.5	Updated information on supported browser versions	Throughout
	Added descriptions of new fields available in ASNs View's Header & Lines frames	page 73
	Added description of new ASN Serial Number Policy field	page 152
	Added descriptions of new ASN Serial Number format and ASN Serial Number maximum allowed length fields	page 155
August 2014/Supplier Portal 13.4	Added description of Quantity Qualifier selection	page 62
July 2014/Supplier Portal 13.3	Added description of Update Cum Receipt Qty Method policy	page 152

Date/Version	Description	Reference
	Added information on Additional Poller User menu option	page 178
April 2014/Supplier Portal 13.2	Product name change	throughout
March 2014/SCP 13.2	Minor fixes and updates	throughout
November 2013/SCP 13.1	Added information on Draft Invoices	page 84
September 2013/SCP 13	Modifications throughout	--
March 2013/SCP 12.2	Rebranded for version 12.2	--

Overview

This section discusses the following topics:

Introduction to QAD Supplier Portal **2**

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Introduction to QAD Supplier Portal

QAD Supplier Portal is a QAD Internet-based service supporting vendor-managed inventory. QAD hosts and maintains QAD Supplier Portal.

For customers, QAD Supplier Portal uses a small code module, a poller, to periodically send inventory information securely over the Internet for storage in the QAD Supplier Portal database. QAD Supplier Portal supports a direct connection to MFG/PRO versions 7.3 through 9.0 as well as MFG/PRO eB, eB2, and eB2.1, as well as QAD Enterprise Applications Standard Edition and Enterprise Edition. QAD Supplier Portal also supports XML integration with other ERP systems. For users who can browse the Internet from inside their company, QAD Supplier Portal implementation requires no changes to the corporate firewall.

For suppliers, QAD Supplier Portal is a window. Through this window, they have a direct, real-time view of customer inventory and order data. Suppliers need only a Web connection and Internet browser; they do not need any additional software.

Advantages of Vendor-Managed Inventory

Vendor-managed inventory in QAD Supplier Portal provides value to both customers and suppliers.

For customers, placing full responsibility on suppliers for maintaining inventory at customer sites simplifies and optimizes the supply chain. It also reduces customer inventory costs and management requirements.

For suppliers, using QAD Supplier Portal to maintain inventory levels at customers' sites is cost effective. Stock can be optimized across multiple customers in a geographic area and moved among those customers and sites in response to fluctuating demand. Closely monitored item consumption is a more effective measure of customer inventory than forecasts. It also circumvents problems created by lost, delayed, or rerouted shipments. Based on observed item consumption, suppliers determine the timing and volume of shipments required to replenish stock.

Operation Overview

The core of QAD Supplier Portal is the Min/Max view, which summarizes the relationship between a customer and a supplier. Suppliers see the inventory level per site of the items that they supply to the customer. The display includes current inventory, required minimum and maximum levels, average usage, and the expected inventory level when the next shipment arrives.

Details available on each item include shipment history and cumulative totals. Display colors and icons alert viewers to problems in inventory levels or status. The display can be sorted by status: item quantities shown in red are below the minimum while item quantities shown in blue are above the maximum.

At the QAD Supplier Portal Web site, customers:

- Maintain company and supplier identification data.
- Specify which suppliers can access inventory information for which items at which locations.
- Review company inventory.
- Review advance ship notices (ASNs) and enter receipts.

At the QAD Supplier Portal Web site, suppliers:

- Log in using a unique customer-supplied user name and password that determines which items they are allowed to view.
- Review customer inventory levels for items and sites.
- Enter and review ASNs.

QAD Supplier Portal reconciles supplier-entered ASNs against customer-entered receipts. The results, with differences flagged for attention in the Min/Max view, are accessible to both customers and suppliers.

QAD Supplier Portal provides a clear representation of the customer/supplier context by displaying the customer/supplier logo and name on most displays.

Browser and Data Security

For customer security, the poller initiates communication with the QAD Supplier Portal Web site. This browser-like behavior poses no risk of virus or attack to the customer's system.

QAD Supplier Portal protects the confidentiality of customer data by requiring that suppliers provide a customer-maintained user name and password to access the QAD Supplier Portal Web site, to view the inventory, and to access customer reports.

For secure browser sessions, customers and suppliers can use Secure Sockets Layer—https—when accessing QAD Supplier Portal.

Kanban Production Control

Kanban is a Japanese method of production and inventory control that was first developed and used at Toyota. It is the predecessor of the Just in Time (JIT) approach to inventory control.

Designed for day-to-day use on the manufacturing floor, kanban relies on a series of control triggers, typically in the form of cards that are associated with containers. The control-trigger cards are the signal for required activities such as moving full containers and filling empty containers.

The kanban cards are organized into loops that represent the flow of containers of material between supplying locations and holding or consuming locations. Full containers—with a card that indicates production—flow to consuming locations while empty containers—with a card that indicates replenishment—flow to supplying locations.

Production is managed by demand calculations that determine the optimum number of items in each container represented by a card—a kanban—and the optimum number of kanbans for each loop.

Kanban Functionality in QAD Supplier Portal

With kanban functionality in QAD Supplier Portal, users can see at a glance the status of each card and loop, including the number of full and empty kanbans, the order point and safety stock requirements for the loop, and the most recent transaction reported on each card. Each of the views can be customized by selecting columns to display and filtering on data values.

The views are available to all users. The admin functions, with the exception of User Maintenance, are available to only admin users. Admin users can specify the security group for each user in User Maintenance.

Kanban Board View. The Board view default display includes the basic defining information for each kanban loop—supplying source, consuming destination, and so on—as well as card status and inventory status for each loop.

Kanban Loop View. The Loop view default display includes extensive defining information for each kanban loop, such as card type and loop size.

Kanban Card View. The Card view default display includes extensive defining information for each kanban card, such as ID, card type, and last transaction details.

Administration. There are screens for maintaining company, user, contact, and supplier account information. For customer admin users there is also a screen for specifying which loops should be visible in the views.

QAD Supplier Portal Support

For the most current information on support for QAD Supplier Portal, go to:

<http://support.mfgx.net/index.jsp>

In the QAD Supplier Portal interface, there is also a Support link always available in the Help menu. Through this link, QAD customers can access the Incident Management system or request information from QAD Global Services.

QAD Implementation Services

The QAD implementation services team offers a range of consulting services from pre-installation planning, through project layout and design, execution, systems roll-out, and on-going consulting. For more information, see:

<http://support.mfgx.net/services>

Interface

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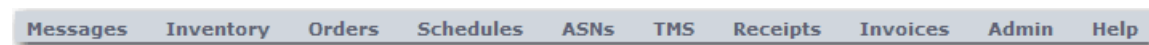
Overview

Display Languages

Languages. In addition to English, the interface is available in several languages (see “Display Languages”).

Menu

Links. Regardless of what tab, view, or screen is in use, these links are always available at the top of the QAD Supplier Portal display.



Tabs, Views, and Screens

Display. The interface is organized into tabs, views, and screens.

Data

The Data tab/subtab displays the various types of data. Users can manipulate the display but cannot input data. See the individual items under Views and Details for more information.



Filter

Use the Filter tab/subtab to refine the filter criteria for the Data tab/subtab display (see “Filter Tab and Subtab”).



Display

Use the Display tab/subtab to refine the displayed columns for the Data tab/subtab display (see “Filter Tab and Subtab”).



Print

Use the Report subtab on the Print tab to generate data reports in Acrobat PDF, comma-separated value (CSV), or symbolic link (SLK) format for viewing or saving to a file. From the Print tab on the Min/Max and Kanban Board views, you can also generate a consigned inventory history report (see “Consigned Inventory History Reports”).



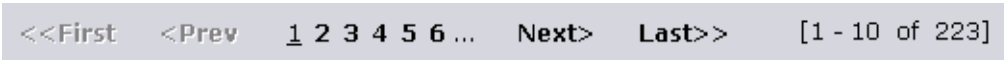
Alerts

Use the Alert tab to set alerts and notifications to monitor data for critical inventory events (see “Alerts and Notifications”).



Navigating Among Data Pages

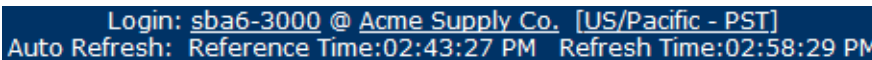
The Data tab displays methods for moving among view pages: page numbers and sequential Link:



- Use the page navigation numbers to jump to any specific page. The navigation numbers increase or decrease to match the actual number of pages available. When there are more pages to display than numbers visible, the numbers will increment/decrement as they are clicked.
- Use the sequential links to move forward or backward sequentially among the pages or to jump to the first or last page.

ID Bar

The ID bar is at the top of the QAD Supplier Portal display.



From the ID bar, users can display company information, change passwords, define nonadmin users, review time zone definitions, and store a time zone in the QAD Supplier Portal database. See the individual items under General, Customer and Supplier Tasks for more information.

Side Bar

The Side bar is at the left of the QAD Supplier Portal display.

The Side bar contains navigation and display control tools.

See “Sidebar: History, Workspaces, Appearance” for more information.

Auto Refresh

Use the Auto Refresh field in Admin » User —User tab, Preferences subtab—to enable automatic data refreshing and change tracking at 15-minute intervals in these views:

- Inventory: Min/Max and Kanban Board
- Orders
- Schedules
- ASNs
- Invoices

Although the poller updates the data in the QAD Supplier Portal database periodically unless auto refresh is enabled, the data views are updated only when opened by users.

QAD Supplier Portal tracks data changes from a reference point in time and highlights rows where the poller updates any displayed data since that reference point. The original reference point is the time when the user displayed the screen; the data displayed at that time is the reference data. Even if there are no further changes during subsequent data refreshes, the changed data rows remain highlighted until the reference point is reset.

The reference point and the most recent refresh time are shown in the ID bar at the top of the QAD Supplier Portal display for the supported views. Only one set of times is maintained for all of the views. If the user's time zone is not specified, the displayed time will be in the server's default time zone.

The following activities refresh the data and set/reset the reference point:

- Navigating to an auto refresh-enabled screen for the first time during a session
- Navigating away from the current auto refresh-enabled data screen to another auto refresh enabled data screen
- Changing the sort order of the columns
- Changing page size
- Clicking the pagination buttons
- Changing the filter
- Changing the auto refresh preference
- Clicking the Reset Reference icon (see “Flags and Icons”)
- Ending the user session

Display Languages

In addition to English, QAD Supplier Portal can be viewed and used in a number of languages.

User Interface

QAD Supplier Portal displays interface labels in these languages:

- Chinese (Simplified)
- Chinese (Traditional)
- Czech
- Dutch
- English
- French
- German
- Italian
- Japanese
- Korean
- Latin

- Norwegian
- Polish
- Portuguese (Brazilian)
- Russian
- Spanish (Castilian)

Regardless of the language selected for displaying the interface labels, the language used to display the data does not change.

Data in QAD Supplier Portal

QAD Supplier Portal accepts input, stores, and displays data in these languages:

- Dutch
- English
- French
- German
- Italian
- Portuguese
- Spanish (Castilian, Latin)

Note Changing the display language for the interface labels in QAD Supplier Portal does not change the language used to display the data.

Changing the Interface Labels Language

The browser controls the language and encoding that is used in the display.

- 1 On the browser Tools menu, click Internet Options.
- 2 On the General tab, click Languages.
- 3 If the required language is available, skip this step.
 - a If the required language is not available, click Add.
 - b In the Add Language dialog, select a language and click OK.
- 4 In the Language Preferences dialog, select the preferred language.
- 5 Click Move Up until the new language is at the top of the list, then click OK.
- 6 Click OK to close Internet Options.
- 7 If no language encoding changes are required, skip this step.
 - On the View menu, point to Encoding and point to a language, or
 - Point to More to display additional languages and click a language to add it to the Encoding menu. It will be the selected encoding.
- 8 Click Refresh.

Browser Security

For QAD Supplier Portal subscriber security, the poller initiates communication with the QAD Supplier Portal Web site. This browser-like behavior poses no risk of virus or attack to the subscriber's system.

QAD Supplier Portal protects the confidentiality of subscriber data by requiring that suppliers provide a user name and password to access the QAD Supplier Portal Web site. User account security is managed through the QAD Supplier Portal database.

QAD Supplier Portal subscribers control access to their data by enabling supplier accounts and by specifying which data is visible. Suppliers can only view information; they can never directly or indirectly alter information in the subscriber's ERP system.

For secure browser sessions, subscribers and suppliers can use Secure Sockets Layer—https—when accessing QAD Supplier Portal:

- Directly: <https://www.MFGx.net/sv/>
- Through <https://www.MFGx.net>

Browsers, Connections, and Logging In

Browser Version

Logging in to QAD Supplier Portal requires a browser for access to the Internet as well as a QAD Supplier Portal account. Subscribing to QAD Supplier Portal creates an account, user name, and password.

Browser Versions Supported. Internet Explorer through version 11 and Google Chrome up to most recent versions. Contact the Support team for browser version issues.

Connection Types. Access the QAD Supplier Portal through either a normal (http) or secure (https) browser connection.

Logging In

- 1 Enter <http://www.mfgx.net/sv/> in the browser Address box to open the QAD Supplier Portal Network Password dialog.
- 2 Enter the QAD Supplier Portal user name and password, then click OK to launch QAD Supplier Portal.
 - Customer admin: QAD provides the user ID and original password.
 - Customer non-admin and Supplier admin: Customer admin provides the user ID and original password.
 - Supplier non-admin: Supplier admin provides the user ID and original password.

Accounts, User Names, and Passwords

Only accounts that have been assigned to the admin and non-admin security groups can access QAD Supplier Portal through the browser user interface.

If you are having problems with your user name or password, use this list to determine who is most likely to have the information you need.

- Customers define their master admin user name and password during the QAD Supplier Portal subscription process.
- Customer admin users define the master admin account user name and password for each of their suppliers.
- Customer and supplier master admin users define the user name and initial password for subsequent admin accounts in their respective companies.
- Any admin user can define additional admin and non-admin user accounts.
- For more information on security groups, see the User help page after you log in.

User-Defined Fields

User-defined fields are available for the Min/Max, Kanban Board, Orders, and Schedules data views. Each view can have up to 120 of these fields with labels defined by customer admin, consolidated customer admin, and consolidated supplier users. Customers can see up to 120 fields and suppliers can see up to 90 fields.

The available fields include:

- 10 text fields visible to customers only and 10 visible to customers and suppliers.
- 10 text fields visible to customers and suppliers, but editable only by customers.
- 10 text fields visible to customers and suppliers, but editable only by suppliers.
- 10 numeric fields visible to customers only and 10 visible to customers and suppliers.
- 10 numeric fields visible to customers and suppliers, but editable only by customers.
- 10 numeric fields visible to customers and suppliers, but editable only by suppliers.
- 10 date fields visible to customers only and 10 visible to customers and suppliers.
- 10 date fields visible to customers and suppliers, but editable only by customers.
- 10 date fields visible to customers and suppliers, but editable only by suppliers.

Customer-supplier field labels defined by customer admin or consolidated customer admin users are visible to customer, customer admin, supplier, and supplier admin users. Customer-only field labels defined by customer admin users are visible to customer and customer admin users.

Customer-supplier field labels defined by consolidated supplier admin users are visible to supplier and supplier admin users.

Use the Display tab to specify which of the user-defined fields to include in the data view. On the Filter tab, select data to display by values in the user-defined fields.

User-Defined Field Labels

Use the User Labels subtab in Admin » Company Maintenance to define labels for user fields. For each of the relevant data views, specify text, numeric, and date field labels as needed.

User-Defined Field Data

For each record in the relevant data views, click the User-Defined Data icon in the right-hand column to open the User-Defined Data maintenance screen. You can enter a value in any of the fields whether or not it has a user-defined label.

Loading User-Defined Field Data into QAD Supplier Portal

You can have the poller load data for user-defined fields into QAD Supplier Portal. For more information, see the Integration Kit online help (the VMI Data Integration Guide or XML Integration Guide for Kanban).

Defining Workspaces

A named workspace holds the most recently displayed (last) view and the current configuration of the views.

Each display change among data views and maintenance screens is recorded in the session history. (See the History area in the left pane of the QAD Supplier Portal window.) When a user's session times out or a user logs out or selects a different workspace to be active, QAD Supplier Portal saves the most recent eligible display—menu-selected, non-Admin, non- screen—as the last view in the current workspace. If there is no eligible display in the history, the last view is not changed. When a user logs in to QAD Supplier Portal or selects a different workspace, QAD Supplier Portal displays the last view for the workspace. The default last view is Inventory » Min/Max.

Each change to a view—row sorting, Filter tab, or Display tab—is automatically saved in the active workspace. For example, a workspace could include the Kanban Board and Loop views configured with all loops for a particular supplier and the Card view configured with all cards for that supplier.

You can define named workspaces, update workspace names, export a workspace to a file, import a workspace from a file, reset a workspace to its default view, and switch among workspaces during a session.

The Active list box in the Workspaces area of the left pane of the QAD Supplier Portal window shows all the defined workspaces. To switch to a different workspace, select the workspace name from the Active list box in the Workspaces area of the task bar. Each new work session starts with the active workspace from the previous session.

Define Workspace Names

- 1 If the left pane with the Workspaces area is not visible in the QAD Supplier Portal window, click the arrows along the left border of the Data display to open it.
- 2 In the Workspaces area, click New/Edit to display the Workspace Maintenance dialog.
- 3 Click New Workspace to display the Workspace tab.
- 4 Enter the name of your new workspace and click Save. To define multiple workspace names, click New again, enter another name, and click Save. Repeat as needed.
- 5 Click Close when all desired workspace names are defined.

Update Workspace Names

- 1 In the Workspace area, click New/Edit to display the Workspace Maintenance dialog.
- 2 On the Search tab, click the workspace name of interest.
- 3 On the Workspace tab, update the name and click Save.
- 4 Click Close.

Export Workspaces

Use the Export button on the Workspace Maintenance dialog screen to save your workspace configuration in a portable file. This lets you back up your configuration or share (distribute) your configuration with other users. There are no security considerations in exporting workspace configurations.

- 1 If the left pane with the Workspaces area is not visible in the QAD Supplier Portal window, click the arrows along the left border of the Data display to open it.
- 2 In the Workspaces area, click New/Edit to display the Workspace Maintenance dialog.
- 3 Click the workspace you want to export.
- 4 Click the Export button.
- 5 Click the Save button. The system prompts you for where you want to save the file.
Note You can change the workspace file name here before saving it.
- 6 Click Close to complete the upload.

Import Workspaces

Use the Import button on the Workspace Maintenance dialog screen to import a new workspace. There are no security considerations in importing workspace configurations.

- 1 If the left pane with the Workspaces area is not visible in the QAD Supplier Portal window, click the arrows along the left border of the Data display to open it.
- 2 In the Workspaces area, click New/Edit to display the Workspace Maintenance dialog.
- 3 Click the Import button.
- 4 Click the Browse button to select the file you want to import.
- 5 Click Upload. The system prompts you to name and save the file.
Note In order to replace an existing workspace with an imported workspace, you must first delete the targeted workspace, then import the workspace specifying the same workspace name.
- 6 Click Save to complete the import and add the new workspace to your workspace listings.

Reset Workspaces

- 1 If the left pane with the Workspaces area is not visible in the QAD Supplier Portal window, click the arrow across from the Workspaces text.
- 2 In the Workspaces area, click New/Edit to display the Workspace Maintenance dialog.
- 3 Select from the list the workspace that you want to reset.
- 4 Click the Options subtab.
- 5 Click the Reset Workspace button.

Note A message displays that the workspace is reset. (The workspace is reset to the default workspace that came with the implementation.)

Display Tab and Subtab



In the QAD Supplier Portal views such as Kanban Board and the QAD Supplier Portal maintenance screens such as Working Data Set, use the tools and previews in the Display tab or subtab to refine the displayed columns for the Data tab or subtab.

- 1 Click the Display tab or subtab to open the Display dialog.
- 2 Select one or more data elements in the Available or Displayed list.
- 3 Click the arrow to move the elements to the desired list.
- 4 Click Apply to view the results of the elements selection in the preview above the Available and Displayed lists.
- 5 Modify the Displayed list as required.
- 6 Click the Data tab or subtab to display the outcome.

Use the Display tab as well as row sorting and the Filter tab to configure views for saving in workspaces.

Note If there is a filter on a column, the filter remains in effect whether or not the column is displayed. For example, if the column Source Type has been filtered for the value Supplier, only the loops with Source Type = Supplier are displayed regardless of whether the Source Type column is displayed.

Note For information on individual fields, see the help page accessible from the Data tab or subtab for the view or maintenance screen: Help » For This Page.

Filter Tab and Subtab



In the views and maintenance screens, use the Filter tab or subtab to refine the filter criteria for the Data tab display. The filter criteria are saved to the current workspace and apply across the various views.

- 1 Click the Filter tab or subtab to open the Filter tab.
- 2 For each column data element, select a relationship such as equal or greater than, then enter a value for filtering the data.
- 3 Click Apply to view the results of the filtering in the preview above the data element list.
- 4 Modify the filter criteria as required, then click Apply.
- 5 Click the Data tab or subtab to display the outcome.

Note If there is a filter on a column, the filter remains in effect whether or not the column is displayed. For example, if the column Source Type has been filtered for the value Supplier, only the loops with Source Type = Supplier are displayed regardless of whether the Source Type column is displayed.

Note The intention of the preview screen in the Filter tab view is to show you a sample view of the data. The Filter tab does not serve the same purpose as the Data tab. The links in the preview screen do not work. You need to go to the Data tab for functional usage.

	The calculator icon activates a calculator application for numeric fields.
	The calendar icon activates a calendar application for date fields. On the Calendar you can select any date or click the Today link to apply the Today filter. The Today filter is a rolling filter; it always filters for the current date in your timezone. For example, if on November 3, you set the Today filter, all data for that day will be displayed. Without resetting the filter, on the following day all data for November 4 will be displayed; on the next day, all data for November 5, and so on.
	The magnifying glass icon activates a lookup browse for fields with values defined in the database.

Flags and Icons

Inventory Status Flags

In the inventory views, the colors of pairs of left- and right-facing flags indicate the status of the inventory for each item-site or kanban loop. To view the flags, if they are not displayed, use the Display tab to select Inventory Status Flags for display.

Flag Position

 The left-facing flags represent QOH.

 For the Min/Max view, the right-facing flags represent QOH + ASN. For the Kanban Board and Loop views, the right-facing flags represent QOH + In-transit kanbans.

Min/Max Flag Colors

	Blue flags indicate that quantity is above the maximum.
	White flags indicate that quantity is above the order point and below the maximum.
	Yellow flags indicate that quantity is above the minimum and below the order point.
	Red flags indicate that quantity is below the minimum required.

Kanban Status Flag Colors

	White flags indicate that quantity is above the order point.
	Yellow flags indicate that quantity is below the order point but above the minimum required for safety stock.
	Red flags indicate that quantity is below the minimum required for safety stock.

Flag Pair Examples

Min/Max View.

- Left:  Flag color = Status of QOH.
- Meaning: QOH is currently below minimum.
- Right:  Flag color = Status of QOH when shipment is received
- Meaning: QOH will be above the order point and below the maximum when the next shipment is received.

Kanban Board.

- Left:  Flag color = Status of QOH for the kanban loop
- Meaning: The QOH for the kanban loop is below the minimum.
- Right:  Flag color = Status of QOH for the kanban loop when in-transit kanbans are received
- Meaning: The QOH for the kanban loop will be above the minimum but below the order point when in-transit kanbans are received.

Flag Status and Min/Max Cell Background Colors

Min/Max inventory status flags are mirrored by cell background colors in some of the columns.

The cell background color in the QOH and Min columns of the Min/Max view will match the left-facing status flag color. The cell background color in the QOH + ASN and Max columns of the Min/Max view will match the right-facing status flag color.

White status flags are matched by a neutral cell background color. The Order Point column will be highlighted in yellow to match yellow status flags.

Alerts Icons

	 Defined and named alerts. The bell icon indicates that one or more alerts has been defined for the current table row.
	 Alert notification. The envelope icon indicates that a notification for the occurrence of an alert event has been sent. QAD Supplier Portal displays this icon to only the users who received the notification.

Note For customers and suppliers, clicking the Alert Notification icon displays notification details.

ASN Status Icons

	Incomplete
	Shipped, not exported
	Shipped, Exported, and Confirmed
	Shipped, Exported
	Received, not exported
	Received, export confirmed
	Received, exported
	Forecasted
	Indicates tracking with QAD TMS

Kanban Card State Icons

Icon color indicates the status of the kanban.

	Full. The kanban container is full and available for consumption.
	Hold. The kanban container is full but it is not available for consumption.
	Shipped. The kanban has been shipped and is currently in transit to its destination. The status changes to Shipped when the status for the associated ASN changes to Shipped. The card status may be out of sync with the ERP system if the ASN is created in QAD Supplier Portal and the status is changed to Shipped in QAD Supplier Portal.
	In process. The kanban is part of a loop with a FIFO lane. The kanban has completed any one but the last of the sequence of FIFO processes defined for the loop. See FIFO Lane in the Glossary.
	Empty accumulator. The kanban is empty and being accumulated; it is not yet authorized for replenishment. See Accumulator in the Glossary.
	Empty authorized. The kanban is empty and authorized for replenishment.
	Acknowledged. The supplying source has acknowledged the requirement to fill the empty kanban.

Purchase Order Status and Type Icons

	Open
	Closed
	Canceled
	Purchase order type = supplier schedule

Supplier Schedule Release Status Icons

	Active
	Inactive

Supplier Schedule Type Icons

	Combined, non-PRO/PLUS schedules
	Planning
	Shipping
	Forecasted, Other

General Icons

	Hide or display the side bar at the left of the QAD Supplier Portal window.
	Pass the mouse over this icon for additional information.
	Click to reset the reference point for auto refreshing data in the Min/Max, Kanban Board, Orders, Schedules, and ASN views.
	Update user-defined data. There are text, numeric, and date fields for user-defined data in a number of views. Use Admin » Company » Company, User Labels subtab to define labels for the fields.

Note Click the Update User-Defined Data icon to open the User Defined Fields screen for the current view.

Loop Status Flag

Loop Status Flag. . Flags indicate the inventory status of the loop relative to order point and safety stock requirements. The left flag reflects the status of QOH; the right flag reflects the status of QOH + In-transit. See Flags and Icons for examples.

Generate Reports

Reports Overview

Several types of reports are available in QAD Supplier Portal:

- Spreadsheet data reports can be generated from the data views and from graphs.
- A report on the log-in and log-out history for users over the past month is available in Admin » Company » User Log-In Summary.
- A report on consigned inventory use is available from the Consigned Inventory History Report subtab on the Print tab in the Min/Max and Kanban Board views.
- A schedules report is available from the Active Schedules Report subtab on the Print tab in the Schedules view.
- A PO report is available from the PO report subtab on the Print tab in the Orders view

Scrolling Data Views

Use the View Preference field in Admin » User Maintenance—User tab, Preferences subtab—to specify a standard or scrolling view of data tables in these data views: Min/Max, Kanban Board, Kanban Card, Orders, Schedules, ASNs, and Receipts.

Standard View. Use the browser window scroll bars to scan data views. The column labels and the left-most columns are scrolled out of view with the vertical and horizontal scroll bars, respectively.

Scrolling View. A scrolling view has a data table with locked column labels and a single locked column on the left containing the business key that identifies each data row. With vertical scrolling, the column labels remain visible at the top of the data table. With horizontal scrolling, row identifier information remains visible in the left column of the data table.

When the scrolling view is enabled, the column widths, with the exception of the left column, can be adjusted by clicking and dragging the right edge. Any column width adjustments are saved in the user's current workspace.

The scrolling view is available only to those using the Internet Explorer browser; results for other browsers are undefined.

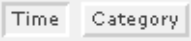
Sidebar: History, Workspaces, Appearance



Use the multiple-arrow icon at the left edge of the data to display and hide the side bar.

The side bar in the left pane of the QAD Supplier Portal window contains navigation and display control tools:

History. This panel records the ten most recent displays. A new entry is generated with each change to the display—such as the number of rows in a data view—and with each visit to a menu selection, tab, or subtab page. Clicking on the link associated with the history item returns you to that context.

Time and Category Buttons.  Use the Time and Category buttons to organize the view of the History entries.

Workspaces. Use workspaces to save and display user-configured versions of the various views. For example, configure the Board view to display the loops for a single item and save that configuration as a named workspace. See the Workspaces page for details on defining and managing workspaces.

Appearance. Use the choices in the Appearance section to customize color and design of the display. These settings apply to the current display and are maintained when changing workspaces. There are three available user interface appearances: QAD, Standard, and Classic.

Time Zone

Customer admin users can set time zone for supplier admin accounts on the Admin Account tab in Admin » Company » Supplier Maintenance.

All users can set time zone for user accounts on the User tab in Admin » Company » User Maintenance.

When time zone is set, QAD Supplier Portal displays it in the three-letter format with dates/times that are entered with a time zone. Times entered for other time zones are adjusted to the user's time zone.

If time zone is not set for a user, QAD Supplier Portal displays dates/times with the entered time zone.

Views and Details

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Messages View

Collaboration messaging allows customers and suppliers to communicate more effectively. With collaboration messaging, customers can define the issues, states, and topics that they want to use in communicating with their suppliers. Collaboration messaging in QAD Supplier Portal is a discussion forum where message threads are assigned to users, associated with topics, and organized in a chronological fashion.

The Messages view includes three subtabs: Messages, Archive, and Admin. The Messages subtab is displayed by default. Each subtab includes a main view in the center of the screen with columns for listing the message threads.

Messages Tasks

In the Messages subtab, the main panel lists your message threads with columns that include the link to the related QAD Supplier Portal item and then columns such as ID, Title, Modified, and any others available from the Column/field descriptions.

You can sort by any of the columns by clicking on a column header. For example, to sort the message threads by Priority, click on the Priority column header.

You can search the message threads by entering text in the Search field and clicking the Search button. To clear the search results and return to a view listing all message threads, click the Clear button.

Viewing Messages

QAD Supplier Portal displays the message thread details in the message detail panel, which is located on the right side of the main panel and can be open or closed by clicking on the small right and left quote icons located in the upper right corner of the main panel. To open a message, click on a row for a particular message in the main panel and the message thread details then display in the message detail panel.

The message detail panel displays the message thread content along with message details including Attributes, Attachments, and Changes information. By default, the Attributes information is displayed.

Attributes. The Attributes menu includes the Title, Priority, and Assigned fields. You can modify these fields and enter them into the system by clicking the Update button.

Attachments. The Attachments menu lists any attachments. You can add attachments using the Attachments panel. Clicking the paper clip icon opens the Attachments subtab and displays the attachment and its properties. Clicking on the link in the Description column opens the attachment. The system saves the file's MIME type so your computer knows what type of program to use to open the attachment.

Changes. The Changes menu lists a record of any changes made to the message. QAD Supplier Portal tracks changes to the messages attributes, the user that made the changes, and the date the change was made.

Below the message content, you can reply to the message by entering text and clicking the Reply button.

Creating Messages

To create a new message:

- 1 Click the New button.
- 2 Select from the Create a Message Associated With pull-down to create a message associated with a domain object defined by the customer administrator such as Item, Kanban, Organization, Purchase Order (Header), Purchase Order (Line), or Schedule. Alternatively, Select from the Create a Message pull-down to create a message associated with any topics that have been defined by the customer administrator using Topic Maintenance (Admin » Collaboration » Topic Maintenance).
- 3 In the Title field, enter a title for the message.
- 4 From the Priority pull-down, select a priority for the message.
- 5 From the Assigned To field, assign the message to the appropriate user from the list of available users on the system. Only active QAD Supplier Portal users will be listed on the drop-down menu. All new messages must be assigned to a user.
- 6 In the message box, enter some text. Note that you can use bold, italics, underline, and colors in the text.
- 7 Click Send.

The message is displayed on the appropriate views in the Messages column, which is indicated by the message icon. In a given row, a yellow icon indicates there are one or more messages associated with the item. By clicking on a clear icon, you can create a message for the associated item directly from the view.

Archiving Messages

If a message thread is no longer applicable to your work, you can archive it by selecting the message and then clicking the Archive button. The message will no longer be listed in the main panel, but will still be accessible from the Archive subtab. If you later decide that an archived message thread is still important, from the Archive subtab, you can restore archived message threads so that they are again listed in the main panel.

Checking for Messages

To check if you have any new messages, click the Check for Messages button.

Archive Tasks

The Archive menu displays archived message threads. When the status of a message thread is changed to archived, message threads are automatically moved to the Archive. Message threads that are archived are no longer displayed in the Messages main view, but they are still available in the Archive main view.

You can restore message threads that have been archived by selecting the message in the Archive main view and clicking Restore. Restored messages will be displayed in the in the Messages main view again rather than in the Archive main view.

Admin Tasks

The customer administrator user can use the Admin menu to delete messages. To delete a message, click on the red X icon next to a particular message.

Columns/Fields

This table includes all columns that are available for display in the Messages view. Not all of the available columns/fields are included in the default display.

ID. A unique identifier for the message assigned by the system.

Title. A short text description of the message thread. The system automatically create titles for all threads that are associated with domain objects, where a domain is the view associated with the message thread and a domain object is an item in that particular view. Domains include Item, Kanban, Organization, Purchase Order (Header), Purchase Order (Line), and Schedule. When a message thread is associated with a domain object, the message thread is hyperlinked to the appropriate view so you can get details about the domain object.

Issue. A value that defines the reason for the message thread. Customers can define the list of possible issues.

Status. A value that defines the status of the message thread. Customers can define the list of possible statuses.

Assigned To. The user assigned the message thread. Note that other users can view the message thread; the Assigned To field allows a particular user to be assigned responsibility for the message thread.

Priority. A value that defines the importance of the thread as an integer from 1 to 5, where 1 is highest priority.

Supplier. The name of the supplier. Note that this is only included for a consolidated supplier or consolidated customer.

Supplier ID. The main identifier of the supplier. Note that this is only included for a consolidated supplier or consolidated customer.

Supplier Business ID. The alternative identifier of the supplier. Note that this is only included for a consolidated supplier or consolidated customer.

Customer. The name of the customer. Note that this is only included for a consolidated supplier or consolidated customer.

Customer ID. The main identifier of the customer. Note that this is only included for a consolidated supplier or consolidated customer.

Customer Business ID. The alternative identifier of the customer. Note that this is only included for a consolidated supplier or consolidated customer.

Created. The date and time the message was created.

Created By. The user who created the message.

Modified. The date and time that the message thread was last modified.

Modified By. The user who most recently modified the message.

Read. Indicates whether the message thread has changed since the last time the user has viewed it (Yes or No).

Edited. Indicates whether the user has changed any thread attributes or posted any messages to the thread (Yes or No).

Domain. Indicates the view associated with the message. Domains can include Item, Kanban, Organization, Purchase Order (Header), Purchase Order (Line), or Schedule.

Topic. The topic of the message. By default, the topic is the same as the title.

Min/Max View

The Min/Max view displays vendor-managed inventory (VMI) data.

Which Item-Sites Display in the View

There are three factors that determine which item-sites the view includes: the working data set, the user's account type, and the inventory management method.

- Working data set definition. In Admin » Data Management » Data Setup » Working Data Set-VMI, Customer admin account users specify which item-site-supplier associations to display in the QAD Supplier Portal views.
- User's account type.
 - For standard customer account users, the view displays item-sites-suppliers from the VMI working data set.
 - For standard supplier account users, the view displays the item-sites for a specific customer.
 - For consolidated account users, the view displays the data from the linked accounts.
- Item display type. The Item Display settings on the Policies subtab in Item Maintenance, Supplier Maintenance, and Customer Maintenance determine which inventory views display any given VMI item.

Updating the Data

For information on when QAD Supplier Portal updates the various fields in the view, see “Update History”.

User-Defined Fields

User-defined fields (UDFs) can be created for the Min/Max, Kanban Board, Orders, Schedules, ASN Headers, Receipts, and Invoice views. Use Admin » Company » Company Maintenance » User Labels subtab to define labels for the fields for each of these views.

Update Icon.  Click the update icon in the far-right column to open the User-Defined Fields screen for updating the values in the user-defined fields.

Note An export feature provides users with the ability to export UDFs from QAD Supplier Portal to the Poller client. The Policies tab in Company Maintenance contains a policy to control the export feature for UDFs. See “Policies”.

Refining the View

Use column sorting as well as the Filter and Display tabs or subtabs to refine the view. All users can refine the view displays.

Sort by Column. Click the column labels to sort the data rows.

Filter and Display Tabs/Subtabs. Go to the Filter tab or subtab to specify the search criteria for selecting which items to include in the current Data tab or subtab display. Go to the Display tab or subtab to specify which columns to include in the Data display.

Creating Reports

Go to the Print tab to specify report definitions. Reports are based on the data available as a result of the Filter and Display tab refinements.

Flag Status and Cell Background Colors

Min/Max inventory status flags are mirrored by cell background colors in some of the columns.

The cell background color in the QOH and Min columns of the Min/Max view matches the left-facing status flag color. The cell background color in the QOH + ASN and Max columns of the Min/Max view matches the right-facing status flag color.

White status flags are matched by a neutral cell background color. The Order Point column is highlighted in yellow to match yellow status flags.

Columns/Fields

This table includes all columns/fields that are available for display in the Min/Max view. Not all of the available columns/fields are included in the default display.

Line Graph Icon.  Click the line graph icon to display the item-site inventory graph.

Bar Graph Icon.  Click the bar graph icon to display the item-site compliance graph. In the inventory views, the colors of pairs of left- and right-facing flags indicate the status of the inventory for each item-site or kanban loop.

Flag Status Icon.  The left-facing flags represent QOH. For the Min/Max view, the right-facing flags represent QOH + ASN. For the Kanban Board and Loop views, the right-facing flags represent QOH + In-transit kanbans.

- *Blue Flag Icon.*  Blue flags indicate that quantity is above the maximum.
- *White Flag Icon.*  White flags indicate that quantity is above the order point and below the maximum.
- *Yellow Flag Icon.*  Yellow flags indicate that quantity is above the minimum and below the order point.
- *Red Flag Icon.*  Red flags indicate that quantity is below the minimum required.

Multiple Alert Bells Icon. 

- *Alert Bell Icon.*  Defined and named alerts. The bell icon indicates that one or more alerts has been defined for the current table row.

Multiple Alert Notifications Icon. 

- **Alert Notification Icon.**  Alert notification. The envelope icon indicates that a notification for the occurrence of an alert event has been sent. QAD Supplier Portal displays this icon to only the users who received the notification.

Note For customers and suppliers, clicking the icon displays notification details.

AADU-3 Week. This is the average actual daily usage calculated for a period of three weeks. It is calculated in the hourly working data set update.

AADU-12 Months. This is the average actual daily usage calculated for the entire history of the item-site up to 12 months. It is calculated in the hourly working data set update.

Average Demand. This is the average demand that is currently in the Supplier Portal database. Define average demand templates in Admin » Company » Average Demand Maintenance.

Use Admin » Company » Schedule/Initiate Calculation to calculate the average demand.

Buyer. The buyer for the item-site or, if not available, for the item. Purchase order buyer is not used because there may be multiple purchase orders, each with a different buyer, for an item at a site.

Consign. The total consigned quantity of an item at a site.

Note Clicking this link displays the Consigned Inventory Usage Detail screen.

Comment.  A shaded comments icon indicates that there are item comments entered by customers or suppliers.

Note For customers and suppliers, clicking the icon opens the Comment dialog.

Consigned QoH. This is the consigned quantity of the item on hand displayed by item, site, and supplier

Customer ID. Assign the customer company business ID in Admin » Company » Company Maintenance.

Customer. The customer name, number, or code ID.

Note Clicking this link opens the Customer Detail view.

Customer DUNS Number. The unique nine-digit data universal numbering system (DUNS) number with a four-digit suffix identifying a specific location within your company; for example, a distribution center or a store.

DUNS numbers are issued by Dun & Bradstreet to North American businesses and act as a unique identifier for electronic data interchange (EDI) and global electronic commerce transactions.

Only standard customer, consolidated customer, and consolidated supplier accounts can modify their DUNS number through company maintenance.

Any modification to the regular supplier account DUNS number has to be made by the customer in their system of records. The DUNS number is not validated in QAD Supplier Portal.

CustText1-3. Labels for up to three user-defined text fields that are visible to customers only.

CustNumeric1-3. Labels for up to three user-defined numeric fields that are visible to customers only.

CustDate1-3. Labels for up to three user-defined date fields that are visible to customers only.

CustSupplierText1-3. Labels for up to three user-defined text fields that are visible to customers and suppliers.

CustSupplierNumeric1-3. Labels for up to three user-defined numeric fields that are visible to customers and suppliers.

CustSupplierDate1-3. Labels for up to three user-defined date fields that are visible to customers and suppliers.

Forecast-1 Week. This is the forecasted total quantity for one week. It is calculated in the hourly working data set update.

Forecast-Average Weekly. This is the weekly average of future scheduled forecasts for the length of the schedule. It is calculated in the hourly working data set update.

Item ID. The item ID is from the ERP database.

Items are visible in this view if they are associated with suppliers in the VMI working data set and their item display includes this view.

Note Clicking the item ID link displays the Item Detail view.

Last Consigned Used Date. This is the date of the most recent consumption of consigned inventory. It is based on the transaction effective date and the transaction number. It is displayed by item, site, and supplier.

Note If this is a link, clicking the link displays the Consigned Inventory Detail view.

Last Consigned Used Qty. This is the quantity of consigned inventory consumed in the most recent transaction. It is displayed by item, site, and supplier.

Note If this is a link, clicking the link displays the Consigned Inventory Detail view.

Last Cycle Count Date. This date is the last date that a cycle count transaction was entered for this item at this site.

Last Delivery Date. This is the date of the last receipt of this item.

Cell background color indicates there is data for this field.

Note Clicking the last delivery date link opens the Receipt Line Detail view.

Last Delivery Qty. The quantity in the last receipt of this item.

Cell background color indicates there is data for this field.

Note Clicking the Qty link opens the Receipt Line Detail view.

Max. This is the maximum inventory quantity defined in Item Maintenance.

Cell background colors indicate the inventory quantity relative to the maximum.

Note For customers, clicking the max link opens Item Maintenance. For suppliers, clicking the link displays the Item Policy Detail view.

Min. This is the minimum inventory quantity defined in Item Maintenance.

Cell background colors indicate the inventory quantity relative to the minimum.

Note For customers, clicking the min link opens Item Maintenance. For suppliers, clicking the link displays the Item Policy Detail view.

Next Delivery Date. Based on oldest ship date, the delivery date/time for the next in-transit ASN relevant to the supplier that created the ASN.

Cell background color indicates there is data for this field.

Note Clicking the next delivery date link displays the shipped ASNs for the item and site that are relevant to the supplier who created the ASN.

Next Delivery Qty. Based on oldest ship date, the shipment quantity from the next in-transit ASN relevant to the supplier that created the ASN.

Cell background color indicates there is data for this field.

Note Clicking the next delivery qty link displays the shipped ASNs for the item and site that are relevant to the supplier who created the ASN.

Order Multiple Quantity. Suppliers use this multiplier to determine quantities shipped to replenish inventory.

When suggested replenishment quantity is not specified, QAD Supplier Portal uses this value, if it is non-zero, to generate a calculated replenishment quantity.

Order Point. When the item quantity in inventory falls below the order point, it triggers an order from the supplier.

Cell background colors indicate the inventory quantity relative to the order point.

QOH. This is the quantity currently on hand.

Note Clicking the QOH link displays the Inventory Detail view. The Refresh Date is the last time this value changed; this may be different from the last time QAD Supplier Portal was updated from the ERP database.

Cell background colors indicate the inventory quantity relative to the minimum and maximum.

QOH+ASNs. Quantity on hand plus quantities to be received against in-transit ASNs, that is, status = shipped.

Cell background colors indicate the inventory quantity relative to the minimum and maximum when the shipment is received.

Refresh Date. This is the most recent time—date, time, time zone—the record was updated in the QAD Supplier Portal database.

For ASNs, the field displays a refresh date only if the ASN was created outside of QAD Supplier Portal; if the ASN was created in QAD Supplier Portal, the field is blank.

Replenishment Qty. This is the suggested quantity for each replacement shipment as defined in Item Maintenance.

Note For customers, clicking the Qty link opens Item Maintenance. For suppliers, clicking the link displays the Item Detail view.

Site. Site ID is from the ERP database. Only sites associated with suppliers in the working data set are visible.

Note Clicking the site ID link displays the Site Detail view.

Supplier DUNS Number. The unique nine-digit data universal numbering system (DUNS) number with a four-digit suffix identifying a specific location within your company; for example, a distribution center or a store.

DUNS numbers are issued by Dun & Bradstreet to North American businesses and act as a unique identifier for electronic data interchange (EDI) and global electronic commerce transactions.

Only consolidated supplier accounts can modify their DUNS number through company Maintenance. Any modification to the regular supplier account DUNS number has to be made by the customer in their system of records. The DUNS number is not validated in QAD Supplier Portal.

Suggested Replenishment Quantity. If this value is zero, QAD Supplier Portal calculates a replenishment quantity based on maximum quantity, QOH, in-transit ASN quantity, and order multiple quantity.

When item inventory is less than minimum, QAD Supplier Portal displays suggested or calculated replenishment quantity in the Replenishment Qty column.

Supplier.  Supplier name is from the ERP database. Only suppliers associated with item-sites in the VMI working data set are visible.

Note Clicking the supplier name link displays the Supplier Address Detail view.

A shaded comments icon indicates that there are supplier comments entered by customers or suppliers.

Supplier ID. This supplier business ID is loaded from the ERP system or other data source.

Supplier Item ID. The item number, name, or code used by the supplier.

Total Quantity. The total quantity that MRP considers on hand—nettable is Yes—for this item at this time.

UM. Quantities are expressed in the unit of measure used for item stocking.

Message Icon.  Indicates whether any collaboration messages are available for a given item. For a given item, a yellow message icon indicates one or more messages are available and a white message icon indicates no messages are available.

Note Click to open a message.

Update Icon.  Update user-defined data. There are text, numeric, and date fields for user-defined data in a number of views. Use Admin»Company»Company Maintenance, User Labels subtab to define labels for the fields.

Note Click to open the User Defined Fields screen for the current view.

Min/Max and Order Point Calculations

Note These calculations apply only to those items where Replenishment Calculation Policy is set to min/max controlled replenishment in Admin » Item » Item Maintenance—Item tab, Policy subtab.

Calculation Policies

Calculation policies are set by company. Policies for individual items can be set to override the default company policies.

Use Admin » Company » Company Maintenance—Company tab, Policies subtab—to set company defaults for the following:

- Demand template
- Manual-entry or calculated min/max quantities
- Manual-entry or calculated order point quantity

Use Admin » Item » Item Maintenance—Item tab, Policy subtab—to accept the company defaults or to set item-specific policies.

Schedule/Initiate Calculations

When calculate quantities is enabled for an item, use Admin » Company » Schedule/Initiate Calculations to launch the calculations or schedule the calculations for some future time. Choose which calculations to run:

- Average demand, minimum, maximum, and order point
- Average demand only
- Minimum, maximum, and order point only

Scheduled calculations take place during the hourly update of the working data set immediately following the scheduled time. Initiated calculations take place during either the next hourly or 5-minute working data set updates.

Average Demand Calculation

Average demand is used in the minimum, maximum, and order point calculations so it must be calculated first. The average demand calculation is based on templates defined in Admin » Company » Demand Calculation Template. Parameters include historical and future work days, which weeks to include, and whether to use site and holiday calendars from the ERP system.

Items can have a defined template specified in item policies or accept the default defined in company policies.

After calculation, increases in demand that are within the tolerance parameter set in the template are written to the QAD Supplier Portal database. Increases that are beyond the tolerance parameter must be manually accepted or rejected in Admin » Company » Average Demand Maintenance.

Min/Max Quantity Calculations

The minimum and maximum quantity calculations both use the calculated average demand.

$$\begin{aligned}\text{Min Qty} &= \text{Average Demand} * \text{Safety Stock Days} \\ \text{Max Qty} &= \text{Average Demand} * \text{Total Lead Time}\end{aligned}$$

Total lead time includes: fixed ordering interval, order lead time, replenishment time, order quantity days, and safety stock days. These values are all specified on Admin » Item » Item Maintenance—Item tab, Policy subtab.

Order Point Calculation

The order point calculation uses the calculated average demand and minimum quantity.

Order Point Qty = Min + (Replenishment Time * Average Demand) + (Order Lead Time * Average Demand)

Min/Max Order Point Maintenance

Use Admin » Company » Min/Max Order Point Maintenance to review the current and newly calculated Minimum, Maximum, and Order Point calculations. Using Min/Max Order Point Maintenance, you can review the current and newly calculated values before implementing a change for a given item.

Refining the View

Use column sorting as well as the Filter and Display tabs to refine the view.

Sort by Column. Use the icons above the column labels to sort the values in the columns.

Filter and Display Tabs. Go to the Filter tab to specify the search criteria for selecting which items to include in the current Data subtab display. Go to the Display tab to specify which columns to include in the Data subtab display.

Creating Data Reports

Go to the Print tab to specify report definitions. Reports are based on the data available as a result of the Filter and Display tab refinements.

Column/Field Descriptions

Item ID. The item number, name, or code from the customer ERP system or other data source.

Link: When this field is a link, clicking this link opens the Item Detail view.

Item Description. This is the item description from the ERP system or other data source.

Site. This ID is the number or code for the site from the customer ERP system or other data source.

Site Description. This is the name of the site or information about the site from the customer ERP system or other data source.

Buyer. The buyer for the item-site or, if not available, for the item.

Current MIN. The current minimum quantity.

Calculated MIN. The calculated minimum quantity.

Current MAX. The current maximum quantity.

Calculated MAX. The calculated maximum quantity.

Current OP. The current order point (OP).

Calculated OP. The calculated order point (OP).

Tolerance %. This applies to average demand. After calculation, changes in demand that are within the tolerance percentage are written to the QAD Supplier Portal database. Changes that are beyond the tolerance percentage must be manually accepted or rejected in Admin » Company » Average Demand Maintenance.

Note: It is best not to enter a tolerance percentage the first time average demand is calculated; this allows all calculated average demands to be within tolerance.

Maintenance Tasks

Using the Min/Max Order Point Maintenance screen, you can update QAD Supplier Portal to use calculated values or to retain current values when a value is not within the tolerance percentage.

Updating with Calculated Values

If a calculated quantity is not within the tolerance percentage for the quantity, you can edit the cell for that calculated quantity. If you want to have QAD Supplier Portal accept the value, click the checkbox next to the cell you have edited. If selecting all the cells, you can use the Select All button to click all the checkboxes automatically. (If you need to unselect all the cells, use the Unselect All button.) Finally, click the Accept Selected button to have QAD Supplier Portal accept the changes.

Updating with Current Values

To have QAD Supplier Portal retain a current quantity and ignore the calculated quantity, click the checkbox next to the cell. If selecting all the cells, you can use the Select All button to click all the checkboxes automatically. (If you need to unselect all the cells, use the Unselect All button.) Finally, click the Keep Existing button.

Min/Max Inventory Compliance Graphs

Min/max inventory compliance graphs are available for individual item-sites and for suppliers; the supplier graphs include all item-sites in the working data set for that supplier.

In Inventory » Min/Max, click the bar graph icon on any line to display the compliance graphs for that item-site. For the supplier graphs, click the supplier ID in the Min/Max view to display Supplier Address Detail; then, click the bar graph icon on the Organization line.

There are two graphs; one reflects the frequency—measured once per hour—that inventory for the item-site is below minimum, within the minimum to maximum range, and above maximum. A second graph shows the percentage of time that inventory for the item-site was in each of the three states. The data tables below each of the graphs show the frequencies that are being graphed.

The default is to display all available data. To restrict the graphs to a specific date range, enter the start date and end date in the appropriate fields above the graphs; then click Go.

Click Export to display the Inventory Report screen. Enter the title, file name, format, and page orientation; then, click Run to create the report. For details, see “Data Reports for Graphs”.

Time Phased Detail View

This view displays the schedules and ASNs for an item-site. The running total in the Variance column indicates how well the supplier is keeping up with the schedule.

This data is for item-sites in the vendor managed inventory (VMI) working data set.

For information on when QAD Supplier Portal updates the various fields in the view, see “Update History”.

The Item Display Type settings in Item Policy Maintenance, Supplier Maintenance, and Customer determine which inventory views display any given item.

Reports. Go to the Print tab to specify report definitions. Reports are based on the data available as a result of the Filter and Display tab refinements.

Update Button.  The refresh icon updates the time-phased records; after opening this view, click the icon before selecting an item. Clicking the icon also clears display errors encountered when selecting an item from the Search-Results frame or when opening a detail window.

User-Defined Fields

User-defined fields (UDFs) can be created for the Min/Max, Kanban Board, Orders, Schedules, ASN Headers, Receipts, and Invoice views. Use Admin » Company » Company Maintenance » User Labels subtab to define labels for the fields for each of these views.

Update Icon.  Click the update icon in the far-right column to open the User-Defined Fields screen for updating the values in the user-defined fields.

Note An export feature provides users with the ability to export UDFs from QAD Supplier Portal to the Poller client. The Policies tab in Company Maintenance contains a policy to control the export feature for UDFs. See “Policies”.

Refining the View

Use column sorting as well as the Filter and Display tabs or subtabs to refine the view. All users can refine the view displays.

Sort by Column. Click the column labels to sort the data rows.

Filter and Display Tabs/Subtabs. Go to the Filter tab or subtab to specify the search criteria for selecting which items to include in the current Data tab or subtab display. Go to the Display tab or subtab to specify which columns to include in the Data display.

Creating Reports

Go to the Print tab to specify report definitions. Reports are based on the data available as a result of the Filter and Display tab refinements.

Summarize by Date. If checked, folds all lines with the same date into one line.

PRIOR row: All schedule, ASN, and forecast quantities dated prior to the specified filter date are summarized in the PRIOR row. The Details column shows the earliest date covered by the row.

Suppressed Rows. Rows with zero quantities for schedules, forecasts, and ASNs are suppressed.

Date Column: For ASN rows, the Date column displays the Ship Date if the Target Delivery Date is null.

Schedule Column: For schedule rows, the Schedule column displays the net required quantity:

$$\text{Net Req Qty} = \text{Cum Req Qty} - \text{Cum Rcvd Qty}$$

Forecast Column. For forecast rows, the data in the Forecast column is now from imported shipping forecasts. ASNs of type Forecast are no longer displayed in this view. The data from each shipping forecast replaces data from the previously imported shipping forecast.

Details Column. The data in the Details column has changed for these rows:

- Consolidated: There is no link and the new message is Multiple Details.
- ASN rows: The link is to the ASN Detail window.
- Schedule rows: The link is to the Schedule Detail window.
- Forecast rows: The link is to the Shipping Forecast Detail window.

Columns/Fields

This table includes all columns/fields that are available for display in the Time Phased Detail view. Not all of the available columns/fields are included in the default display.

ASN. For ASN rows, the ASN Ship Qty.

Buyer. The buyer for the item-site or, if not available, for the item.

Customer Business ID. This field is relevant only for consolidated accounts with multiple linked customer accounts. The customer business ID—set by the customer in Admin » Company » Company—differentiates data for the same customer from multiple ERP systems, databases, or data sources.

The default is the customer identifying number or ID code from the subscription form.

Customer ID. Assign the customer company business ID in Admin»Company»Company Maintenance.

Customer. The customer name or description.

Note If this is a link, clicking the link opens the Customer Detail view.

Date. Target Delivery Date. For ASN rows, the Ship Date if the Target Deliver Date is blank.

Details—by row type.

- Consolidated: There is no link because there are multiple details.
- PRIOR: The earliest date covered by the row.
- ASN: Link to the ASN Detail window.

- Schedule: Link to the Schedules Detail window.
- Forecast: Link to the Shipping Forecast Detail window.

Item Description. This is the item description from the ERP system or other data source.

Item ID. The item ID is from the ERP database.

Items are visible in this view if they are associated with suppliers in the VMI working data set and their item display includes this view.

Note Clicking the item ID link displays the Item Detail view.

Forecast. For forecast rows, data from imported shipping forecasts. The data from each imported shipping forecast replaces data from the previous shipping forecast.

Schedule. For schedule rows, the net required quantity:

$$\text{Net Req Qty} = \text{Cum Req Qty} - \text{Cum Rcvd Qty}$$

Site Description. This is the name of the site or information about the site from the customer ERP system or other data source.

Site. Site ID is from the ERP database. Only sites associated with suppliers in the VMI working data set are visible.

Note Clicking the site ID link displays the Site Detail view.

Supplier Business ID. This field is relevant only for consolidated accounts with multiple linked supplier accounts. The supplier business ID—set by the supplier in Admin » Company » Company —differentiates data for the same supplier from multiple ERP systems or data sources.

The default is the supplier identifying number or ID code that is loaded in QAD Supplier Portal from the customer's ERP system or other data source.

Supplier ID. The identifying number or ID code for a supplier is loaded from the ERP system or other data source. For VMI items, only suppliers associated with item-sites in the VMI working data set are available in the views.

Note When this field is a link, clicking the link opens the Supplier Address Detail view.

Supplier. The supplier name or description is loaded from the ERP system or other data source. Note that during load operations for the VMI poller, if the supplier on a purchase order is changed and if the purchase order has any transactions (such as receipts or ASNs) or if the purchase order is a scheduled order, the supplier will not be changed on the purchase order.

Variance. Cumulative difference between demand such as schedules and supply such as ASNs.

A red cell indicates the variance is not within an acceptable range.

Time Phased Summary View

This data is for item-sites in the vendor managed inventory (VMI) working data set.

Which Item-Sites Display in the View

There are three factors that determine which item-sites the view includes: the working data set, the user's account type, and the inventory management method.

- Working data set definition. In Admin » Data Management » Data Setup » Working Data Set-VMI, Customer admin account users specify which item-site-supplier associations to display in the Supplier Portal views.
- User's account type.
 - For standard customer account users, the view displays item-sites-suppliers from the VMI working data set.
 - For standard supplier account users, the view displays the item-sites for a specific customer.
 - For consolidated account users, the view displays the data from the linked accounts.
- Item display type. The Item Display settings on the Policies subtab in Item Maintenance, Supplier Maintenance, and Customer Maintenance determine which inventory views display any given VMI item.

The Filter tab has an additional field, View, for determining which items display.

- All: Displays all times, active schedules, and open ASNs.
- Earliest: Displays the first line for each item-site.
- Under Supply: Displays the first variance line that is negative for each item that has one.

Updating the Data

For information on when QAD Supplier Portal updates the various fields in the view, see “Update History”.

Use the Update button to show the effects of new ASNs or schedule changes.

Refining the View

Use column sorting as well as the Filter and Display tabs or subtabs to refine the view. All users can refine the view displays.

Sort by Column. Click the column labels to sort the data rows.

Filter and Display Tabs/Subtabs. Go to the Filter tab or subtab to specify the search criteria for selecting which items to include In the current Data tab or subtab display. Go to the Display tab or subtab to specify which columns to include in the Data display.

Creating Reports

Go to the Print tab to specify report definitions. Reports are based on the data available as a result of the Filter and Display tab refinements.

Columns/Fields

This table includes all columns/fields that are available for display in the Time Phased Summary view. Not all of the available columns/fields are included in the default display.

Customer. The customer name or description.

Note If this is a link, clicking the link opens the Customer Detail view.

Customer ID. The customer name, number, or code ID from the ERP system or other data source.

Customer Business ID. This field is relevant only for consolidated accounts with multiple linked customer accounts. The customer business ID—set by the customer in Admin » Company » Company —differentiates data for the same customer from multiple ERP systems, databases, or data sources.

The default is the customer identifying number or ID code from the subscription form.

Date. Target Delivery Date. For ASN rows, the Ship Date if the Target Deliver Date is blank.

Item ID. The item ID is from the ERP database.

Items are visible in this view if they are associated with suppliers in the VMI working data set and their item display includes this view.

Note Clicking the item ID link displays the Item Detail view.

Site. Site ID is from the ERP database. Only sites associated with suppliers in the VMI working data set are visible.

Note Clicking the site ID link displays the Site Detail view.

Supplier. The supplier name or description is loaded from the ERP system or other data source. Note that during load operations for the VMI poller, if the supplier on a purchase order is changed and if the purchase order has any transactions (such as receipts or ASNs) or if the purchase order is a scheduled order, the supplier will not be changed on the purchase order.

Supplier ID. The identifying number or ID code for a supplier is loaded from the ERP system or other data source. For VMI items, only suppliers associated with item-sites in the VMI working data set are available in the views.

Note When this field is a link, clicking the link opens the Supplier Address Detail view.

Supplier Business ID. This field is relevant only for consolidated accounts with multiple linked supplier accounts. The supplier business ID—set by the supplier in Admin » Company » Company —differentiates data for the same supplier from multiple ERP systems or data sources.

The default is the supplier identifying number or ID code that is loaded in QAD Supplier Portal from the customer's ERP system or other data source.

Variance. Cumulative difference between demand such as schedules and supply such as ASNs.

A red cell indicates the variance is not within an acceptable range.

Message Icon. . Indicates whether any collaboration messages are available for a given item. For a given item, a yellow message icon indicates one or more messages are available and a white message icon indicates no messages are available.

Note Click to open a message.

Kanban Board View

Kanban Board displays a graphic representation of the status of kanban loops—the number of full kanbans, the number of kanbans in transit, and so on—as well as the defining information for each loop. All data is imported from a data source, such as an ERP system.

Which Loops Display in the View

In Admin » Data Management » Data Setup » Working Data Set – Kanban, customers in the admin users group can specify which loops to display in the various kanban views.

Updating the Data

For information on when QAD Supplier Portal updates the various fields in the view, see “Update History”.

User-Defined Fields

User-defined fields (UDFs) can be created for the Min/Max, Kanban Board, Orders, Schedules, ASN Headers, Receipts, and Invoice views. Use Admin » Company » Company Maintenance » User Labels subtab to define labels for the fields for each of these views.

Update Icon.  Click the update icon in the far-right column to open the User-Defined Fields screen for updating the values in the user-defined fields.

Note An export feature provides users with the ability to export UDFs from QAD Supplier Portal to the Poller client. The Policies tab in Company Maintenance contains a policy to control the export feature for UDFs. See “Policies”.

Refining the View

Use column sorting as well as the Filter and Display tabs or subtabs to refine the view. All users can refine the view displays.

Sort by Column. Click the column labels to sort the data rows.

Filter and Display Tabs/Subtabs. Go to the Filter tab or subtab to specify the search criteria for selecting which items to include in the current Data tab or subtab display. Go to the Display tab or subtab to specify which columns to include in the Data display.

Creating Reports

Go to the Print tab to specify report definitions. Reports are based on the data available as a result of the Filter and Display tab refinements.

Columns/Fields

This table includes all columns/fields that are available for display in the Board view. Not all of the available columns/fields are included in the default display. See “Flags and Icons” for details.

Flag Status Icon.  Loop status flag. Flags indicate the inventory status of the loop relative to order point and safety stock requirements. The left flag reflects the status of QOH; the right flag reflects the status of QOH + In-transit.

White Flag Icon.  White flags indicate that quantity is above the order point.

Yellow Flag Icon.  Yellow flags indicate that quantity is below the order point but above the minimum required for safety stock.

Red Flag Icon.  Red flags indicate that quantity is below the minimum required for safety stock.

Multiple Alert Bells Icon. 

- **Alert Bell Icon.**  The bell icon in a data line indicates that the data line is monitored as a target data line in at least one user-defined alert. Exceptions: alerts such as *New VMI working data set selection* and *Average demand out of tolerance* that are aimed at the customer organization rather than a single data line do not display the icon since it would apply to all data lines.

Multiple Alert Notifications Icon.  The envelope icon in a data line indicates that alert notifications have been sent regarding that target data line.

1/2 Card. A one-card kanban loop has only replenishment cards. A two-card kanban loop has both replenishment cards and move cards.

Accumulator Type. The type of accumulator for accumulating empty kanbans that are not authorized for production: quantity, quantity and a fixed interval, quantity and a scheduled time. When the accumulator reaches the quantity/time threshold, an Order Qty of kanbans are authorized for production.

Backflush. Specifies whether the components for this loop will be backflushed.

Buyer/Planner. The code—from the item-site—identifying the buyer or planner for this kanban loop.

Card Type. In a one-card kanban system, all the cards are replenishment cards. In a two-card kanban system, there can be move cards and replenishment cards.

Consigned Qty. The total consigned quantity of an item at a site.

Note If this is a link, clicking the link displays the Consigned Inventory Detail view.

Container Capacity. The container or package size for the kanbans in this loop.

Container Type. The type of container used for items in this loop, such as tray or tub.

CustText1-3. Labels for up to three user-defined text fields that are visible to customers only.

CustNumeric1-3. Labels for up to three user-defined numeric fields that are visible to customers only.

CustDate1-3. Labels for up to three user-defined date fields that are visible to customers only.

CustSupplierText1-3. Labels for up to three user-defined text fields that are visible to customers and suppliers.

CustSupplierNumeric1-3. Labels for up to three user-defined numeric fields that are visible to customers and suppliers.

CustSupplierDate1-3. Labels for up to three user-defined date fields that are visible to customers and suppliers.

Daily Demand. The expected daily demand for this item.

Data Source. The origin of the kanban data, such as the name of the ERP system.

FIFO Qty in Process. For loops where the source type is process and there are FIFO lanes defined, the number of cards in the loop that are in the In Process state. The system updates this field each time a transaction is performed on a card that belongs to the loop.

Interval Time. The time in seconds for the fixed-interval accumulator type. The accumulator checks for the threshold number of empty kanbans every Interval Time seconds.

Item Description. A text description of this item.

Item ID. The item number, name, or code from the customer ERP system or other data source.

Note When this field is a link, clicking this link opens the Item Detail view.

Kanban Quantity. The number of items in each replenishment kanban.

Last Consigned Used Date. This is the date of the most recent consumption of consigned inventory. It is based on the transaction effective date and the transaction number.

Note If this is a link, clicking the link displays the Consigned Inventory Detail view.

Last Consigned Used Qty. This is the quantity of consigned inventory consumed in the most recent transaction.

Note If this is a link, clicking the link displays the Consigned Inventory Detail view.

Loop Status and Card Status. The colors of the card icons indicate the state—Full, Empty, Shipped, and so on—of each kanban.

- Full.  The kanban container is full and available for consumption.
- Hold.  The kanban container is full but it is not available for consumption.
- Shipped.  The kanban has been shipped and is currently in transit to its destination. The status changes to Shipped when the status for the associated ASN changes to Shipped. The card status may be out of sync with the ERP system if the ASN is created in QAD Supplier Portal and the status is changed to Shipped in QAD Supplier Portal.
- In process.  The kanban is part of a loop with a FIFO lane. The kanban has completed any one but the last of the sequence of FIFO processes defined for the loop. See FIFO Lane in the Glossary.
- Empty accumulator.  The kanban is empty and being accumulated; it is not yet authorized for replenishment. See Accumulator in the Glossary.
- Empty authorized.  The kanban is empty and authorized for replenishment.
- Acknowledged.  The supplying source has acknowledged the requirement to fill the empty kanban.

- Order point. | Order point for the loop.
- Safety stock. | Safety stock or minimum number of full kanbans required for the loop.

Max Buffer Size. The maximum number of inventory items in the current loop--number of active cards.

Max Cycle Time. A kanban can be considered missing if more than this number of seconds passes since the last transaction for that kanban.

Min Cycle Time. The minimum time allowed—in seconds—between kanban transactions for the same kanban card.

Next Accumulator Date. The next date that the accumulator logic will check for the threshold number of empty kanbans.

Next Accumulator Time. The time, in seconds, on Next Accumulator Date that the accumulator logic next checks for the threshold number of empty kanbans.

Number of Kanban. The total number of kanban cards—active and inactive—in the loop.

Number of Active Kanban. The number of active kanban cards in the loop.

Order Point. When the number of full kanbans in a loop falls below the order point, it triggers delivery of full kanbans from the supplying source.

Order Qty. The supplying source order quantity of items for the fixed quantity accumulator type. The accumulator checks frequently whether the number of kanbans in the empty-accumulator state * the kanban quantity (number of items in each replenishment kanban) has reached this threshold.

Print ID Barcode. Indicates whether to print the kanban ID barcode on the kanban card.

Print Item Barcode. Indicates whether to print the item number barcode on the kanban card.

Print Qty. Indicates whether the quantity should print on the kanban card.

Purchase Order. The purchase order number for obtaining this item from the supplier.

Note Clicking this link opens the Purchase Order Detail.

Purchase Order Line. The purchase order line number from the ERP database.

Quantity Mismatch Method. In combination with Rounding Threshold Percent, this method controls how unit quantities are converted to a number of kanban cards when the unit quantity is not an exact multiple of the kanban quantity. Valid values are:

- Round (the default). The system rounds the remaining quantity based on the value specified in Rounding Threshold Percent and generates kanban history records without acknowledging that rounding took place.
- Warning. The system rounds the remaining quantity as specified in Rounding Threshold Percent, and creates kanban history records without acknowledging that rounding took place.
- Error. The system does not complete processing for the loop unless the quantity specified is an exact multiple of the kanban quantity. An error message displays on the output report.

Although the Round and Warning values have the same effect in Supplier Portal, the field shows which value was set in the ERP system.

QOH. Quantity on hand. The number of kanbans in the loop that are currently full.

QOH+In Transit. Quantity on hand plus number in transit. Number of full kanbans on hand plus number of kanbans that are in transit from the supplying source.

Refresh Date. This is the most recent time—date, time, time zone—the record was updated in the QAD Supplier Portal database.

For ASNs, the field displays a refresh date only if the ASN was created outside of QAD Supplier Portal; if the ASN was created in QAD Supplier Portal, the field is blank.

Replenishment Time. The time, in seconds, to replenish this kanban.

Rounding Threshold %. For kanban-based POs, when Quantity Mismatch Method is Round, this field indicates if the number of kanbans to be selected should be rounded up or rounded down.

- 0.00%: Always round down.
- 100.00%: Always round up.
- 0.00%<n%<100.00%: If the excess quantity is equal to or greater than this percent, the system rounds up to select an additional card. If the excess quantity is less, the system rounds down.

Safety Stock. The minimum number of full kanbans to be maintained at the supermarket for this loop.

Safety Days. Safety stock expressed as time; stock sufficient to fulfill Safety Days decimal days of demand.

Source Type. Supplying source types are supermarket, supplier, inventory, and process.

Step. The unique code for identifying the specific step that the loop represents in the entire manufacturing process for an item. Step is part of the unique identifier for each loop. Although Step may reflect routings and operations in the ERP system, it is defined independently of them.

Supermarket ID. The ID for the consuming supermarket for this loop.

Supermarket Site. The ID for the supermarket site that consumes kanban items for this loop.

Note For customers and suppliers, clicking the destination ID link displays the address detail.

Supplier. If the supplying source for the kanban loop is a supplier, this is the identifying number or ID code for the supplier. It is loaded from the ERP system or other data source.

Supplier Item ID. The supplier ID for this item.

Supplying Reference. Supplying reference is dependent on supplying source type.

- Supplier: Purchase order ID
- Inventory: Supplying supermarket ID
- Process: Process ID

Supplying Source. The supplier ID when the supplying source type is a supplier or the site ID when the supplying source type is inventory or process.

Note For customers and suppliers, clicking the link displays the address and contacts detail for suppliers and the site detail for sites.

Total Lead Time. In loops with FIFO lanes, this total includes the processing time at the primary process—the supply source—plus the cumulative processing time for all of the FIFO processes in the loop. The format is DD:HH:MM:SS, that is, days:hours:minutes:seconds.

Variability Factor. A multiplier that limits or increases the amount of inventory in the supermarket. Variability factor is a more convenient means than safety stock of responding to variations such as seasonal demand and sales promotions.

Warning Limit. A user-defined value used in evaluating the historical level of supermarket inventory for a loop. Analysis of inventory levels using warning limit and critical limit can be used as the basis for adjusting target inventory levels.

Update user-defined data.  There are text, numeric, and date fields for user-defined data in a number of views. Use Admin » Company » Company Maintenance, User Labels subtab to define labels for the fields.

Note Click to open the User Defined Fields screen for the current view.

Message Icon.  Indicates whether any collaboration messages are available for a given item. For a given item, a yellow message icon indicates one or more messages are available and a white message icon indicates no messages are available.

Note Click to open a message.

Delete Inactive Kanban Loops

You can delete inactive kanban loops using the Inactive Kanban Loops Deletion screen. To access the screen, choose Admin » Data Management » Delete Records » Inactive Kanban Loops.

To delete inactive kanban loops:

- 1 In the Inactive Kanban Loop Deletion screen, specify a set of kanban loops within a range by setting the From-To Supplier, From-To Site, From-To Item, and From-To Supermarket fields.
- 2 Set Delete to yes if you want to delete the inactive kanban loops at this time.
- 3 Set Print to yes if you want to print a report of the inactive kanban loops at this time. You can print a report before, during, or after a deletion.
- 4 If you set Print to yes, select the format and orientation of the report by setting the Format and Orientation fields. For example, you can generate a PDF with landscape orientation.
- 5 Click Run.
- 6 If printing, click OK in the Processing. Please Wait... pop-up window that appears.

Column/Field Descriptions

This table includes all columns/fields that are available on the screen.

Column/Field	Description
From-To Supplier	These are the first and last suppliers in a range of suppliers. Click the magnifying glass icon to display a list of suppliers from which you can select.

From-To Site	These are the first and last sites in a range of sites.
From-To Item	These are the first and last items in a range of items.
From-To Supermarket	These are the first and last items in a range of items.
Delete	Select Yes to delete all inactive kanban loops within the specified ranges and parameters.
Print	Select Yes to print all inactive kanban loops within the specified ranges and parameters.
Format	Select Acrobat PDF, comma-separated values (CSV), or symbolic link (SLK) format.
Orientation	Orientation applies only to PDF-format. QAD Supplier Portal can generate PDF files in portrait or landscape orientation.
File Name	Specify the output file name.

Kanban Card View

The Kanban Card view displays the defining information for cards as well as information on the most recent transaction for each card. Most data is imported from the data source, such as an ERP system. The exception can be the card status: For ASNs created in QAD Supplier Portal having the status Shipped, the status for associated cards is also changed to Shipped.

Refining the View

Use column sorting as well as the Filter and Display tabs or subtabs to refine the view. All users can refine the view displays.

Sort by Column. Click the column labels to sort the data rows.

Filter and Display Tabs/Subtabs. Go to the Filter tab or subtab to specify the search criteria for selecting which items to include in the current Data tab or subtab display. Go to the Display tab or subtab to specify which columns to include in the Data display.

Creating Reports

Go to the Print tab to specify report definitions. Reports are based on the data available as a result of the Filter and Display tab refinements.

Columns/Fields

This table includes all columns/fields that are available for display in the Card view. Not all of the available columns/fields are necessarily included in the default display.

Active. Indicates whether the card is currently active or inactive in the loop.

Authorization Date. The date and time that the card was last authorized.

Buyer/Planner. The code—from the item-site—identifying the buyer or planner for this kanban loop.

Loop Status and Card State. The colors of the card icons indicate the state—Full, Empty, Shipped, and so on—of each kanban.

Full.  The kanban container is full and available for consumption.

Hold.  The kanban container is full but it is not available for consumption.

Shipped.  The kanban has been shipped and is currently in transit to its destination. The status changes to Shipped when the status for the associated ASN changes to Shipped. The card status may be out of sync with the ERP system if the ASN is created in QAD Supplier Portal and the status is changed to Shipped in QAD Supplier Portal.

In process.  The kanban is part of a loop with a FIFO lane. The kanban has completed any one but the last of the sequence of FIFO processes defined for the loop. See FIFO Lane in the Glossary.

Empty accumulator.  The kanban is empty and being accumulated; it is not yet authorized for replenishment. See Accumulator in the Glossary.

Empty authorized.  The kanban is empty and authorized for replenishment.

Acknowledged.  The supplying source has acknowledged the requirement to fill the empty kanban.

Order point.  Order point for the loop.

Safety stock.  Safety stock or minimum number of full kanbans required for the loop.

Card Type. In a one-card kanban system, all the cards are replenishment cards. In a two-card kanban system, there can be move cards and replenishment cards.

Completed Process Count. For loops where there are defined FIFO processes and the card state is In Process, the number of FIFO processes that the card has completed. This does not include the source process.

Due Date. The date the item is due.

EPE Interval. The EPE interval is the minimum time a process needs to make all the items it produces based on average demand. It is calculated for only the primary process when a loop has FIFO lanes.

FIFO Process Count. For loops where the source type is process and there are FIFO lanes defined, this is the number of FIFO processes in the loop. This does not include the source process.

Note For customers and suppliers, clicking the FIFO Process Count link displays the process detail.

Item Description. A text description of this item.

Item ID. The item number, name, or code from the customer ERP system or other data source.

Note When this field is a link, clicking this link opens the Item Detail view.

Kanban ID. The kanban ID is the unique identifier for each kanban card.

Kanban Quantity. The number of items in each replenishment kanban.

Last Transaction Date. The date and time of the last transaction that was reported for this kanban ID.

Last Transaction Name. The name of the last transaction that was reported for this kanban ID:

- Acknowledge
- Authorize
- Consume with accumulator
- Consume without accumulator
- Fill
- Hold
- Release
- Ship

Last Transaction User ID. The name of the user who performed the last transaction for this kanban ID.

Loop Size. The current number of kanban—active cards—in the loop.

Move Time. Move time is the total time in days, hours, minutes, and seconds that it takes to move items between operations in this process.

Next Process. For loops where there are defined FIFO processes and the card state is In Process, the ID code for the next process in the FIFO process sequence.

Pitch Interval. Pitch interval is the product of pitch quantity and takt time. Pitch quantity is a multiple of kanban quantity, the number of items per kanban. Pitch is a management time frame representing the frequency at which you withdraw finished goods from a pacemaker process as well as the corresponding amount of schedule you can release to that process.

Pitch Quantity. Pitch quantity is a multiple of kanban quantity, the number of items per kanban.

Pitch UM. Pitch UM is the unit of measure associated with the value specified for pitch quantity.

Process Code. The alphanumeric code representing this process.

Sequence. The position of each FIFO process in the sequence of the FIFO processes in a loop.

Source Type. Supplying source types are supermarket, supplier, inventory, and process.

Supermarket ID. The ID for the consuming supermarket for this loop.

Supermarket Site. The ID for the supermarket site that consumes kanban items for this loop.

Note For customers and suppliers, clicking the destination ID link displays the address detail.

Supplier Item ID. The supplier ID for this item.

Supplying Reference. Supplying reference is dependent on supplying source type.

- Supplier: Purchase order ID
- Inventory: Supplying supermarket ID
- Process: Process ID

Supplying Source. The supplier ID when the supplying source type is a supplier or the site ID when the supplying source type is inventory or process.

Note For customers and suppliers, clicking the link displays the address and contacts detail for suppliers and the site detail for sites.

Takt Time. Takt time is the time required to produce one unit at the customer's rate of demand.

Time Available. Time available is the total time available on each daily shift; it is based on calendar records.

Total Lead Time. In loops with FIFO lanes, this total includes the processing time at the primary process—the supply source—plus the cumulative processing time for all of the FIFO processes in the loop. The format is DD:HH:MM:SS, that is, days:hours:minutes:seconds.

Kanban Loop View

The Kanban Loop view identifies the data source and displays the data elements defined for each loop in the system. All data is imported from a data source, such as an ERP system.

Which Loops Display in the View

In Admin » Data Management » Data Setup » Working Data Set – Kanban, customers in the admin users group can specify which loops to display in the various kanban views.

Refining the View

Use column sorting as well as the Filter and Display tabs or subtabs to refine the view. All users can refine the view displays.

Sort by Column. Click the column labels to sort the data rows.

Filter and Display Tabs/Subtabs. Go to the Filter tab or subtab to specify the search criteria for selecting which items to include in the current Data tab or subtab display. Go to the Display tab or subtab to specify which columns to include in the Data display.

Creating Reports

Go to the Print tab to specify report definitions. Reports are based on the data available as a result of the Filter and Display tab refinements.

Columns/Fields

This table includes all columns/fields that are available for display in the Loop view. Not all of the available columns/fields are included in the default display.

Flag Status Icon.  Loop status flag. Flags indicate the inventory status of the loop relative to order point and safety stock requirements. The left flag reflects the status of QOH; the right flag reflects the status of QOH + In-transit.

- White flag.  White flags indicate that quantity is above the order point.
- Yellow flag.  Yellow flags indicate that quantity is below the order point but above the minimum required for safety stock.

- Red flag.  Red flags indicate that quantity is below the minimum required for safety stock.

Multiple Alert Bells Icon. 

- Alert bell.  The bell icon in a data line indicates that the data line is monitored as a target data line in at least one user-defined alert. Exceptions: alerts such as New VMI working data set selection and Average demand out of tolerance that are aimed at the customer organization rather than a single data line do not display the icon since it would apply to all data lines.

Multiple Alert Notifications Icon. 

- Alert notification.  The envelope icon in a data line indicates that alert notifications have been sent regarding that target data line.

1/2 Card. A one-card kanban loop has only replenishment cards. A two-card kanban loop has both replenishment cards and move cards.

Accumulator Type. The type of accumulator for accumulating empty kanbans that are not authorized for production: quantity, quantity and a fixed interval, quantity and a scheduled time. When the accumulator reaches the quantity/time threshold, an Order Qty of kanbans are authorized for production.

Backflush. Specifies whether the components for this loop will be backflushed.

Buyer/Planner. The code—from the item-site—identifying the buyer or planner for this kanban loop.

Card Type. In a one-card kanban system, all the cards are replenishment cards. In a two-card kanban system, there can be move cards and replenishment cards.

Consigned Qty. The total consigned quantity of an item at a site.

Note If this is a link, clicking the link displays the Consigned Inventory Detail view.

Container Capacity. The container or package size for the kanbans in this loop.

Container Type. The type of container used for items in this loop, such as tray or tub.

Daily Demand. The expected daily demand for this item.

Data Source. The origin of the kanban data, such as the name of the ERP system.

Due Date. The date the item is due.

FIFO Qty in Process. For loops where the source type is process and there are FIFO lanes defined, the number of cards in the loop that are in the In Process state. The system updates this field each time a transaction is performed on a card that belongs to the loop.

Interval Time. The time in seconds for the fixed-interval accumulator type. The accumulator checks for the threshold number of empty kanbans every Interval Time seconds.

Item Description. A text description of this item.

Item ID. The item number, name, or code from the customer ERP system or other data source.

Note When this field is a link, clicking this link opens the Item Detail view.

Kanban Quantity. The number of items in each replenishment kanban.

Loop Status and Card State. The colors of the card icons indicate the state—Full, Empty, Shipped, and so on—of each kanban.

- Full.  The kanban container is full and available for consumption.
- Hold.  The kanban container is full but it is not available for consumption.
- Shipped.  The kanban has been shipped and is currently in transit to its destination. The status changes to Shipped when the status for the associated ASN changes to Shipped. The card status may be out of sync with the ERP system if the ASN is created in QAD Supplier Portal and the status is changed to Shipped in QAD Supplier Portal.
- In process.  The kanban is part of a loop with a FIFO lane. The kanban has completed any one but the last of the sequence of FIFO processes defined for the loop. See FIFO Lane in the Glossary.
- Empty accumulator.  The kanban is empty and being accumulated; it is not yet authorized for replenishment. See Accumulator in the Glossary.
- Empty authorized.  The kanban is empty and authorized for replenishment.
- Acknowledged.  The supplying source has acknowledged the requirement to fill the empty kanban.
- Order point.  Order point for the loop.
- Safety stock.  Safety stock or minimum number of full kanbans required for the loop.

Max Buffer Size. The maximum number of inventory items in the current loop--number of active cards.

Max Cycle Time. A kanban can be considered missing if more than this number of seconds passes since the last transaction for that kanban.

Min Cycle Time. The minimum time allowed—in seconds—between kanban transactions for the same kanban card.

Next Accumulator Date. The next date that the accumulator logic will check for the threshold number of empty kanbans.

Next Accumulator Time. The time, in seconds, on Next Accumulator Date that the accumulator logic next checks for the threshold number of empty kanbans.

Number of Kanban. The total number of kanban cards—active and inactive—in the loop.

Number of Active Kanban. The number of active kanban cards in the loop.

Order Point. When the number of full kanbans in a loop falls below the order point, it triggers delivery of full kanbans from the supplying source.

Order Qty. The supplying source order quantity of items for the fixed quantity accumulator type. The accumulator checks frequently whether the number of kanbans in the empty-accumulator state * the kanban quantity (number of items in each replenishment kanban) has reached this threshold.

Print ID Barcode. Indicates whether to print the kanban ID barcode on the kanban card.

Print Item Barcode. Indicates whether to print the item number barcode on the kanban card.

Print Qty. Indicates whether the quantity should print on the kanban card.

Purchase Order. The purchase order number for obtaining this item from the supplier.

Note Clicking this link opens the Purchase Order Detail.

Purchase Order Line. The purchase order line number from the ERP database.

Quantity Mismatch Method. In combination with Rounding Threshold Percent, this method controls how unit quantities are converted to a number of kanban cards when the unit quantity is not an exact multiple of the kanban quantity. Valid values are:

- Round (the default). The system rounds the remaining quantity based on the value specified in Rounding Threshold Percent and generates kanban history records without acknowledging that rounding took place.
- Warning. The system rounds the remaining quantity as specified in Rounding Threshold Percent, and creates kanban history records without acknowledging that rounding took place.
- Error. The system does not complete processing for the loop unless the quantity specified is an exact multiple of the kanban quantity. An error message displays on the output report.

Although the Round and Warning values have the same effect in QAD Supplier Portal, the field shows which value was set in the ERP system.

QOH. Quantity on hand. The number of kanbans in the loop that are currently full.

QOH+In Transit. Quantity on hand plus number in transit. Number of full kanbans on hand plus number of kanbans that are in transit from the supplying source.

Replenishment Time. The time, in seconds, to replenish this kanban.

Rounding Threshold %. For kanban-based POs, when Quantity Mismatch Method is Round, this field indicates if the number of kanbans to be selected should be rounded up or rounded down.

- 0.00%: Always round down.
- 100.00%: Always round up.
- 0.00%<n%<100.00%: If the excess quantity is equal to or greater than this percent, the system rounds up to select an additional card. If the excess quantity is less, the system rounds down.

Safety Stock. The minimum number of full kanbans to be maintained at the supermarket for this loop.

Safety Days. Safety stock expressed as time; stock sufficient to fulfill Safety Days decimal days of demand.

Source Type. Supplying source types are supermarket, supplier, inventory, and process.

Step. The unique code for identifying the specific step that the loop represents in the entire manufacturing process for an item. Step is part of the unique identifier for each loop. Although Step may reflect routings and operations in the ERP system, it is defined independently of them.

Supermarket ID. The ID for the consuming supermarket for this loop.

Supermarket Site. The ID for the supermarket site that consumes kanban items for this loop.

Note For customers and suppliers, clicking the destination ID link displays the address detail.

Supplier. If the supplying source for the kanban loop is a supplier, this is the identifying number or ID code for the supplier. It is loaded from the ERP system or other data source.

Supplier Item ID. The supplier ID for this item.

Supplying Reference. Supplying reference is dependent on supplying source type.

- Supplier: Purchase order ID
- Inventory: Supplying supermarket ID
- Process: Process ID

Supplying Source. The supplier ID when the supplying source type is a supplier or the site ID when the supplying source type is inventory or process.

Note For customers and suppliers, clicking the link displays the address and contacts detail for suppliers and the site detail for sites.

Total Lead Time. In loops with FIFO lanes, this total includes the processing time at the primary process—the supply source—plus the cumulative processing time for all of the FIFO processes in the loop. The format is DD:HH:MM:SS, that is, days:hours:minutes:seconds.

Variability Factor. A multiplier that limits or increases the amount of inventory in the supermarket. Variability factor is a more convenient means than safety stock of responding to variations such as seasonal demand and sales promotions.

Warning Limit. A user-defined value used in evaluating the historical level of supermarket inventory for a loop. Analysis of inventory levels using warning limit and critical limit can be used as the basis for adjusting target inventory levels.

Orders View

The Orders view displays purchase order (PO) information for open, closed, and canceled POs. This data is for item-sites in the vendor managed inventory (VMI) working and kanban working data sets. For kanban items, these are released POs against a blanket order specified for a kanban loop.

Updating the Data

For information on when QAD Supplier Portal updates the various fields in the view, see “Update History”.

User-Defined Fields

User-defined fields (UDFs) can be created for the Min/Max, Kanban Board, Orders, Schedules, ASN Headers, Receipts, and Invoice views. Use Admin » Company » Company Maintenance » User Labels subtab to define labels for the fields for each of these views.

Update Icon.  Click the update icon in the far-right column to open the User-Defined Fields screen for updating the values in the user-defined fields.

Note An export feature provides users with the ability to export UDFs from QAD Supplier Portal to the Poller client. The Policies tab in Company Maintenance contains a policy to control the export feature for UDFs. See “Policies”.

Refining the View

Use column sorting as well as the Filter and Display tabs or subtabs to refine the view. All users can refine the view displays.

Sort by Column. Click the column labels to sort the data rows.

Filter and Display Tabs/Subtabs. Go to the Filter tab or subtab to specify the search criteria for selecting which items to include in the current Data tab or subtab display. Go to the Display tab or subtab to specify which columns to include in the Data display.

Creating Reports

Go to the Print tab to specify report definitions. Reports are based on the data available as a result of the Filter and Display tab refinements.

Columns/Fields

This table includes all columns/fields that are available for display in the Orders view. Not all of the available columns/fields are included in the default display.

New Document Icon. 

- Create ASN.  Create a new ASN based on this order.

Note Clicking the icon opens ASN Maintenance.

Multiple Alert Bells Icon. 

- Defined and named alerts.  The bell icon indicates that one or more alerts has been defined for the current table row.

Multiple Alert Notifications Icon. 

- Alert notification.  The envelope icon indicates that a notification for the occurrence of an alert event has been sent. QAD Supplier Portal displays this icon to only the users who received the notification.

Note For customers and suppliers, clicking the icon displays notification details.

Blanket Order. For released orders for kanban loops, this is the number of the parent blanket order associated with the loop. ASNs can be created from released orders but not from a blanket order.

Note In the Orders view, clicking the blanket order number displays the Purchase Order Detail view with information for that blanket order.

Blanket Line. For released orders for kanban loops, this is the line number of the parent blanket order that is addressed by the released PO.

Buyer. This is the buyer ID from the ERP purchase order header.

Acknowledge Status. The acknowledged state for the purchase order line, which can include following:

- Pending
- Item accepted and shipped
- Item accepted, date rescheduled
- Item accepted
- Item accepted, changes made
- Item deleted
- Item accepted, price changed
- Item accepted, quantity changed
- Re-Acknowledge

Carrier. As specified on the PO trailer; it defaults from the ERP system.

Customer. The customer name, number, or code ID.

Note Clicking this link opens the Customer Detail view.

Customer ID. Customer admin users assign this customer company business ID in Admin»Company»Company Maintenance.

CustText1-3. Labels for up to three user-defined text fields that are visible to customers only.

CustNumeric1-3. Labels for up to three user-defined numeric fields that are visible to customers only.

CustDate1-3. Labels for up to three user-defined date fields that are visible to customers only.

CustSupplierText1-3. Labels for up to three user-defined text fields that are visible to customers and suppliers.

CustSupplierNumeric1-3. Labels for up to three user-defined numeric fields that are visible to customers and suppliers.

CustSupplierDate1-3. Labels for up to three user-defined date fields that are visible to customers and suppliers.

Due Date. This is the due date for the purchase order line from the ERP.

A red cell indicates that Due Date is prior to the user's system date and Ordered Qty is greater than Received Qty.

Due Time. The time within the date in 24-hour format when the item is due to be received at the specified site.

FOB. FOB indicates where title passes to the buyer; it is often used to indicate who pays shipping charges.

In-Transit Qty. This is the total quantity for all in-transit ASNs (status = shipped) for this order line.

Note Clicking the quantity opens list of ASNs for the purchase order line.

Item. The item number, name, or code from the customer ERP system or other data source.

Note Clicking this link opens the Item Detail view.

Item Description. This is the item description from the ERP system or other data source.

Item Revision. Indicates the item revision number as specified on the PO.

Item Revision Date. The date the item was last revised.

Line. Purchase order line number from the ERP database.

Note Clicking the order line number displays the Purchase Order Line Detail view.

Memo Item. The memo item's item ID (number, name, or code) from the customer ERP system or other data source. Note that for memo items, the Item field displays a combination of the item ID and item description, but the Memo Item field lists just the item ID. To filter memo items based on item ID, click the Filter tab and use the Memo Item field rather than the Item field. (However, to filter inventory items based on item ID, use the Item field.)

Note When this field is a link, clicking this link opens the Item Detail view.

Need Date. The date when the items must be available to ship or issue to manufacturing. It should be the due date plus any inspection lead time.

Operation. The operation identifier.

Open Qty. The open quantity. If a discrete order, displays as "0". If a scheduled order, displays the quantity received.

Order. This is the purchase order number from the ERP database.

Note Clicking the order number displays the Purchase Order Detail view.

Order Date. This is the date from the PO header.

Order Qty. The total ordered on the purchase order line.

A red cell indicates that Due Date is prior to the user's system date and Ordered Qty is greater than Received Qty.

Note For accounts with the Supplier role, clicking the quantity opens ASN Maintenance.

Performance Date. The supplier promised delivery on this date.

PO Cur. This is the purchase order (PO) currency.

PO Header Comment.  Clicking a lined icon displays read-only comments from the purchase order header in the ERP system. If the icon is blank, there are no comments

PO Line Comment.  Clicking a lined icon displays read-only comments from the purchase order line in the ERP system. If the icon is blank, there are no comments

PO Start Effective Date. First date PO is effective.

PO End Effective Date. Last date PO is effective.

PO Report.  Click to display the purchase order in fixed format on the Print Purchase Order screen. Select a graph, then click OK to print.

Received Qty. This is the total received against the purchase order line. A red cell indicates that Due Date is prior to the user's system date and Ordered Qty is greater than Received Qty.

Note Clicking the quantity opens the Receipts view.

Refresh Date. This is the most recent time—date, time, time zone—the record was updated in the Supplier Portal database.

For ASNs, the field displays a refresh date only if the ASN was created outside of QAD Supplier Portal; if the ASN was created in QAD Supplier Portal, the field is blank.

Revision. The revision level of the purchase order can optionally be incremented with each change to the purchase order.

Revision Date. The date the purchase order was last revised.

Sales Order/Job. This optional code associates an order line with a specific sales or job number.

Scheduled. A check mark indicates that the line is from a scheduled purchase order.

Note Clicking the quantity opens a list of active schedules for the purchase order line.

Ship To. The site (from the purchase order header) that originated the order and sets the default for the line-item receiving site.

Note Clicking the address code displays the Ship-to Address Detail view.

Ship-to Name. Ship-to names attached to new receipts in the ERP system are updated in QAD Supplier Portal as frequently as every five minutes. All ship-to names are updated no more than once per hour in the general VMI or kanban working data set updates from the ERP system.

Site. The line-item site, where the purchased items are received. This can be different for each line. Optionally, you can specify a different site when you receive the line.

Note Clicking the site ID link displays the Site Detail view.

Status. Icons indicate order status.

- Open. 
- Closed. 
- Canceled. 
- Purchase order type = supplier schedule. 

Supplier. Supplier name is from the ERP database. Note that during load operations for the VMI poller, if the supplier on a purchase order is changed and if the purchase order has any transactions (such as receipts or ASNs) or if the purchase order is a scheduled order, the supplier will not be changed on the purchase order.

Note Clicking the supplier name link displays the Supplier Address Detail view.

Supplier ID. This supplier business ID is loaded from the ERP system or other data source.

Supplier Item Description. The item description used by the supplier can be brought into the QAD Supplier Portal database through the Integration Kit as the SupplierItemDescription element; this description is not available from MFG/PRO.

This description is displayed only when it is different from the item description.

Supplier Item ID. The item number, name, or code used by the supplier. This is only displayed when it is different from the item ID from the ERP system.

QAD Supplier Portal Comment.  Allows suppliers and customers to edit and view a QAD Supplier Portal-specific comment related to each purchase order line.

Note For customers and suppliers, clicking this icon displays the Add/Edit Purchase Order Line QAD Supplier Portal Comment screen.

Taxable. Indicates whether the purchase order line is subject to tax.

Note Tax-related fields are only available when Tax Info Loading Policy is set to Allow Tax Info Loading in Admin » Company » Company Maintenance » Policies.

Tax In. Indicates whether tax is included in the price.

Tax Rate %. Specifies the tax rate percentage associated with a taxable line, based on a group of tax parameters on a PO line: Tax Usage, Tax Class, Tax Environment.

Type. Identifies the purchase order line item type.

- **I** Inventory
- **S** Sub-contract
- **B** Blanket
- **M** Memo

UM. Most quantities are expressed in the unit of measure from the PO line; the exception is In-Transit Qty, which is expressed in the unit of measure used for item stocking.

Unit Cost. This is the unit cost from the line item. Not visible in Supplier mode.

PO Discount Rate. Discount rate for line item. Not visible in Supplier mode.

Net Unit Cost. Cost of unit with discount (if any) applied.

Message Icon.  Indicates whether any collaboration messages are available for a given item. For a given item, a yellow message icon indicates one or more messages are available and a white message icon indicates no messages are available.

Note Click to open a message.

Update Icon.  Update user-defined data. There are text, numeric, and date fields for user-defined data in a number of views. Use Admin » Company » Company Maintenance, User Labels subtab to define labels for the fields.

Note Click to open the User Defined Fields screen for the current view.

Work Order ID. The work order identifier.

Schedules View

Go to Schedules»Schedules to display supplier schedule data including quantities and dates. This data is for item-sites in the vendor managed inventory (VMI) working data set.

Updating the Data

For information on when QAD Supplier Portal updates the various fields in the view, see “Update History”.

User-Defined Fields

User-defined fields (UDFs) can be created for the Min/Max, Kanban Board, Orders, Schedules, ASN Headers, Receipts, and Invoice views. Use Admin » Company » Company Maintenance » User Labels subtab to define labels for the fields for each of these views.

Update Icon.  Click the update icon in the far-right column to open the User-Defined Fields screen for updating the values in the user-defined fields.

Note An export feature provides users with the ability to export UDFs from QAD Supplier Portal to the Poller client. The Policies tab in Company Maintenance contains a policy to control the export feature for UDFs. See “Policies”.

Refining the View

Use column sorting as well as the Filter and Display tabs or subtabs to refine the view. All users can refine the view displays.

Sort by Column. Click the column labels to sort the data rows.

Filter and Display Tabs/Subtabs. Go to the Filter tab or subtab to specify the search criteria for selecting which items to include in the current Data tab or subtab display. Go to the Display tab or subtab to specify which columns to include in the Data display.

Creating Reports

Go to the Print tab to specify report definitions. Reports are based on the data available as a result of the Filter and Display tab refinements.

On the Active Schedules Report subtab, specify whether to include lines with zero required quantities in the MFG/PRO style schedule report.

Select whether to display the Delivery Date or Ship Date in the report. This date will either be retrieved from the database, or if it is not present in the database, calculated based on the Transportation Days field, if the Recalculate Shipping Data policy is enabled on the Company page for this company. (This is the default policy.) If the Recalculate Shipping Date policy is not enabled, the date will not be recalculated.

There is an Adobe Acrobat icon at the top of this report for saving or printing the report in PDF format.

Columns/Fields

This table includes all columns/fields that are available for display in the Schedules view. Not all of the available columns/fields are included in the default display.

Multiple Alert Bells Icon. 

- **Alert Bell Icon.**  The bell icon in a data line indicates that the data line is monitored as a target data line in at least one user-defined alert. Exceptions: alerts such as New VMI working data set selection and Average demand out of tolerance that are aimed at the customer organization rather than a single data line do not display the icon since it would apply to all data lines.

Multiple Alert Notifications Icon. 

- **Alert Notification Icon.**  The envelope icon in a data line indicates that alert notifications have been sent regarding that target data line.

New Document Icon.  Click to create a new ASN. Opens ASN Maintenance.

Active End Date. The schedule release is no longer active, that is, it is no longer in effect after this date.

Active Start Date. The schedule release is active, that is, it is in effect on this date.

Authorized Fabrication Quantity. Customers commit to pay for this quantity of units.

Authorized Raw Material Quantity. Customers commit to pay for the raw materials purchased to make this quantity of finished goods.

Buyer. This is the buyer ID from the ERP purchase order header.

Carrier. As specified on the PO trailer; it defaults from the ERP system.

CUM Qty. From the ERP database, this is the cumulative required quantity of previous release entries + the required quantity for this release entry, that is, the cumulative quantity that should be received when this entry is received.

Note If this is a link, clicking the link opens ASN Maintenance.

Cum Start. Current CUM quantities include requested deliveries from this date forward.

Customer. The customer name or description.

Note If this is a link, clicking the link opens the Customer Detail view.

Customer ID. Customer admin users assign this customer company business ID in Admin»Company»Company Maintenance.

CustText1-3. Labels for up to three user-defined text fields that are visible to customers only.

CustNumeric1-3. Labels for up to three user-defined numeric fields that are visible to customers only.

CustDate1-3. Labels for up to three user-defined date fields that are visible to customers only.

CustSupplierText1-3. Labels for up to three user-defined text fields that are visible to customers and suppliers.

CustSupplierNumeric1-3. Labels for up to three user-defined numeric fields that are visible to customers and suppliers.

CustSupplierDate1-3. Labels for up to three user-defined date fields that are visible to customers and suppliers.

Delivery Date. The customer requires delivery on this date.

Delivery Time. The customer requires delivery at this time.

End Effective Date. The schedule is no longer valid, that is, it is no longer in effect after this date.

Fabrication Authorization Days. Customers commit to pay for goods fabricated according to the schedule for this many days of the schedule.

Fabrication Quantity End Date. The last date of the period for the authorized fabrication quantity.

Fabrication Quantity Start Date. The start date of the period for the authorized fabrication quantity.

Firm Days Period from Prior Cum. Date in which any change to the schedule must be made manually by the ordering planner.

FOB. FOB (Free On Board) indicates where title passes to the buyer; it is often used to indicate who pays shipping charges.

Item ID. The item number, name, or code from the customer ERP system or other data source.

Note When this field is a link, clicking this link opens the Item Detail view.

Item Revision. This is the item revision number as specified on the PO.

Item Revision Date. This is the date of the item revision number as specified on the PO.

Last CUM Receipt Qty. The most recent sum of all receipts against a purchase order line.

Last Receipt Date. This is the effective date of the most recent receipt against this schedule.

Note If this field is a link, clicking the link displays the Receipt Line Detail view.

Last Receipt Qty. This is the most recent quantity received against the purchase order line.

Note If this field is a link, clicking the link displays the Receipt Line Detail view.

Last Receiver. This is the number assigned to the most recent receiving record, the receiver, created by a receipt against a purchase order.

Note If this field is a link, clicking the link displays the Receipt Line Detail view.

Last Shipper ID. This is the identifying number for the most recent shipper record against this schedule.

Line. The schedule order line number is from the ERP database.

Note Clicking the order line number displays the Scheduled Order Line Detail view.

Maximum Order Quantity. This is the maximum order quantity that is authorized to be shipped against the scheduled order.

Net Required Qty. This is not a database field; it is calculated locally taking into account receipts made against the scheduled order line. Supplier Portal displays the Net Required Qty or the Required Qty, whichever is lower. The red cell indicates that Net Req Qty is greater than zero and Delivery Date is prior to the user's system date.

Operation. The operation identifier.

Order. This is the purchase order number from the ERP database.

Note When there is a link, clicking the order number displays the Purchase Order Detail view with information for that order.

Period. This is the interval that the scheduled quantity covers. Valid values: Day, Week, Month

PO End Effective Date. Last date PO is effective.

PO Start Effective Date. First date PO is effective.

Prior CUM Date. This is the ending date of the period summed to produce Prior Cum Qty.

Prior CUM Qty. This is the total of previous requests for shipments—schedule releases—up to and including PriorCumDate.

Prior Net Required Qty. This is not a database field; it is calculated locally taking into account receipts made against the scheduled order line.

$$\text{Prior Net Req Qty} = \text{Prior Cum Qty} - \text{Cum Rcvd Qty}$$

The red cell indicates that Prior Net Req Qty is greater than zero.

Quantity Qualifier. This value specifies whether the requirement quantity is firm or still in the planning stages.

Raw Material Authorization Days. Customers commit to pay for raw materials purchased to meet the schedule for this many days of the schedule.

Raw Material Qty End Date. This is the last day of the date range for raw material authorization days.

Raw Material Qty Start Date. This is the first day of the date range for raw material authorization days.

Reference. This is the reference number of the scheduled receipt. Schedule detail records are uniquely identified with the combination of Date, Time, and Reference number.

Refresh Date. This is the most recent time—date, time, time zone—the record was updated in the QAD Supplier Portal database.

For ASNs, the field displays a refresh date only if the ASN was created outside of Supplier Portal; if the ASN was created in Supplier Portal, the field is blank.

Release. This is the number of the release against the supplier schedule order.

Note If this is a link, clicking the release number link displays the Schedule Line Detail view.

Release Status. Icons indicate schedule status.

- Active. 
- Inactive. 

A release is active until it is superseded by a new release of the schedule.

Required Qty. The required quantity is from the schedule detail.

A green cell indicates Firm required quantities.

Note Clicking the Required Qty link displays the Schedule Detail view.

Revision. The revision level of the purchase order can optionally be incremented with each change to the purchase order.

Revision Date. The date of the last revision to the purchase order.

Safety Lead Time. For perpetually late or unreliable suppliers, this is the number of days before the actual need date that the schedule requests delivery.

Schedule Date. The date associated the schedule.

Schedule Days. For planning, this is the number of days for which order detail is given in daily quantities.

Schedule Months. For planning, this is the number of months that the schedule is given in monthly quantities.

Schedule Time. The time associated with the schedule.

Schedule Type. Icons indicate the type of schedule.

- Combined, non-PRO/PLUS schedules. 
- Planning. 
- Shipping. 
- Forecasted, Other. 

Clicking the icon displays a report with the supplier schedule detail for that row. Go to the Print tab to create a report with supplier schedule details for all active schedules with non-zero requirements for suppliers on all pages—as defined by Rows per Page—in the view.

Schedules can be printed when the Print Schedule flag is true (or yes). For the MFG/PRO poller, this flag can be set in Schedule Maintenance. For the Integration Kit poller, this flag can be set by specifying the value in the PrintSchd XML element. The Schedule Type icon will be enabled to print the report when the Print Schedule flag is set to true (or yes). In the Print tab, the Active Schedule Report option is available when the Print Schedule flag is set to true (or yes).

Line Graph Icon.  Click the line graph icon for a schedule to display the Schedule Graph Option screen. Select a graph and click OK.

Schedule Weeks. For planning, this is the number of weeks that the schedule is given in weekly quantities.

Ship Date. When the customer ERP system is MFG/PRO, the ship dates displayed in the Schedules view are the same as those in the schedule report accessed through the schedule type icon or the Print tab.

These dates are based on transportation lead time and the schedule horizon—numbers of days, weeks, and months for quantity bucketing—defined for each schedule order line and used in reports and releases for the order line.

If the ship date for a line is beyond the schedule horizon defined for the order line, no ship date is displayed in the Schedules view.

For all other ERP systems, the ship date displayed in the Schedules view is the date supplied by the ERP system.

Ship Delivery Pattern ID. The ID code for the defined pattern of days of the week or month that deliveries can be received at the site.

Ship Delivery Pattern Name. The name for the defined pattern of days of the week or month that deliveries can be received at the site.

Ship Time. When the customer ERP system is MFG/PRO, the ship times displayed in the Schedules view are the same as those in the schedule report accessed through the schedule type icon or the Print tab.

For all other ERP systems, the ship time displayed in the Schedules view is the time supplied by the ERP system.

Ship To. The address code for the ship-to address is from the ERP database.

Ship-to names attached to new receipts in the ERP system are updated in QAD Supplier Portal as frequently as every five minutes. All ship-to names are updated no more than once per hour in the general working data set update from the ERP system.

Note When this field is a link, clicking the link displays the Ship-to Address Detail view.

Ship-to Name. This is the name of the ship-to site or information about the site from the customer ERP system or other data source.

Ship-to names attached to new receipts in the ERP system are updated in Supplier Portal as frequently as every five minutes. All ship-to names are updated no more than once per hour in the general VMI working data set update from the ERP system.

Site. Site ID is from the ERP database. Only sites associated with suppliers in the VMI working data set are visible.

Note Clicking the site ID link displays the Site Detail view.

Standard Pack Quantity. The multiple in which orders for this item are shipped; for example, a box of 144 pencils.

Start Effective Date. The schedule is valid, that is, in effect on this date.

Supplier. The supplier name or description is loaded from the ERP system or other data source. Note that during load operations for the VMI poller, if the supplier on a purchase order is changed and if the purchase order has any transactions (such as receipts or ASNs) or if the purchase order is a scheduled order, the supplier will not be changed on the purchase order.

Supplier ID. The identifying number or ID code for a supplier is loaded from the ERP system or other data source. For VMI items, only suppliers associated with item-sites in the VMI working data set are available in the views.

Note When this field is a link, clicking the link opens the Supplier Address Detail view.

Supplier Item Description. The item description used by the supplier can be brought into the QAD Supplier Portal database through the Integration Kit as the SupplierItemDescription element; this description is not available from MFG/PRO.

This description is displayed only when it is different from the item description.

Supplier Item ID. The item number, name, or code used by the supplier. This is only displayed when it is different from the item ID from the ERP system.

Transportation Lead Time. When the supplier makes but does not deliver the units, this is the number of days of transport from the supplier location to the delivery location.

UM. The unit of measure for quantities is from the purchase order line.

Unit Cost. This is the entered or default unit cost for the line item. If no cost is entered in the ERP system, the system uses the default cost from price and discount tables, supplier quotes, or the general ledger material cost for the item.

Message Icon.  Indicates whether any collaboration messages are available for a given item. For a given item, a yellow message icon indicates one or more messages are available and a white message icon indicates no messages are available.

Note Click to open a message.

Update Icon.  Update user-defined data. There are text, numeric, and date fields for user-defined data in a number of views. Use Admin » Company » Company Maintenance, User Labels subtab to define labels for the fields.

Note Click to open the User Defined Fields screen for the current view.

Work Order ID. The work order identifier.

Shipping Forecast View

Go to Schedules » Shipping Forecasts to display forecasts for item-sites in the vendor managed inventory (VMI) working data set.

Customers review Schedules » Shipping Forecasts to refine expectations and adjust plans.

Suppliers generate shipping forecasts based on released supplier schedules from customers. The forecasts reflect the supplier's expected response to the demand in the shipping schedules. Having the information available from both supplier schedules (demand) and shipping forecasts (supply) enhances the ability of customers and suppliers to coordinate their activities.

Suppliers use the Import button to open the Import dialog for specifying the shipping forecasts file to import. For information on formatting and importing shipping forecasts, see “Importing Shipping Forecasts”.

Updating the Data

For information on when QAD Supplier Portal updates the various fields in the view, see “Update History”.

User-Defined Fields

User-defined fields (UDFs) can be created for the Min/Max, Kanban Board, Orders, Schedules, ASN Headers, Receipts, and Invoice views. Use Admin » Company » Company Maintenance » User Labels subtab to define labels for the fields for each of these views.

Update Icon.  Click the update icon in the far-right column to open the User-Defined Fields screen for updating the values in the user-defined fields.

Note An export feature provides users with the ability to export UDFs from QAD Supplier Portal to the Poller client. The Policies tab in Company Maintenance contains a policy to control the export feature for UDFs. See “Policies”.

Refining the View

Use column sorting as well as the Filter and Display tabs or subtabs to refine the view. All users can refine the view displays.

Sort by Column. Click the column labels to sort the data rows.

Filter and Display Tabs/Subtabs. Go to the Filter tab or subtab to specify the search criteria for selecting which items to include in the current Data tab or subtab display. Go to the Display tab or subtab to specify which columns to include in the Data display.

Creating Reports

Go to the Print tab to specify report definitions. Reports are based on the data available as a result of the Filter and Display tab refinements.

Columns/Fields

This table includes all columns/fields that are available for display in the Shipping Forecasts view. Not all of the available columns/fields are included in the default display.

Buyer. This is the buyer ID from the ERP purchase order header.

Cum Quantity. The is sum of quantities from previous forecast entries and the current Quantity, that is, it is the quantity that should have been shipped when this entry is shipped.

Customer. The customer name or description.

Note If this is a link, clicking the link opens the Customer Detail view.

Customer ID. Customer admin users assign this customer company business ID in Admin » Company » Company Maintenance.

Delivery Date. The customer requires delivery on this date.

Item ID. The item number, name, or code from the customer ERP system or other data source.

Note When this field is a link, clicking this link opens the Item Detail view.

Line. Purchase order line number from the ERP database.

Note If this field is a link, clicking the order line number displays the Purchase Order Line Detail view.

Order Number. The purchase order number is from the ERP database.

Note Clicking the order number link displays the Purchase Order Detail view.

Quantity. This is the quantity the supplier is planning to ship.

Note If this is a link, clicking the quantity link displays the Shipping Forecast Detail view.

Ship Date. This is the date the supplier is expected to ship. It is an approximation based on delivery date and the transportation lead time.

Ship To. The address code for the ship-to address is from the ERP database.

Ship-to names attached to new receipts in the ERP system are updated in QAD Supplier Portal as frequently as every five minutes. All ship-to names are updated no more than once per hour in the general working data set update from the ERP system.

Note When this field is a link, clicking the link displays the Ship-to Address Detail view.

Site. Site ID is from the ERP database. Only sites associated with suppliers in the VMI working data set are visible.

Note Clicking the site ID link displays the Site Detail view.

Supplier. The supplier name or description is loaded from the ERP system or other data source. Note that during load operations for the VMI poller, if the supplier on a purchase order is changed and if the purchase order has any transactions (such as receipts or ASNs) or if the purchase order is a scheduled order, the supplier will not be changed on the purchase order.

Supplier ID. The identifying number or ID code for a supplier is loaded from the ERP system or other data source. For VMI items, only suppliers associated with item-sites in the VMI working data set are available in the views.

Note When this field is a link, clicking the link opens the Supplier Address Detail view.

UM. The unit of measure for quantities is from the purchase order line.

Shipping Forecast Load

Use the Shipping Forecast Load screen to import shipping forecast data from XML or flat files. QAD Supplier Portal displays the data in Schedules » Shipping Forecasts.

To load a import file:

- 1 In the File field, specify the import file: use the Browse button to select the file.
- 2 If you would like to have any warnings displayed, click the Display Warnings checkbox.
- 3 If you would like to have any informational messages displayed, click the Display Information Messages checkbox.
- 4 Click the Load button to load the import file.
- 5 To view any log messages, click the View Log button.

Forecast Graphs

Two graphs of forecast data are available from the Schedules view: a comparison of active and inactive forecasts and a comparison of forecast and usage. Both graphs observe these constraints:

- The active schedule must be of the type planning, shipping, or aggregate.
- The first week is ignored if it is a partial week.
- Weekly forecasts start from Monday.
- Monthly forecasts start from the first Monday of the month.



In the Schedules view, click the line graph icon for a schedule to display the Schedule Graph Option screen. Select a graph and click OK.

After displaying either of the graphs, click Export to display the Reports screen. Enter the title, file name, format, and page orientation; then, click Run to create the report. For details, see “Data Reports for Graphs”.

Forecast Comparison Graph

This graph compares the forecast summary—830 planning schedule, 862 shipping schedule—of the current active schedule with that of the previous schedule, for the future quarter of up to 13 weeks.

There is also a data table showing the quantities for active and inactive schedules for each week. If there is no inactive schedule, the inactive quantities are shown as zero.

Forecast, Usage, and Trend Line Graph

This graph compares the forecast summary—830 planning schedule, 862 shipping schedule—with the average actual daily usage (AADU). It also shows a trend line for AADU. For the trend line, the y-intercept and the slope are calculated using the least squares method.

The default is to display all data for the selected schedule from up to 26 weeks in the past to up to 26 weeks in the future. To restrict the time frame, at the top of the graph select the number of weeks—6, 13, 26—to display; then click Go. These are actual weeks—not calendar weeks.

ASNs View

The ASNs view displays advance ship notice information for only those ASNs that have both header and detail information in the database. ASNs that have only the header defined are not visible in this tab view.

The view displays ASNs from multiple sources to increase the visibility of in-transit inventory.

Updating the Data

For information on when QAD Supplier Portal updates the various fields in the view, see “Update History”.

User-Defined Fields

User-defined fields (UDFs) can be created for the Min/Max, Kanban Board, Orders, Schedules, ASN Headers, Receipts, and Invoice views. Use Admin » Company » Company Maintenance » User Labels subtab to define labels for the fields for each of these views.

Update Icon.  Click the update icon in the far-right column to open the User-Defined Fields screen for updating the values in the user-defined fields.

Note An export feature provides users with the ability to export UDFs from QAD Supplier Portal to the Poller client. The Policies tab in Company Maintenance contains a policy to control the export feature for UDFs. See “Policies”.

Refining the View

Use column sorting as well as the Filter and Display tabs or subtabs to refine the view. All users can refine the view displays.

Sort by Column. Click the column labels to sort the data rows.

Filter and Display Tabs/Subtabs. Go to the Filter tab or subtab to specify the search criteria for selecting which items to include in the current Data tab or subtab display. Go to the Display tab or subtab to specify which columns to include in the Data display.

Creating Reports

Go to the Print tab to specify report definitions. Reports are based on the data available as a result of the Filter and Display tab refinements.

Field Definitions

Status. The icons in the first column indicate the status of the ASN. The alerts-related icons display in the next two columns.

Multiple Alert Bells Icon. 

- **Alert Bell Icon.**  The bell icon in a data line indicates that the data line is monitored as a target data line in at least one user-defined alert. Exceptions: alerts such as New VMI working data set selection and Average demand out of tolerance that are aimed at the customer organization rather than a single data line do not display the icon since it would apply to all data lines.

Multiple Alert Notifications Icon. 

- **Alert Notification Icon.**  The envelope icon in a data line indicates that alert notifications have been sent regarding that target data line.

Actual Delivery Date. The actual date of the delivery. This field is updated automatically by matching receipt information imported from the ERP. This field can not be updated directly from the ASN screen.

ASN Number. A unique identifier for the advanced shipment notices.

Note Clicking the ASN number displays the ASN screen.

Line. ASN line number.

Buyer. This is the buyer ID from the ERP purchase order header.

Carrier. The name of the carrier transporting the material.

Carrier Reference. The carrier's unique number to identify the shipment.

Create Date. The date and time the ASN was created.

Cum Quantity Shipped. The is sum of quantities from previous forecast entries and the current Quantity that is shipped.

Imported. Yes indicates that the ASN was imported from MFG/Pro or the Integration Kit. No indicates that the ASN was created in Supplier Portal or loaded into Supplier Portal using the Import functionality.

Item ID. The item number, name, or code from the customer ERP system or other data source.

Note When this field is a link, clicking this link opens the Item Detail view.

Item Description. This is the item description from the ERP system or other data source.

Line. Purchase order line number from the ERP database.

Note If this field is a link, clicking the order line number displays the Purchase Order Line Detail view.

Lot/Serial. This inventory transaction is associated with this lot/serial number. Lot/serial numbers facilitate tracking of all transactions associated with a sales or purchase order.

Mismatch Type. Indicates mismatching between receipts and ASNs. When QAD Supplier Portal matches receipts to ASNs, QAD Supplier Portal tags an ASN if the Shipper ID on the receipt does not match the Shipper ID on the ASN and if the quantity received on the receipt does not match the quantity shipped on the ASN.

Order. This is the purchase order number from the ERP database.

Note When there is a link, clicking the order number displays the Purchase Order Detail view with information for that order.

Order Qty. The quantity of the item ordered on this line.

Possible Receipt Date. Indicates the possible receipt date for an ASN in the event of a mismatch.

Possible Receiver Line. Indicates the possible receiver line for the ASN in the event of a mismatch.

Possible Receiver Number. Indicates the possible receiver number for an ASN in the event of a mismatch.

Reference. The lot reference provides additional information about the lot.

Received Qty. This is the quantity of the item received (compare with Ship Qty).

Refresh Date. This is the most recent time—date, time, time zone—the record was updated in the QAD Supplier Portal database.

For ASNs, the field displays a refresh date only if the ASN was created outside of QAD Supplier Portal; if the ASN was created in QAD Supplier Portal, the field is blank.

Ship Date. The ship date comes from MFG/PRO; it refers to time of shipment. If the ASN status is incomplete, it is the expected ship date. If the ASN status is shipped, it is the actual ship date.

Shipper ID. The ID is the identifying number for the shipper record.

Ship Qty. The quantity of the item shipped.

Note Clicking the ship quantity displays the ASN detail.

Ship To. The address code for the ship-to address is from the ERP database.

Ship-to names attached to new receipts in the ERP system are updated in QAD Supplier Portal as frequently as every five minutes. All ship-to names are updated no more than once per hour in the general working data set update from the ERP system.

Note When this field is a link, clicking the link displays the Ship-to Address Detail view.

Ship-to Name. This is the name of the ship-to site or information about the site from the customer ERP system or other data source.

Ship-to names attached to new receipts in the ERP system are updated in QAD Supplier Portal as frequently as every five minutes. All ship-to names are updated no more than once per hour in the general VMI working data set update from the ERP system.

Site. The code for the site where the item is to be delivered.

Note Clicking this link opens the Site Detail view.

Status.

- Incomplete. 
- Pre-Ship. 
- Shipped, Not exported. 
- Shipped, Exported, and Confirmed. 
- Shipped, Exported. 
- Received, not exported. 
- Received, export confirmed. 
- Received, exported. 
- Forecasted. 
- Canceled. 
- Shipped and being tracked with QAD TMS. Click icon to access QAD TMS. 

Once Status is changed to Shipped, you cannot make any other changes to the ASN.

For ASN created manually or imported into QAD Supplier Portal by suppliers, users logged in as customers or consolidated customers can change the status for an ASN to Canceled. These same users can change the status from Canceled to Shipped or Received.

Supplier. The supplier name or description is loaded from the ERP system or other data source. Note that during load operations for the VMI poller, if the supplier on a purchase order is changed and if the purchase order has any transactions (such as receipts or ASNs) or if the purchase order is a scheduled order, the supplier will not be changed on the purchase order.

Supplier ID. The identifying number or ID code for a supplier is loaded from the ERP system or other data source. For VMI items, only suppliers associated with item-sites in the VMI working data set are available in the views.

Note When this field is a link, clicking the link opens the Supplier Address Detail view.

Supplier Business ID. This field is relevant only for consolidated accounts with multiple linked supplier accounts. The supplier business ID—set by the supplier in Admin » Company » Company—differentiates data for the same supplier from multiple ERP systems or data sources.

The default is the supplier identifying number or ID code that is loaded in QAD Supplier Portal from the customer's ERP system or other data source.

Target Delivery Date. The date when you expect the shipment to arrive to your customer. QAD Supplier Portal provides a default date, equal to the ship date plus one day.

Original Target Delivery Date. The original date when you expect the shipment to arrive to your customer. QAD Supplier Portal provides a default date, equal to the ship date plus one day.

Transportation Mode. The particular form of transportation being used.

UM. Quantities are expressed in the unit of measure used for item stocking.

UM Conversion. The conversion factor to use if the UM for the line differs from the UM in the item master definition in the ERP system.

ASN Detail Views

ASN Number. A unique identifier for the advanced shipment notices.

Note Clicking the ASN number displays the ASN screen.

Ship To. The address code for the ship-to address is from the ERP database.

Ship-to names attached to new receipts in the ERP system are updated in QAD Supplier Portal as frequently as every five minutes. All ship-to names are updated no more than once per hour in the general working data set update from the ERP system.

Note When this field is a link, clicking the link displays the Ship-to Address Detail view.

Status.

- Incomplete. 
- Pre-Ship. 
- Shipped, Not exported. 
- Shipped, Exported, and Confirmed. 
- Shipped, Exported. 
- Received, not exported. 
- Received, export confirmed. 
- Received, exported. 
- Forecasted. 
- Canceled. 
- Shipped and being tracked with QAD TMS. Click icon to access QAD TMS. 

Once Status is changed to Shipped, you cannot make any other changes to the ASN.

For ASN created manually or imported into QAD Supplier Portal by suppliers, users logged in as customers or consolidated customers can change the status for an ASN to Canceled. These same users can change the status from Canceled to Shipped or Received.

Ship Date. The ship date comes from MFG/PRO; it refers to time of shipment. If the ASN status is incomplete, it is the expected ship date. If the ASN status is shipped, it is the actual ship date.

Target Delivery Date. The date when you expect the shipment to arrive to your customer. QAD Supplier Portal provides a default date, equal to the ship date plus one day.

Reference Links. Clicking this button displays the Reference Link screen. The Reference Link screen lets you associate Uniform Resource Locators (URLs) with purchase order headers.

ASN Header & Lines

Line. ASN line number.

Item ID. The item number, name, or code from the customer ERP system or other data source.

Note When this field is a link, clicking this link opens the Item Detail view.

Shipper ID. The ID is the identifying number for the shipper record.

Order. This is the purchase order number from the ERP database.

Note When there is a link, clicking the order number displays the Purchase Order Detail view with information for that order.

Ship From. The ship-from site's DUNS Number. Use the lookup to select from all ship-from DUNS numbers defined by the supplier in Admin » Company » Partners Maintenance » Ship From DUNS Number.

Manufacturer. The manufacturer's DUNS number. Use the lookup to select from manufacturer DUNS numbers defined by the supplier in Admin » Company » Partners Maintenance » Manufacturer DUNS Number.

Remark. A remark that applies to the ASN header.

Heat. The heat code of the item on the ASN line.

Expired Date. The expired date of the item on the ASN line.

Manufacture Date. The manufacture date of the item on the ASN line.

User Defined Fields. Fields defined by the user for this item. See "User-Defined Fields".

ASN Line Remark. A remark that applies to the ASN line.

A user can edit the ASN Line Remark field if logged on to Supplier Portal as a supplier and if the ASN status is Incomplete.

Containers

Line. ASN line number.

Item ID. The item number, name, or code from the customer ERP system or other data source.

Note When this field is a link, clicking this link opens the Item Detail view.

Shipper ID. The ID is the identifying number for the shipper record.

Order. This is the purchase order number from the ERP database.

Note When there is a link, clicking the order number displays the Purchase Order Detail view with information for that order.

Labels

Line. ASN line number.

Item ID. The item number, name, or code from the customer ERP system or other data source.

Note When this field is a link, clicking this link opens the Item Detail view.

Shipper ID. The ID is the identifying number for the shipper record.

Order. This is the purchase order number from the ERP database.

Note When there is a link, clicking the order number displays the Purchase Order Detail view with information for that order.

Serial Number. This field displays the serial number that identifies each package and pallet for the shipper. Both customers and suppliers can use serial numbers to track items in their ERP systems. Serial numbers are sequential and are stored in the package record.

Note Serial numbers cannot be duplicated, unless the old serial number is more than one year old.

Click the Generate Serial Numbers button to have the system generate serial numbers for the containers or packages.

Suppliers can manually edit serial numbers if the ASN Serial Number editable for suppliers field is set to Editable in Admin » Company » Company Maintenance » Preferences. See page 156 for more information.

Important If no option has been selected in the ASN Serial Numbers editable for supplier field, no restrictions apply and suppliers can manually edit serial numbers.

Tracking

Line. ASN line number.

Item ID. The item number, name, or code from the customer ERP system or other data source.

Note When this field is a link, clicking this link opens the Item Detail view.

Shipper ID. The ID is the identifying number for the shipper record.

Order. This is the purchase order number from the ERP database.

Note When there is a link, clicking the order number displays the Purchase Order Detail view with information for that order.

Receipts View

This data is for item-sites in the vendor managed inventory (VMI) and kanban working data sets.

Matching Receipts with ASNs

When the value in the Receipts view Shipper ID column is the shipper ID from the ASN line, the status of that ASN changes to received. There are several ways to populate this field:

- In MFG/PRO when using PO Shipper Receipt, enter the shipper ID from the ASN line in the Shipper ID field.
- In MFG/PRO when using Purchase Order Receipts, enter the shipper ID from the ASN line in the Packing Slip field.
- For other ERP systems, populate the receipt Shipper ID field with the shipper ID from the ASN line.

Updating the Data

For information on when QAD Supplier Portal updates the various fields in the view, see “Update History”.

Refining the View

Use column sorting as well as the Filter and Display tabs or subtabs to refine the view. All users can refine the view displays.

Sort by Column. Click the column labels to sort the data rows.

Filter and Display Tabs/Subtabs. Go to the Filter tab or subtab to specify the search criteria for selecting which items to include in the current Data tab or subtab display. Go to the Display tab or subtab to specify which columns to include in the Data display.

User-Defined Fields

User-defined fields (UDFs) can be created for the Min/Max, Kanban Board, Orders, Schedules, ASN Headers, Receipts, and Invoice views. Use Admin » Company » Company Maintenance » User Labels subtab to define labels for the fields for each of these views.

Update Icon.  Click the update icon in the far-right column to open the User-Defined Fields screen for updating the values in the user-defined fields.

Note An export feature provides users with the ability to export UDFs from QAD Supplier Portal to the Poller client. The Policies tab in Company Maintenance contains a policy to control the export feature for UDFs. See “Policies”.

Creating Reports

Go to the Print tab to specify report definitions. Reports are based on the data available as a result of the Filter and Display tab refinements.

Creating Draft Invoices

If Draft Invoices functionality is in use, Supplier users see a check box at the left side of each receipt record in the main view.

To create draft invoices, select the check box for each line that should have a draft invoice created. Then, click Create Draft Invoice.

For more information, see “Draft Invoices” on page 84.

Columns/Fields

This table includes all columns/fields that are available for display in the Receipts view. Not all of the available columns/fields are included in the default display.

Buyer. This is the buyer ID from the ERP purchase order header.

CUM Receipt Qty. The sum of all receipts against a purchase order line.

Customer. The customer name or description.

Note If this is a link, clicking the link opens the Customer Detail view.

Customer ID. Customer admin users assign this customer company business ID in Admin»Company»Company Maintenance.

DI Available Status. The system indicates the availability of the line for placing on a Draft Invoice:

Open: Open Qty = Received Qty

Partial Open: Open Qty > 0 and < Received Qty

Closed: Open Qty = 0

Blank: Draft Invoice not allowed for customer or supplier

This field is available only when Supplier Create Draft Invoice Policy is Allow at the customer level and Default at the supplier level.

Item ID. The item number, name, or code from the customer ERP system or other data source.

Note When this field is a link, clicking this link opens the Item Detail view.

Item Description. This is the item description from the ERP system or other data source.

Line. Purchase order line number from the ERP database.

Note If this field is a link, clicking the order line number displays the Purchase Order Line Detail view.

Line Receipt Qty. The quantity of the item received on this line.

Location. This is the code for the physical location where inventory is stored that is associated with this transaction.

Lot/Serial. This inventory transaction is associated with this lot/serial number. Lot/serial numbers facilitate tracking of all transactions associated with a sales or purchase order.

Memo Item. The memo item's item ID (number, name, or code) from the customer ERP system or other data source. Note that for memo items, the Item field displays a combination of the item ID and item description, but the Memo Item field lists just the item ID. To filter memo items based on item ID, click the Filter tab and use the Memo Item field rather than the Item field. (However, to filter inventory items based on item ID, use the Item field.)

Note When this field is a link, clicking this link opens the Item Detail view.

Open Qty. Received Qty - Sum Qty in the Draft Invoice.

This field is available only when Supplier Create Draft Invoice Policy is Allow at the customer level and Default at the supplier level.

Order. This is the purchase order number from the ERP database.

Note When there is a link, clicking the order number displays the Purchase Order Detail view with information for that order.

Price. This is the net unit cost for the PO line.

This field is available only when Supplier Create Draft Invoice Policy is Allow at the customer level and Default at the supplier level.

Receipt Date. This is the effective date of the inventory transaction.

Receipt Qty. Receipt Qty is updated only when there is a lot/serial allocation in the ERP receipt details.

Receiver. This is the receipt activity for the past 30 days. If there is no receipt activity in the past 30 days, it is a summary—with no detail—of all receipts prior to 30 days from today.

Note If this field is a link, clicking the link displays the Receipt Line Detail view.

Record Date. This is the date the transaction was processed.

Reference. This is the bin, roll, lot, or pallet number.

Shipper ID. The ID is the identifying number for the shipper record.

Ship To. The address code for the ship-to address is from the ERP database.

Ship-to names attached to new receipts in the ERP system are updated in QAD Supplier Portal as frequently as every five minutes. All ship-to names are updated no more than once per hour in the general working data set update from the ERP system.

Note When this field is a link, clicking the link displays the Ship-to Address Detail view.

Ship-to Name. This is the name of the ship-to site or information about the site from the customer ERP system or other data source.

Ship-to names attached to new receipts in the ERP system are updated in QAD Supplier Portal as frequently as every five minutes. All ship-to names are updated no more than once per hour in the general VMI working data set update from the ERP system.

Site. The name, number, or ID code for the site where the item was received.

Note If this field is a link, clicking this link opens the Site Detail view.

Supplier. The supplier name or description is loaded from the ERP system or other data source. Note that during load operations for the VMI poller, if the supplier on a purchase order is changed and if the purchase order has any transactions (such as receipts or ASNs) or if the purchase order is a scheduled order, the supplier will not be changed on the purchase order.

Supplier ID. The identifying number or ID code for a supplier is loaded from the ERP system or other data source. For VMI items, only suppliers associated with item-sites in the VMI working data set are available in the views.

Note When this field is a link, clicking the link opens the Supplier Address Detail view.

Taxable. Indicates whether the purchase order line is subject to tax.

Note Tax-related fields are only available when Tax Info Loading Policy is set to Allow Tax Info Loading in Admin » Company » Company Maintenance » Policies.

Tax In. Indicates whether tax is included in the price.

Tax Rate %. Specifies the tax rate percentage associated with a taxable line, based on a group of tax parameters on a PO line: Tax Usage, Tax Class, Tax Environment.

Transaction Number. This number is unique and assigned by the ERP system.

Type. Identifies the purchase order line item type.

- **I** Inventory
- **S** Sub-contract
- **B** Blanket

- **M Memo**

UM. Quantities are expressed in the unit of measure used for item stocking.

User Defined Fields. Fields defined by the user for this item. See “User-Defined Fields”.

Receipt and Receipt Line Detail

All of these detail values are from the customer’s ERP system or other data source.

Receipt Line Detail

Receiver. This is the number assigned to the receiving record, the receiver, created by a receipt against a purchase order.

Receiver Line. This is the purchase order line number vouchered on the supplier invoice that is being received.

Order Number. The purchase order number.

Link: Clicking this link opens the Purchase Order Detail view.

Line. Purchase order line number from the ERP database.

Link: If this field is a link, clicking the order line number displays the Purchase Order Line Detail view.

Customer. The customer name or description.

Link: If this is a link, clicking the link opens the Customer Detail view.

Ship To. The address code for the ship-to address is from the ERP database.

Ship-to names attached to new receipts in the ERP system are updated in QAD Supplier Portal as frequently as every five minutes. All ship-to names are updated no more than once per hour in the general working data set update from the ERP system.

Link: When this field is a link, clicking the link displays the Ship-to Address Detail view.

Item ID. The item number, name, or code from the customer ERP system or other data source.

Link: When this field is a link, clicking this link opens the Item Detail view.

Site. The code for the site where the item is delivered.

Link: Clicking this link opens the Site Address Detail view.

Receipt Qty. The quantity of the item received on this line.

Receipt Date. This is the effective date of the inventory transaction.

Shipper ID. The ID is the identifying number for the shipper record.

Shipper Number. This number is assigned to the sales order shipper by the supplier.

Receipt Detail

This information is from the transaction history.

Transaction Number. This number is unique and assigned by the ERP system.

Site. This is the site at which the inventory transaction was processed.

Location. This is the code for the physical location where inventory is stored that is associated with this transaction.

Lot/Serial. This inventory transaction is associated with this lot/serial number. Lot/serial numbers facilitate tracking of all transactions associated with a sales or purchase order.

Reference. This is the bin, roll, lot, or pallet number.

Receipt Qty. This is the quantity received against the purchase order line.

UM. This is the unit of measure for the inventory transaction quantity.

UM Conversion. The conversion factor to use if the UM for the line differs from the UM in the item master definition in the ERP system.

Record Date. This is the date the transaction was processed.

Invoices View

Note For information about Draft Invoices functionality, see “Draft Invoices” on page 84.

The Invoices view displays invoice status data. Using this view, customers and suppliers can expedite communications about invoices, vouchers, and checks. For each invoice, the view provides a complete set of information including due date, order number, item ID, voucher number and status, and other data. Customer administrators can control the number of days for which invoices and receipts data will be maintained by QAD Supplier Portal. Customers and suppliers can also control the visibility policy that determines whether invoices can be viewed.

Which Item-Sites Display in the View

There are three factors that determine which item-sites the view includes: the working data set, the user's account type, and the inventory management method.

- Working data set definition. In Admin » Data Management » Data Setup » Working Data Set-VMI or Admin » Data Management » Data Setup » Working Data Set-Kanban, Customer admin account users specify which item-site-supplier associations to display in the QAD Supplier Portal views.
- User's account type.
 - For standard customer account users, the view displays item-sites-suppliers from the VMI working data set or kanban working data set.
 - For standard supplier account users, the view displays the item-sites for a specific customer.
 - For consolidated account users, the view displays the data from the linked accounts.
- Item display type. The Item Display settings on the Policies subtab in Item Maintenance, Supplier Maintenance, and Customer Maintenance determine which inventory views display any given VMI item.

Updating the Data

For information on when QAD Supplier Portal updates the various fields in the view, see “Update History”.

User-Defined Fields

User-defined fields (UDFs) can be created for the Min/Max, Kanban Board, Orders, Schedules, ASN Headers, Receipts, and Invoice views. Use Admin » Company » Company Maintenance » User Labels subtab to define labels for the fields for each of these views.

Update Icon.  Click the update icon in the far-right column to open the User-Defined Fields screen for updating the values in the user-defined fields.

Note An export feature provides users with the ability to export UDFs from QAD Supplier Portal to the Poller client. The Policies tab in Company Maintenance contains a policy to control the export feature for UDFs. See “Policies”.

Refining the View

Use column sorting as well as the Filter and Display tabs or subtabs to refine the view. All users can refine the view displays.

Sort by Column. Click the column labels to sort the data rows.

Filter and Display Tabs/Subtabs. Go to the Filter tab or subtab to specify the search criteria for selecting which items to include in the current Data tab or subtab display. Go to the Display tab or subtab to specify which columns to include in the Data display.

Creating Reports

Go to the Print tab to specify report definitions. Reports are based on the data available as a result of the Filter and Display tab refinements.

Enabling Invoice Visibility

Customers and suppliers can control the visibility policy that determines whether invoices can be viewed.

Note that only an administrative user can set the invoice visibility policy.

To Set Company Invoice Visibility Policy

- 1 Go to Admin » Company » Company Maintenance.
- 2 Go to the Policies subtab.
- 3 Set the Invoice Visibility Policy field to Enable Invoice Visibility.
- 4 Set the Invoice History Days field to the number of days an invoice will be listed after the check for the invoice is printed.

- 5 Set the Receipts History Days field to the number of days prior to the current date receipts data will be listed.
- 6 Click Save.

To Set Supplier Invoice Visibility Policy

- 1 Go to Admin » Company » Supplier Maintenance.
- 2 Click on the name of a supplier.
- 3 Go to the Policies subtab.
- 4 Set the Invoice Visibility Policy field to Default or Enable Invoice Visibility. If Default, the policy for the supplier is effectively the same as that for the company. If the policy is enabled (Enable Invoice Visibility) or set to Default, and the policy for the company is enabled, then the invoice, voucher, and payment data will be extracted from the ERP system.
- 5 Click Save.

Columns/Fields

This table includes all columns/fields that are available for display in the Invoices view. Not all of the available columns/fields are included in the default display.

Applied Amt. This is the amount already received and applied to the invoice.

Buyer. This is the name of the buyer.

Check. This is the number of the check.

Confirmed. This indicates whether the invoice has been applied to the general ledger (GL) and is approved for payment.

Customer ID. This is the identifier of the customer.

Customer Name. This is the name of the customer.

Discount Amt. This is the discount amount allowed for the voucher.

Invoice. This is the invoice code.

Invoice Attachment. Click the Invoice Attachment icon  to a file attached to the invoice in a pop-up screen.

Note Invoice Attachment is an add-on feature of the Poller Client. The Poller can load the attached files of invoices which have a prefix of SCP_. Both customers and suppliers can view the attached files in QAD Supplier Portal.

Invoice Amt. This is the amount of the invoice.

Invoice Cur. This is the currency of the invoice.

Invoice Date. This is the date when the invoice was entered into the system.

Invoice Due Date. This is the payment due date for the invoice.

Invoice Qty. This is the quantity of the receiver line invoiced by the voucher.

Item ID. This is the identifier of the item or product ordered.

Note When this field is a link, clicking the link opens the Item Detail view.

Line. This is the line item number for the purchase order.

Note When this field is a link, clicking the link opens the Purchase Order Line Detail view.

Memo Item. The memo item's item ID (number, name, or code) from the customer ERP system or other data source. Note that for memo items, the Item field displays a combination of the item ID and item description, but the Memo Item field lists just the item ID. To filter memo items based on item ID, click the Filter tab and use the Memo Item field rather than the Item field. (However, to filter inventory items based on item ID, use the Item field.)

Note When this field is a link, clicking this link opens the Item Detail view.

Operation. The operation identifier.

Order Number. This is the purchase order number.

Note Clicking the order number link displays the Purchase Order Detail view.

Order Qty. This is the purchase order quantity for the item.

Payment Amt. This is the payment amount.

Payment Cur. This is the currency of the payment.

Payment Date. This is the date of the payment.

Payment Exchg Rate. This is the base currency exchange rate for the payment, expressed as a ratio to the transaction currency exchange rate in the Payment Exchg Rate2 field. The base currency is the currency in which your company does business.

Payment Exchg Rate2. This is the transaction currency exchange rate for the payment, expressed as a ratio to the base currency set in the Payment Exchg Rate field. The transaction currency is the currency in which a transaction is denominated.

Payment Number. This is the payment code.

Payment Reference. This is the payment reference information.

Payment Status. This is the payment status. The status includes Initial, Allocated, For Collection, Paid, Bounced, Open, Canceled, or Void. Initial means the payment is in your system, but does not generate any posting. Allocated means the payment is created and linked to open items. The transition to Allocated status generates postings and sub-ledger updates. For Collection means the payment is presented to the bank for immediate payment. Some examples of payments for collection include a check, a payment selection that is transferred directly to the bank, and paper transfers to the bank. Paid means the outgoing payment amount has been paid. Payments are either fully paid or not paid at all. A selection can be said to be partially paid if an individual payment is bounced. Bounced means a payment for which there were insufficient funds on your bank account. Open means that the check has been printed and is waiting to be sent out or has been sent out to the supplier. Canceled means that the check has been cashed by the supplier, has cleared the bank, and is no longer outstanding. Void means the check has been destroyed, torn up, or the word Void has been written across it.

PO Cur. This is the purchase order (PO) currency.

PO Discount Rate. This is the discount rate for the purchase order.

PO Exchg Rate. This is the base currency exchange rate for the purchase order, expressed as a ratio to the transaction currency exchange rate in the PO Exchg Rate2 field. The base currency is the currency in which your company does business.

PO Exchg Rate2. This is the transaction currency exchange rate for the payment, expressed as a ratio to the base currency set in the Payment Exchg Rate field. The transaction currency is the currency in which a transaction is denominated.

PO Line Invoice. Cost This is the purchase order line invoice cost.

Prepay Amt. This is the prepayment amount.

Receipt Date. This is the effective date of the inventory transaction.

Received Qty. This is the total received against the purchase order line.

Receiver. This is the number assigned to the receiving record (receiver), created by a receipt against a purchase order.

Site. This is the code for the site where the item is delivered.

Supplier. This is the name of the supplier.

Note When this field is a link, clicking the link opens the Supplier Address Detail view.

Supplier ID. This is the identifier of the supplier for the transaction.

Supplier Item ID. This is the supplier's identifier of an item.

Type. Identifies the purchase order line item type.

- **I** Inventory
- **S** Sub-contract
- **B** Blanket
- **M** Memo

UOM. This is the unit of measure of the item.

Voucher. This is a unique reference number that identifies the voucher.

Voucher Cur. This is the currency used in the voucher.

Voucher Exchg Rate. This is the base currency exchange rate for the voucher, expressed as a ratio to the transaction currency exchange rate in the Voucher Exchg Rate2 field. The base currency is the currency in which your company does business.

Voucher Exchg Rate2. This is the transaction currency exchange rate for the voucher, expressed as a ratio to the base currency set in the Voucher Exchg Rate field. The transaction currency is the currency in which a transaction is denominated.

Voucher Hold. This indicates whether the voucher is on hold.

Voucher Status. This is the voucher status.

Work Order ID. The work order identifier.

Draft Invoices

This section discusses Draft Invoices functionality, which is available from Invoices » Draft Invoices.

Important Policy settings in Admin » Company » Company Maintenance » Policies determine whether customer and supplier users can view draft invoices:

- Customers can only view and take approval actions on draft invoices if the Supplier Create Draft Invoice setting is Allowed at the customer level.
- Suppliers can only create/view/edit/submit draft invoices if the Supplier Create Draft Invoice setting is Allowed at the customer level and Default at the supplier level.

QAD Supplier Portal provides a process that enables suppliers to create and maintain draft invoice information in QAD Supplier Portal based on PO receipts records, including a reference to the identifying number of the actual invoice in the supplier's system. A workflow lets the customer review and then approve or reject the draft invoices. Once approved, the invoices can be exported to the customer's ERP system as supplier invoices using EDI tools.

Suppliers can create their own draft invoices easily, and customers can see matching lists of PO receipts that go with each draft invoice in a parent-child relationship—representing a considerable savings in the time ordinarily required to do the matching manually. Also, in QAD Supplier Portal Draft Invoices, the review/approve/reject process is always under the customer's control.

Additionally, in environments where government regulations set a maximum amount for individual supplier invoices, QAD Supplier Portal provides splitting functionality that divides large draft invoices into multiple smaller invoices, based on a supplier-defined maximum amount. See “Splitting Draft Invoices” on page 88.

This section includes the following major topics:

“Admin Setup Tasks” on page 84 describes control tasks performed by system administrators on the customer and supplier sides.

“Draft Invoice Workflow” on page 85 describes basic tasks for creating and approving draft invoices.

“Draft Invoices Views” on page 89 provides reference information about the fields that display on Draft Invoices screens.

Admin Setup Tasks

This section describes the administrative setup tasks required to use the Draft Invoices features.

To use Draft Invoices, admin users must complete the following control tasks.

Customer Admin Tasks

- Go to Admin » Company » Company Maintenance » Policies tab and set the following values:
 - Invoice Visibility Policy set as Enable Invoice Visibility
 - Supplier Create Draft Invoice Policy set as Allow Supplier Create Draft Invoice

This policy defines whether the Draft Invoices feature is available for the customer. It can be controlled at supplier level.

- Loading Tax Info Policy set to Allow Loading Tax Info

This policy defines whether the Poller gathers tax information (Taxable, Tax In, Tax Rate) into QAD Supplier Portal PO lines. This policy can only be controlled at customer level.

Note: Tax features are independent of Draft Invoices. Tax information can be loaded and displayed in Orders View and Receipts View even if Draft Invoices functionality is not is use.

Note There is no specific Policy setting related to draft invoice history. However, draft invoices are removed at the same time the associated receipts are removed, based on the setting of Receipts History Policy in Admin » Company » Company Maintenance » Policies tab.

- Go to Admin » Company » Supplier Maintenance and click on the selected Supplier ID of suppliers that should *not* have access to Draft Invoices functionality. Then, on the Policies tab, set Supplier Create Draft Invoice Policy as Not Allow Supplier Create Draft Invoice. For other suppliers, no action is required. Leave that policy set to Default. Those suppliers will have access to Draft Invoices functionality.
- Go to Admin » Company » Company Maintenance » Preferences tab and set following values:
 - Draft Invoice Batch ID Prefix
 - Draft Invoice Batch ID - Length of Serial No.

Together, these two fields control the composition and length of the system-generated Draft Invoice number. The total length of these fields should be equal to or less than 8.

Supplier Admin Task (optional)

Suppliers may have a maximum invoice amount limit specified by a government tax audit department; for example, this is a requirement in China.

When this is the case and the customer administrator has already set up the supplier as described above, the supplier administrator can go to Admin » Company » Company Maintenance » Draft Invoice tab. Then, use the Invoice Amount Limit field to define the government-specified amount. The system uses this amount to determine how to split invoices; see “Splitting Draft Invoices” on page 88.

Note The default value is 0, which means no limit is in effect, and QAD Supplier Portal draft invoice splitting functionality is not available.

Customer Server Admin Task

In the Poller server, `../svpoller/svpoller/poller.properties`, add the following section. This represents the location where SNF files containing approved final draft invoices are placed for import as supplier invoices.

```
EDI_DI_FILE=../../svpoller/svpoller/di_edi_export/asnexpedi.snf
```

Draft Invoice Workflow

Creating Draft Invoices

Supplier users can create draft invoices using Receipts View.

In Receipts View, there is check box at the left of each receipt record. Select the receipt records for which you want to create draft invoices, and click Create Draft Invoice.

QAD Supplier Portal displays the Draft Invoice Creation screen.

Note At this time, the default value of the Status field is Planned. See “Status Codes” on page 87.

Maintaining Draft Invoice Information

Supplier users can modify the Invoice Price and Invoice Quantity in the PO Matching list. QAD Supplier Portal updates the related Amount field.

Additionally, depending on government limits on the invoice amount, you can split the draft invoice into a group of smaller invoices. For information on this feature, see “Splitting Draft Invoices” on page 88.

After updating the draft invoice as required, supplier users can use their own invoice/tax system to create the “real” version of the invoice, which provides a printable invoice with a unique, controlled invoice number.

They can then update the Invoice Number field in the draft invoice record to correspond with the “real” invoice number.

Customers and supplier users can now view the draft invoice in the Draft Invoices main view, and drill down to the detail screens. See “Draft Invoices Views” on page 89.

Submitting Draft Invoices for Approval

Supplier users can next submit their draft invoices for customer approval.

Note Only invoices in Planned or Rejected status can be submitted. This includes new invoices submitted for the first time, or previously submitted invoices that have been rejected by the customer, updated by the supplier, and resubmitted for approval.

After submission, the Status field changes to Submitted. The draft invoice record is locked for supplier users; the supplier cannot update a submitted draft invoice.

Supplier users can also cancel a draft invoice that is in Planned or Rejected status.

Reviewing and Approving Draft Invoices

After draft invoices have been submitted by the supplier, customers can review them, and then approve or reject them. The basic approval is called *AP Approve*. If the supplier has changed the PO receipt price on the draft invoice, an additional customer approval is required, called *Fin Approve*.

To start the review/approval process, access the main Draft Invoices view at Invoices > Draft Invoices.

- 1 Click a Batch ID link to view the invoices in the batch.
- 2 Click an Invoice Line Number link to review the information on the draft invoice detail screen.
- 3 Change the Status field based on the action you want to take.

- *Approve* the invoice in one of two ways:
 - **AP Approve.** An Accounts Payable approver records approval. If the Invoice Price is the same as on the original PO receipt, the system sets the status to Fin Approved—meaning that the final Financial approval has taken place. However, if the price is different, the system sets the status to AP Approved. Another approver (usually on a higher organizational level) must perform the Fin-Approval step.
 - **Fin Approve.** A Financials approver records approval. In this case, the system sets the status to Fin Approved, and final approval has taken place.
- *Reject* the invoice if the status is Submitted or AP Approved. The supplier can then access the record, make required changes, and resubmit for approval.
- *Cancel* the invoice.

4 Click Save.

Completing the Draft Invoice Cycle

Each time that the Poller gen load process runs, QAD Supplier Portal looks for draft invoices with Status set to Fin Approved. It creates an SNF file that follows the EDI standard, and puts it into the Poller server, at the location identified in “Customer Server Admin Task” on page 85.

The customer then retrieves the SNF and loads the records into the ERP system as supplier invoices. This process can be executed using QAD’s EDI eCommerce product, or other customized EDI tools.

Finally, the Poller gathers the supplier invoices and loads them into QAD Supplier Portal. The system then changes the status of the associated draft invoices to Closed.

Status Codes

Status	Description	Event that Drives to this Status	Available Operations When in this Status	
			Customer	Supplier
Planned	Initial status	Supplier creates draft invoice	None	Submit/Cancel/Modify;
Submitted	Supplier delivers to customer to review	Supplier submits	AP Approve/Reject/Cancel	None
AP Approved	Customer AP accountant user approves	Customer AP approves	Fin Approve/ Reject/ Cancel	None
FIN Approved	Financial accountant user at customer approves If the Invoice Price is equal to the PO Price, the AP Approve action causes the status to change to Fin Approved. Otherwise, the status change is created by the Fin Approve action.	Customer Fin approves	Cancel	None

Status	Description	Event that Drives to this Status	Available Operations When in this Status	
			Customer	Supplier
Rejected	Rejected by customer AP or Financial accountant	Customer AP or Financial accountant rejects	None	Edit/Submit/Cancel
Closed	“Real” invoice has been loaded into QAD Supplier Portal	QAD Supplier Portal synchronizes the draft invoice as Closed when the supplier invoice is loaded	None	None
Canceled	Cancel	Customer or supplier cancels it	None	None

Splitting Draft Invoices

Because of government regulations that put a monetary limit on the value of individual invoices, suppliers in some countries sometimes need to divide high-value orders across multiple invoices. For example, this is the case with suppliers in China. The government audits each supplier every year and certifies the invoice amount limit for the next year.

QAD Supplier Portal’s Draft Invoice functionality supports this requirement by enabling suppliers to specify a maximum value (as defined by the government) that a single invoice can include. The system can then split the large invoice into multiple smaller invoices that do not exceed the limit.

When a supplier creates a draft invoice, they first collect all receipts lines that are payable by the customer. If the total amount is more than the Invoice Amount Limit specified for the supplier in Admin » Company » Company Maintenance » Policies » Draft Invoice tab, the supplier can split it into several draft invoices—that is, a batch of draft invoices. The amount of each invoice is equal to or less than the Invoice Amount Limit. Additionally, QAD Supplier Portal splits the PO Receipts matching list displayed in the Draft Invoice tab.

When the supplier clicks Split with an invoice selected in Draft Invoice, QAD Supplier Portal uses the following rules to split the draft invoice:

- When the supplier creates a draft invoice, the system applies one batch number only, with one draft invoice with line number 1.
- The supplier can split a draft invoice only when the invoice status is Planned or Rejected.
- If the original draft invoice amount $\leq$ Invoice Amount Limit, the system cannot split the invoice.
- After the split, all draft invoices have the same batch ID.
- After the split, each new draft invoice has an amount $\leq$ Invoice Amount Limit.
- After the split, each new draft invoice has the DI line number assigned automatically.
- After the split, the sum of the amounts of all DIs = original DI Amount = DI Batch’s Total Amount.
- After the split, the sum of the PO receipts line (with Quantity) of all DIs = Original DI’s PO Receipts Lines = DI Batch’s PO Receipts Lines.
- The quantity of each PO receipts lines in the new split DI is not split as a decimal, unless it is the last DI for this PO receipts line.

Draft Invoices Alerts

Draft Invoices components provide alerts based on each status change, using the standard QAD Supplier Portal Alerts mechanism. See “Alerts and Notifications” on page 140.

Available alerts include:

Event	Purpose of Notification
Draft Invoice Created	Informs the supplier and/or their customer that the draft invoice has been created as status Planned.
Draft Invoice Submitted	Informs the supplier and/or their customer that the draft invoice has been submitted, including the case where the supplier creates it with status of Submitted.
Draft Invoice Canceled	Informs the supplier and/or their customer that the draft invoice has been canceled. It includes both customer's and supplier's Cancel operations.
Draft Invoice AP Approve	Informs the supplier and/or their customer that the draft invoice has been AP-Approved by the customer. It excludes the case where the status been changed to Fin Approved.
Draft Invoice FIN Approved	Informs the supplier and/or their customer that the draft invoice has been Fin-Approved by the customer. It includes the case where the customer AP-Approves it, and the status is changed to Fin Approved directly.
Draft Invoice Rejected	Informs the supplier and/or their customer that the draft invoice has been rejected by the customer.
Draft Invoice Closed	Informs the supplier and/or their customer that the draft invoice has been changed to status Closed, which means that the supplier invoice associated with the draft invoice has been loaded into QAD Supplier Portal.

Draft Invoices Views

The main view is similar to other QAD Supplier Portal view screens, presenting top-level summary information about draft invoice records. You cannot edit fields in this view.

Fig. 3.1
Draft Invoices Main View

Batch ID	Supplier	Create Date	Line	Invoice Number	Invoice Date	Status	Export Status	Total Invoice Amt	Total Tax Amt	Total Gross Amt	Taxable Tax In	Tax Rate %	Invoice Reference
A0000004	Yo Yo's Are Us	2013-11-06 10:41:54	1	INV0000881	2013-11-06	FIN Approved	Not Exported	996.00	0.00	996.00	No	No	0.00
A0000004	Yo Yo's Are Us	2013-11-06 10:41:54	2		2013-11-06	Planned	Not Exported	888.00	0.00	888.00	No	No	0.00
A0000003	Yo Yo's Are Us	2013-11-05 10:44:41	1		2013-11-05	Planned	Not Exported	990.00	96.52	1086.52	Yes	No	9.75
A0000003	Yo Yo's Are Us	2013-11-05 10:44:41	2		2013-11-05	Planned	Not Exported	744.00	72.54	816.54	Yes	No	9.75
A0000002	Yo Yo's Are Us	2013-11-04 08:28:23	1	INV987876876765001	2013-11-04	Submitted	Not Exported	1000.00	0.00	1000.00	No	No	0.00
A0000002	Yo Yo's Are Us	2013-11-04 08:28:23	2	INV002ju9876567	2013-11-04	Planned	Not Exported	1000.00	0.00	1000.00	No	No	0.00
A0000002	Yo Yo's Are Us	2013-11-04 08:28:23	3		2013-11-04	Planned	Not Exported	1000.00	0.00	1000.00	No	No	0.00
A0000002	Yo Yo's Are Us	2013-11-04 08:28:23	4	INV4567451221234567	2013-11-04	Submitted	Not Exported	1000.00	0.00	1000.00	No	No	0.00
A0000002	Yo Yo's Are Us	2013-11-04 08:28:23	5	INV67876546789	2013-11-04	Submitted	Not Exported	412.80	0.00	412.80	No	No	0.00
A0000001	Yo Yo's Are Us	2013-10-30 08:56:33	1	INVHo00001T	2013-10-29	FIN Approved	Not Exported	700.00	0.00	700.00	No	No	0.00

The Draft Invoice in QAD Supplier Portal had been defined as three levels: batch, line, and matching list, with parent-child relationships. The draft invoice line represents one piece of the “real” invoice in the supplier’s system.

Suppliers may create a group of invoices at the same time—a batch. Or, if government regulations limit the amount of a single invoice, they may split a large draft invoice into smaller invoices, all created in the same batch.

From the main view, click a link in the Batch ID column to show information about the batch, as well as its child records (individual draft invoices), presented in three tabs—Batch Invoice, Draft Invoice, and Item List. If you click a link in the Line or Invoice column, the system goes directly to the Draft Invoice tab.

Main View Fields

Note Tax-related fields and Total Gross Amount display only when Supplier Create Draft Invoice Policy is set to Allow Supplier Create Draft Invoice in Admin » Company » Company Maintenance » Policies. This policy is controlled only at the customer level; it cannot be set for individual suppliers.

Batch ID. System-assigned identifier for the batch.

Create Date. Creation date of the whole batch, as well as all invoices in the batch.

Line. Line number of the batch, assigned automatically when the supplier creates the draft invoice, or splits a large invoice to create a series of smaller invoices.

Invoice Number. The “real” invoice’s number in the supplier’s system.

Invoice Date. Date of the draft invoice.

Status. Status of the draft invoice. See “Status Codes” on page 87.

Export Status. Indicates whether the draft invoice has been exported as a supplier invoice.

Total Invoice Amt. Amount of the draft invoice.

Total Tax Amt. Total tax amount of the draft invoice.

Total Gross Amt. Total gross amount of draft invoice; Invoice Amt + Total Tax Amount.

Currency Code. The currency code associated with the draft invoice.

Taxable, Tax In, Tax Rate %. Tax information of the draft invoice.

Invoice Reference. Reference information about the draft invoice.

Batch Amt. Total amount of the draft invoice batch.

Invoice Amount Limit. The maximum amount limit for a single supplier invoice, as defined in Admin » Company » Company Maintenance » Draft Invoice tab. See “Supplier Admin Task (optional)” on page 85.

Defined and Named Alerts.  or  The bell icon in a data line indicates that the data line is monitored as a target data line in at least one user-defined alert. Exceptions: alerts such as New VMI working data set selection and Average demand out of tolerance that are aimed at the customer organization rather than a single data line do not display the icon since it would apply to all data lines.

Alerts Notifications.  or  The envelope icon in a data line indicates that alert notifications have been sent regarding that target data line.

Batch Invoice Tab

The Batch Invoice tab includes both header and line information; the line represents an individual draft invoice.

Fig. 3.2
Batch Invoice Tab

Messages

Inventory

Orders

Schedules

ASNs

TMS

Receipts

Invoices

SQP

RFQ

Admin

Help

Customer: QAD R&D

Batch Invoice

Draft Invoice

Item Price List

Batch Invoice Detail

Batch ID: A0000002

Create Date: 2013-11-05 00:28 Asia/Shanghai

Currency Code: usd

Total Invoices Amt: 4412.80

Total Tax Amt: 0.00

Total Gross Amt: 4412.80

Line	Invoice Number	Invoice Date	Status	Export Status	Total Invoice Amt	Total Tax Amt	Total Gross Amt	Taxable	Tax In	Tax Rate %	Invoice Reference
1	INV987876876765001	2013-11-05	Submitted	Not Exported	1000.00	0.00	1000.00	No	No	0.00	
2	INV002ju9876567	2013-11-05	Planned	Not Exported	1000.00	0.00	1000.00	No	No	0.00	
3		2013-11-05	Planned	Not Exported	1000.00	0.00	1000.00	No	No	0.00	
4	INV4567451221234567	2013-11-05	Submitted	Not Exported	1000.00	0.00	1000.00	No	No	0.00	
5	Inv67876546789	2013-11-05	Submitted	Not Exported	412.80	0.00	412.80	No	No	0.00	

Batch Invoice Tab Header Fields

Note All fields in this view are read-only.

Note Total Tax Amount and Total Gross Amount display only when Supplier Create Draft Invoice Policy is set to Allow Supplier Create Draft Invoice in Admin » Company » Company Maintenance » Policies. This policy is controlled only at the customer level; it cannot be set for individual suppliers.

Batch ID. System-assigned identifier for the batch.

Create Date. Creation date of the whole batch, as well as all invoices in the batch.

Currency Code. The currency code of the draft invoice in the batch.

Total Invoices Amt. Total invoice amount of the whole batch.

Total Tax Amt. Total tax amount of the whole batch.

Total Gross Amt. Total gross amount of the whole batch; Total Invoice Amount + Total Tax Amount.

Batch Invoice Tab Line Fields

Note All fields in this view are read-only.

Note Tax-related fields and Total Gross Amount display only when Supplier Create Draft Invoice Policy is set to Allow Supplier Create Draft Invoice in Admin » Company » Company Maintenance » Policies. This policy is controlled only at the customer level; it cannot be set for individual suppliers.

Line. Line of the draft invoice in the batch. When you click the line number, QAD Supplier Portal switches to the Draft Invoice tab to show the detail of the draft invoice.

Invoice Number. Draft invoice number of the draft invoice in the batch.

Invoice Date. Date of the draft invoice in the batch.

Status. Status of the draft invoice. See “Status Codes” on page 87.

Export Status. Indicates whether the draft invoice has been exported. Only available when draft invoice has been Fin Approved.

Total Invoice Amt. Draft invoice amount of the draft invoice in the batch.

Total Tax Amt. Total tax amount of the draft invoice.

Total Gross Amt. Total gross amount of the draft invoice; Total Invoice Amt + Total Tax Amt.

Taxable, Tax In, Tax Rate %. Tax information of the draft invoice.

Invoice Reference. Reference information about the draft invoice in the batch.

Draft Invoice Tab

The Draft Invoice tab shows the data at both batch and draft invoices levels.

This is the only tab in Draft Invoices screen that lets you update some values. Whether you can edit fields depends on the status of the draft invoice.

The line-level display at the bottom shows a matching list of PO receipts for the draft invoice.

For draft invoices that are larger than the government-specified maximum, click Split to create multiple draft invoices based on the value of Invoice Amount Limit. See “Splitting Draft Invoices” on page 88.

Fig. 3.3
Draft Invoice Tab

Customer: QAD R&D

Messages Inventory Orders Schedules ASNs TMS Receipts Invoices SQP RFQ Admin Help

Batch Invoice
Draft Invoice
Item Price List

Draft Invoice Detail

Batch ID:	3000039	Status:	Planned
Create Date:	2013-10-28 19:24 Asia/Shanghai	Export Status:	Not Exported
Line:	1	Consistent Price for the DI:	☒
Invoice Number:	INV0001TEST	Invoice Amount Limit:	10.0
Invoice Date:	2013-10-28	Total Invoice Amt:	10.00
Invoice Reference:	asdsac	Total Tax Amt:	0.00
Currency Code:	usd	Total Gross Amt:	10.00
		Taxable:	No
		Tax In:	No
		Tax Rate %:	0.00

Order	Order Line	Site	Receiver	Item	Received Qty	Open Qty	Invoice Quantity	Net Unit Cost	Invoice Price	Amt	Tax Amt	Gross Amt

Save Split

Draft Invoice Tab Header Fields

Note Tax-related fields and Total Gross Amount display only when Supplier Create Draft Invoice Policy is set to Allow Supplier Create Draft Invoice in Admin » Company » Company Maintenance » Policies. This policy is controlled only at the customer level; it cannot be set for individual suppliers.

Batch ID. System-assigned identifier for the batch.

Create Date. Creation date of the whole batch, as well as all invoices in the batch.

Line. Line number of the batch, assigned automatically when the supplier creates the draft invoice, or splits a large invoice to create a series of smaller invoices.

Invoice Number. The “real” invoice’s number in the supplier’s system. The supplier creates the draft invoice in QAD Supplier Portal first, then creates the real invoice using their own system. After that, the supplier prints a physical invoice with a unique invoice number. Then they enter this number in this field.

Note This field can be edited by the supplier only when Status is Planned or Rejected.

Draft Invoice Date. Date of the draft invoice.

Invoice Reference. Reference information about the draft invoice.

Currency Code. The currency code associated with the draft invoice.

Status. Status of the draft invoice. See “Status Codes” on page 87.

Export Status. Indicates whether the draft invoice has been exported. Only available after draft invoice is Fin Approved.

Consistent Price for the DI. Specify the effect of price changes to POs in the matching list.

Yes: If the supplier modifies the price in the matching list, then all PO matching lines with the same item are updated with the new price.

No: If the supplier modifies the price, it does not affect other PO matching lines.

The supplier can update this field when Status is Planned or Rejected.

Invoice Amount Limit. The maximum amount limit for a single supplier invoice, as defined in Admin » Company » Company Maintenance » Draft Invoice tab. See “Supplier Admin Task (optional)” on page 85.

Total Invoice Amt. Sum of all amounts of the matched PO receipts in this draft invoice. The system updates this field if the supplier modifies the price or quantity of a line.

Total Tax Amt. Sum of all tax amounts of the matched PO receipts in this draft invoice. The system updates this field if the supplier modifies the price or quantity of a line.

Total Gross Amt. Sum of all gross amounts of the matched PO receipts in this draft invoice. The system updates this field if the supplier modifies the price or quantity of a line.

Taxable, Tax In, Tax Rate %. Tax information of the draft invoice.

All POs on the match list of the draft invoice MUST have consistent tax information.

Draft Invoice Tab Line Fields

Note Tax Amount and Total Gross Amount display only when Supplier Create Draft Invoice Policy is set to Allow Supplier Create Draft Invoice in Admin » Company » Company Maintenance » Policies. This policy is controlled only at the customer level; it cannot be set for individual suppliers.

Order. The purchase order number of the PO line of the receipts.

Order Line. The purchase order line number of the PO line of the receipts.

Site. The site of the PO line of the receipts.

Receiver. The receiver number of the PO receipts line.

Item. The item number of the PO line of the receipts.

Received Qty. The received quantity of the PO receipts line.

Open Qty. The open quantity of the PO receipts line.

Invoice Quantity. Quantity of the draft invoice. The default value is the Open Qty in the receipts line; the supplier can modify it when Status is Planned or Rejected.

It should be between 0 and Open Qty.

Net Unit Cost. Price of the PO line, from the linked PO Receipts of the draft invoice. This is the default value for the invoice price. If the supplier has changed the price, this field has red shading to help identify it for the customer's review.

Invoice Price. Price of the item in the draft invoice. The original default value is the Net Unit Cost in the PO line; the supplier can modify it when Status is Planned or Rejected. If the supplier has changed the price, this field has red shading to help identify it for the customer's review.

Amt. The value of the line, exclusive of any taxes; Invoice Quantity * Invoice Price. If quantity or price is modified, the system updates Amount.

Tax Amt. Tax information of the PO line. The system updates this field if the supplier modifies the price or quantity.

Gross Amt. Gross amount of this draft invoice. The system updates this field if the supplier modifies the price or quantity.

Item List Tab

Fig. 3.4
Item Price List Tab

Messages Inventory Orders Schedules ASNs TMS Receipts Invoices SQP RFQ Admin Help										
Supplier: Yo Yo's Are Us										
Batch Invoice Draft Invoice Item Price List	Draft Invoice Detail									
	Batch ID:		A0000004				Status:		Planned	
	Create Date:		2013-11-07 00:41 Asia/Shanghai				Export Status:		Not Exported	
	Line:		2				Invoice Amount Limit:		10.0	
	Invoice Number:						Total Invoice Amt:		888.00	
	Invoice Date:		2013-11-07				Total Tax Amt:		0.00	
	Invoice Reference:						Total Gross Amt:		888.00	
	Currency Code:		usd				Taxable:		No	
							Tax In:		No	
							Tax Rate %:		0.00	
Site	Item	UM	Net Unit Cost	Invoice Price	Invoice Quantity	Amt	Tax Amt	Gross Amt		
10000	brz-k1	EA	1.00	12.00	72.0	864.00	0.00	864.00		

Item Price List Header Fields

This tab shows the same data as the Draft Invoice tab, but shows it by Item Price grouped detail instead of each PO receipts line.

Note All fields in this view are read-only.

Note Tax-related fields and Total Gross Amount display only when Supplier Create Draft Invoice Policy is set to Allow Supplier Create Draft Invoice in Admin » Company » Company Maintenance » Policies. This policy is controlled only at the customer level; it cannot be set for individual suppliers.

Batch ID. System-assigned identifier for the batch.

Create Date. Creation date of the whole batch, as well as all invoices in the batch.

Line. Line number of the batch, assigned automatically when the supplier creates the draft invoice, or splits a large invoice to create a series of smaller invoices.

Invoice Number. The “real” invoice’s number in the supplier’s system. The supplier creates the draft invoice in QAD Supplier Portal first, then creates the real invoice using their own system. After that, the supplier prints a physical invoice with a unique invoice number. Then they enter this number in the Draft Invoice tab.

Invoice Date. Date of the draft invoice.

Invoice Reference. Reference information about the draft invoice.

Currency Code. Currency code associated with the draft invoice.

Status. Status of the draft invoice. See “Status Codes” on page 87.

Export Status. Indicates whether the draft invoice has been exported. Only available after draft invoice is Fin Approved.

Invoice Amount Limit. The maximum amount limit for a single supplier invoice, as defined in Admin » Company » Company Maintenance » Draft Invoice tab. See “Supplier Admin Task (optional)” on page 85.

Total Invoice Amt. Sum of all amounts of the matched PO receipts in this draft invoice.

Total Tax Amt. Sum of all tax amounts of the matched PO receipts in this draft invoice.

Total Gross Amt. Sum of all gross amounts of the matched PO receipts in this draft invoice; Total Invoice Amount + Total Tax Amount.

Taxable, Tax In, Tax Rate %. Tax information of the draft invoice.

Item List Line Fields

Note All fields in this view are read-only.

Note Tax Amount and Gross Amount display only when Supplier Create Draft Invoice Policy is set to Allow Supplier Create Draft Invoice in Admin » Company » Company Maintenance » Policies. This policy is controlled only at the customer level; it cannot be set for individual suppliers.

Site. The site associated with the item on the PO.

Item. The part number of the item on the PO.

UM. The unit of measure for the item on the PO.

Net Unit Cost. The PO price of the item per UM. This is the default value for the invoice price. If the supplier has changed the price, this field has red shading to help identify it for the customer’s review.

Invoice Price. Price of item in the draft invoice. The original default value is the Net Unit Cost in the PO line. If the supplier has changed the price, this field has red shading to help identify it for the customer’s review.

Invoice Quantity. Quantity of the item in the draft invoice.

Amt. The value of the item, exclusive of any taxes; Invoice Quantity * Invoice Price.

Tax Amt. Tax information for the item.

Gross Amt. Total amount for this item; Amount + Tax Amount.

Supplier Quality Performance View

Use the Supplier Quality Performance (SQP) function to monitor and compare the performance of suppliers against key metrics for a specified period.

See “Supplier Quality Performance Metrics” for detailed information about each metric and its parameters.

Note Supplier performance data for the current period is updated weekly, so data for the current period is complete only through the current week. At the end of a period, temporary supplier performance data is available one day of the end of the period. Final supplier performance data for an entire period is available eight days after the end of a period.

The following sections describe how to set up and use Supplier Quality Performance:

- Creating an SQP Metrics Template
- Enabling SQP Monitoring
- Applying an SQP Metrics Template
- Viewing SQP Reports
- Printing SQP Reports
- Enabling SQP Supplier Alerts

Note SQP reporting is only done for suppliers who (a) have SQP enabled for them and (b) have a SQP metric template associated with them. Suppliers that do not meet both these requirements will not be represented in the SQP Reports.

Creating an SQP Metrics Template

A SQP metrics template is a group of performance metrics with relative scoring weights that is applied to supplier(s) and used to measure their performance.

See “Supplier Quality Performance Metrics” for detailed information about each metric and its parameters.

To create a SQP metrics template:

- 1 Open the Admin » Company » Supplier Quality Performance » Template Setup page. A list of available templates is displayed.
Note you can edit an existing template in this list by clicking on the template ID link.
- 2 Click New Template to open the template editor.
- 3 Enter a name for the template in the Template ID text box.
- 4 Optional: Click the Set As Default Template check box to make this the template that is automatically applied to a supplier for which SQP monitoring is enabled.

- 5 Enter a description of the template in the Description text box.
 - 6 Select one or more SQP metrics to use in this template by clicking the check box next to the metric's name. This displays editable parameters for the metric. See “Supplier Quality Performance Metrics” for detailed information about each metric and its parameters.
 - 7 Define the parameter(s) for the selected metric(s), including the Pass and Superiority scores. The Pass score is the acceptable score for this metric; the Superiority score is the mark that indicates excellent performance against this metric.
 - 8 Assign a relative scoring weight for each metric as a percentage. The weight of a SQP metric indicates its importance relative to other metrics used in this template. For example, a metric with a weight of 50% contributes twice the total points to a supplier's SQP score as a metric weighted at 25%. The weighting of all metrics must total 100%. QAD Supplier Portal will keep a running total of the weights assigned to each metric in the template and alert you if they do not total 100% when you try to save the template.
 - 9 Click Save to save the new template.
- Note** Only those metrics that are in use on a template are displayed in the SQP Reports view; if a metric is not in use, it generates no data to display.

Enabling SQP Monitoring

SQP monitoring can be enabled from either the:

- Company page
- Supplier page.

To enable SQP monitoring:

- 1 Select Allow Supplier Quality Performance or Do Not Allow Supplier Quality Performance from the Supplier Quality Performance Policy menu.
On the Supplier page, there is the additional menu option Default. Select Default to have the supplier to inherit the SQP policy defined for the company on the Company page.
- 2 Select the beginning month of the year period on the SQP Metric Start Month of Year menu. Typically, this is the beginning of the fiscal year, although any month can be selected.
- 3 Select the period (month, quarter, etc.) covered by SQP report on the SQP Metric Period menu.
- 4 Click OK to save the policy and enable SQP monitoring.

Note Only when SQP monitoring is enabled is raw SQP data tracked and stored for a supplier. The data is updated and stored daily. SQP only calculates the data from the day the SQP policy was set up. The SQP report is available one day after the end date of the period defined in the SQP Metric Period policy.

Applying an SQP Template

Each supplier that has SQP monitoring enabled should have a SQP metric template associated with it. The default template is automatically associated with any supplier for which monitoring has been enabled. You can change the template or modify some parameters on it at the per supplier level on the SQP Supplier Setup page.

See “Supplier Quality Performance Metrics” for detailed information about each metric and its parameters.

To apply a template to a supplier:

- 1 Open the Admin » Company » Supplier Quality Performance » Supplier Setup page. A list of suppliers for which SQP monitoring has been enabled displays. You may use the column headings, Filter tab, or Display tab to change how the list displays. See the User Interface Overview for details.
- 2 Open the Template ID drop-down menu next to the Supplier ID and select the template to apply to this supplier. Or, select one or more suppliers by clicking the check box next to their Supplier IDs, opening the Change Template for Selected Supplier(s) drop-down menu and selecting the template to apply.
- 3 Enter Pass and Superiority values for each supplier.
- 4 Click Save to apply the template to the supplier(s) or Reset to remove unsaved changes.

Viewing SQP Reports

Note SQP reporting is only done for suppliers who (a) have SQP enabled for them and (b) have a SQP metric template associated with them. Suppliers that do not meet both these requirements will not be represented in the SQP Reports.

There are three views of SQP reports:

- By Supplier - accessed by opening SQP » Report by Supplier
- By Metric - accessed by opening SQP » Report by Metric.
- By Region and Industry - accessed by opening SQP » Report by Region & Industry.

The By Supplier and By Metric Supplier Quality Performance views each have three tabs:

- Dashboard - which displays SQP data in a graphical format. The Dashboard tab is the primary access point to SQP reports.
- Table - which displays SQP data in a tabular format
- Print - which prints the SQP in a selected format. See “Printing SQP Reports” for details.

See “Supplier Quality Performance Metrics” for detailed information about each metric in the report and its parameters.

Note Schedule ABS Value Difference, Schedule SKU/Line Item Compliance, and Schedule Ship Date Performance metrics are available on an aggregated report.

Consolidated customer accounts can view these reports for the suppliers of all consolidated customer member accounts. Consolidated supplier accounts can view these reports for the suppliers of all consolidated supplier member accounts.

The Dashboard and Table tabs function differently in Report By Supplier Mode and Report By Metric mode, as described in the following sections.

The By Region and Industry View has a different user interface described in “Report by Region and Industry View”.

Dashboard Tab (Report By Supplier Mode)

In Report By Supplier Mode, the Dashboard tab displays SQP data in graphical format arranged by suppliers. It has the following parts:

Period. Choose the period for which SQP data is to be displayed from this drop-down menu. Data for the current period is updated weekly. The period and supplier selected here is also the period used to display data on the Table tab. The period may be one of the following:

- **YYYYMNN** - where “YYYY” is the year, and “NN” is the month in that year. For example, 2010M10 or 2012M2. The month is determined by the company fiscal year set on the “Company Maintenance” page. For example, if the company fiscal year begins in July, selecting 2011M1 displays data for July 2011, the first month of the fiscal year.
- **YYYYQN** - where “YYYY” is the year, and “N” is the quarter in that year. For example, 2010Q2 or 2012Q4. The quarter is determined by the company fiscal year set on the “Company Maintenance” page. For example, if the company fiscal year begins in July, selecting 2011Q1 displays data for July, August, and September 2011, the first three months of the fiscal year.
- **YYYYHYN** - where “YYYY” is the year, and “N” is the half in that year. For example, 2010HY2 or 2012HY1. The half year is determined by the company fiscal year set on the “Company Maintenance” page. For example, if the company fiscal year begins in July, selecting 2011HY1 displays data for July, August, September, October, November, and December 2011, the first six months of the fiscal year.
- **YYYYY** - where “YYYY” is the year. For example, 2010Y or 2011Y. The year is determined by the company fiscal year set on the “Company Maintenance” page. For example, if the company fiscal year begins in July, selecting 2011Y displays data for July, August, September, October, November, and December 2010 and January, February, March, April, May, and June 2011, the twelve months of the fiscal year.

SQP Metric Final Score Chart. This chart (on the left side of the view) displays the supplier's final score. An icon indicates if the supplier's mark is Excellent (Green), Pass (Yellow), or Fail (Red). The score bar shows the score definition for the supplier and its final score position in relation to other suppliers. This chart is visible to customers and suppliers. The supplier can only see its own score chart.

See “Supplier Quality Performance Metrics” for detailed information about each metric in the report and its parameters.

History button. Click to display a bar chart of historical SQP metric scores for this supplier. Historical data for a period is available eight days after the close of a period.

Detail button. Click to display the detailed SQP metric score information for this supplier. This detail information includes specific items that contributed to the score. **Note:** If there is no detail for a supplier, a message box indicating this appears when you select the Detail button

SQP Metric Score Chart. This chart (on the right side of the view) displays the SQP metrics scores for a particular supplier. This chart is visible to customers and suppliers. The customer can determine which supplier's score is displayed by selecting the supplier on the SQP Metric Final Score Chart. The supplier can only see its own score chart. If there is no data for this chart, a message indicating there is no data available displays.

History button. Click to display a bar chart of historical SQP metric scores for this supplier. Historical data for a period is available eight days after the close of a period.

Detail button. Click to display the detailed SQP metric score information for this supplier. This detail information includes specific items (for example, ASNs) that contributed to the score.

Note: Some metrics do not have a detail report.

Table Tab (Report By Supplier Mode)

In Report By Supplier mode, the Table tab displays SQP data in tabular format arranged by suppliers. It has the following parts:

SQP Metric Average Score Table. This table (in the upper part of the view) displays the final score for all suppliers and indicates their marks: Excellent, Pass, or Fail. The table is sorted by final score in descending order. This table is visible to customers only.

SQP Metric Score Table. This table (on the lower part of the view) displays the SQP metrics scores for a particular supplier. Indented underneath each supplier record, the related metric performance records are displayed. This table is visible to customers and suppliers. The customer can determine which supplier's score is displayed by selecting the supplier on the SQP Metric Final Score Chart (on the Dashboard tab). The supplier can only see its own score table.

See “Supplier Quality Performance Metrics” for detailed information about each metric in the report and its parameters.

Dashboard Tab (Report By Metric Mode)

In Report by Metric mode, the Dashboard tab displays SQP data in graphical format arranged by SQP metrics. It has the following parts:

Period. Choose the period for which SQP data is to be displayed from this drop-down menu. Data for the current period is updated weekly. The period selected here is also the period used to display data on the Table tab. The period may be one of the following:

- **YYYYMNN** - where “YYYY” is the year, and “NN” is the month in that year. For example, 2010M10 or 2012M2. The month is determined by the company fiscal year set on the “Company Maintenance” page. For example, if the company fiscal year begins in July, selecting 2011M1 displays data for July 2011, the first month of the fiscal year.
- **YYYYQN** - where “YYYY” is the year, and “N” is the quarter in that year. For example, 2010Q2 or 2012Q4. The quarter is determined by the company fiscal year set on the “Company Maintenance” page. For example, if the company fiscal year begins in July, selecting 2011Q1 displays data for July, August, and September 2011, the first three months of the fiscal year.

- YYYYHYN - where “YYYY” is the year, and “N” is the half in that year. For example, 2010HY2 or 2012HY1. The half year is determined by the company fiscal year set on the “Company Maintenance” page. For example, if the company fiscal year begins in July, selecting 2011HY1 displays data for July, August, September, October, November, and December 2011, the first six months of the fiscal year.
- YYYYYY - where “YYYY” is the year. For example, 2010Y or 2011Y. The year is determined by the company fiscal year set on the “Company Maintenance” page. For example, if the company fiscal year begins in July, selecting 2011Y displays data for July, August, September, October, November, and December 2010 and January, February, March, April, May, and June 2011, the twelve months of the fiscal year.

SQP Metric Summary Score Chart. This chart (on the left side of the view) displays the average scores for individual SQP metrics and the number of suppliers measured against this metric. This chart is visible to customers and suppliers. The supplier can only see its own score chart.

See “Supplier Quality Performance Metrics” for detailed information about each metric in the report and its parameters.

History button. Click to display the average scores for this metric. Historical data for a period is available eight days after the close of a period.

Detail button. Click to display the detailed SQP metric score information for this metric. This detail information includes specific supplier records that contributed to the score. **Note:** Some metrics do not have a detail report.

See “Supplier Quality Performance Metrics” for detailed information about each metric in the report and its parameters.

SQP Metric Detail Chart. This chart (on the right side of the view) displays the scores for individual suppliers against the metric selected in the SQP Summary. It is visible to customers and suppliers, but the supplier can only see its own score. If there is no data for this chart, a message indicating there is no data available displays.

See “Supplier Quality Performance Metrics” for detailed information about each metric in the report and its parameters.

History button. Click to display a bar chart of historical SQP metric scores for this metric. Historical data for a period is available eight days after the close of a period.

Detail button. Click to display the detailed SQP metric score information for this metric. This detail information includes specific supplier records that contributed to the score. **Note:** If there is no detail for a metric, a message box indicating this appears when you select the Detail button.

See “Supplier Quality Performance Metrics” for detailed information about each metric in the report and its parameters.

Table Tab (Report By Metric Mode)

In Report By Metric mode, the Table tab displays SQP data in tabular format arranged by SQP Metrics. It has the following parts:

SQP Metric Score Table. This table displays the SQP metrics scores for a individual suppliers arranged by SQP metric. This table is visible to customers and suppliers, but the supplier can only see its own score(s). Indented underneath each metric the related supplier records are displayed.

See “Supplier Quality Performance Metrics” for detailed information about each metric in the report and its parameters.

Report by Region and Industry View

In Report By Industry and Region mode, SQP data is displayed in graphical and tabular format on a single view. It has the following parts:

Period. Choose the period for which SQP data is to be displayed from this drop-down menu. Data for the current period is updated weekly. The period may be one of the following:

- **YYYYMNN** - where “YYYY” is the year, and “NN” is the month in that year. For example, 2010M10 or 2012M2. The month is determined by the company fiscal year set on the “Company Maintenance” page. For example, if the company fiscal year begins in July, selecting 2011M1 displays data for July 2011, the first month of the fiscal year.
- **YYYYQN** - where “YYYY” is the year, and “N” is the quarter in that year. For example, 2010Q2 or 2012Q4. The quarter is determined by the company fiscal year set on the “Company Maintenance” page. For example, if the company fiscal year begins in July, selecting 2011Q1 displays data for July, August, and September 2011, the first three months of the fiscal year.
- **YYYYHYN** - where “YYYY” is the year, and “N” is the half in that year. For example, 2010HY2 or 2012HY1. The half year is determined by the company fiscal year set on the “Company Maintenance” page. For example, if the company fiscal year begins in July, selecting 2011HY1 displays data for July, August, September, October, November, and December 2011, the first six months of the fiscal year.
- **YYYYY** - where “YYYY” is the year. For example, 2010Y or 2011Y. The year is determined by the company fiscal year set on the “Company Maintenance” page. For example, if the company fiscal year begins in July, selecting 2011Y displays data for July, August, September, October, November, and December 2010 and January, February, March, April, May, and June 2011, the twelve months of the fiscal year.

Industry Checkboxes. These checkboxes enable you to select the industry or industries for which SQP data for the selected period is to be displayed. Available industries include Automotive, Consumer Products, Food and Beverage, High Technology, Life Sciences, and Other. A supplier’s industry is inherited from its customer. A customer’s industry is defined when the QAD Supplier Portal subscription for the account is created.

Refresh Report Button. Click this button to refresh the report data and view.

Overall Graphical Display. The top header shows SQP data for suppliers in selected industries and period in all regions in graphical format. Clicking the arrow icon reveals headers and graphical displays of SQP data for selected industries broken down by regions. Clicking the arrow icon again hides the regional breakdown data

Region Graphical Displays. TSQP data for regions is show under these headings. Available regions include Asia Pacific, EMEA, Latin America, North American, and Other. A supplier’s region is determined by the country code associated with it in “Supplier Maintenance”.

The graph on the left displays data from all suppliers in the selected industries and period for which there is SQP data. The graph on the right displays data from suppliers of the customer organization associated with the current login account in the selected industries and period for which there is SQP data. The graphs show Superior (Green), Pass (Yellow), and Fail (Red).

Region Tabular Displays. Clicking the arrow icon on the Region heading shows the data represented in the Region Graphical Display in tabular format. Clicking the arrow again hides the tabular data.

The table on the left displays data from all suppliers in the selected industries and period for which there is SQP data. The table on the right displays data from suppliers of the customer organization associated with the current login account in the selected industries and period for which there is SQP data.

Printing SQP Reports

Use the Print tab on the Supplier Quality Performance view to generate copies of SQP in PDF, CSV, XLS, RTF, XML, or HTML formats. See “Overview” for details about using the Print tab.

Note The Report by Region and Industry is not printable through the Print tab.

Enabling SQP Supplier Alerts

There are two alerts that can be enabled for suppliers with SQP monitoring enabled:

- Final Score Report Alert - which alerts the selected supplier(s) to their final SQP metrics score for the past period.
- Continued Failed Score Alert - which alerts the selected supplier(s) that a failed SQP metric score in the past period continues in the current period.

For details on enabling SQP supplier alerts, see “Alerts and Notifications”.

Supplier Quality Performance Metrics

The Supplier Quality Performance (SQP) function monitors and compares the performance of suppliers against key metrics, described in this topic.

DIFOT (Delivered in Full On Time)

This metric measures replenishment performance during the current period; how often the customer gets what they need when they need it. It has the following parameters:

Tolerance of Time	Enter the allowable number of days before and after the specified delivery date a shipment may arrive and still be considered “on time.”
Tolerance of Quantity	Enter the allowable percentages under and over the specified delivery quantity a shipment may contain and still be considered “in full.”
Pass Mark	Enter the percentage of times the metric is met for a supplier's performance considered to be acceptable.

Superiority Mark	Enter the percentage of times the metric is met for a supplier's performance considered to be excellent.
Evaluate Formula	Select the formula to be used from the menu: Based on Delivery Lines or Based on Demand Lines. Based on Delivery Lines is calculated by comparing the count of deliveries received DIFOT for the period against the total count of deliveries for the period. Based on Demand Lines is calculated by comparing the count of demands (PO lines with a due date and Schedule release details with a delivery date) that were received DIFOT in the period against the total demands for the period. See formulas below.

The formula used to calculate this metric is one of the following:

Based on Delivery Lines	$\% (\text{Delivery Lines DIFOT}) / (\text{Total Delivery Lines})$
Based on Demand Lines	$\% (\text{Demand PO Lines or Schedule Details DIFOT}) / (\text{Total Demand PO Lines or Schedule Details})$

DIFOT-POs

This metric measures replenishment performance during the current period against purchase orders. It has the following parameters:

Tolerance of Time	Enter the allowable number of days before and after the specified delivery date a shipment may arrive and still be considered "on time."
Tolerance of Quantity	Enter the allowable percentages under and over the specified delivery quantity a shipment may contain and still be consider "in full."
Pass Mark	Enter the percentage of times the metric is met for a supplier's performance considered to be acceptable.
Superiority Mark	Enter the percentage of times the metric is met for a supplier's performance considered to be excellent.
Evaluate Formula	Select the formula to be used from the menu: Based on Delivery Lines or Based on Demand Lines. Based on Delivery Lines is calculated by comparing the count of deliveries received DIFOT against POs for the period against the total count of deliveries against POs for the period. Based on Demand Lines is calculated by comparing the count of demands (PO lines with a due date) that were received DIFOT in the period against the total PO demands for the period. See formulas below.

The formula used to calculate this metric is one of the following:

Based on Delivery Lines	$\% \text{ (PO Delivery Lines DIFOT) / (Total PO Delivery Lines)}$
Based on Demand Lines	$\% \text{ (PO Demand Lines DIFOT) / (Total PO Demand Lines)}$

DIFOT-Schedules

This metric measures replenishment performance during the current period against Schedules. It has the following parameters:

Tolerance of Time	Enter the allowable number of days before and after the specified delivery date a shipment may arrive and still be considered "on time."
Tolerance of Quantity	Enter the allowable percentages under and over the specified delivery quantity a shipment may contain and still be consider "in full."
Pass Mark	Enter the percentage of times the metric is met for a supplier's performance considered to be acceptable.
Superiority Mark	Enter the percentage of times the metric is met for a supplier's performance considered to be excellent.
Evaluate Formula	Select the formula to be used from the menu: Based on Delivery Lines or Based on Demand Lines. Based on Delivery Lines is calculated by comparing the count of deliveries received DIFOT for the period against the total count of deliveries for the period. Based on Demand Lines is calculated by comparing the count of demands (PO lines with a due date and Schedule release details with a delivery date) that were received DIFOT in the period against the total demands for the period. See formulas below.

The formula used to calculate this metric is one of the following:

Based on Delivery Lines	$\% \text{ (Schedule Delivery Lines DIFOT) / (Total Schedule Delivery Lines)}$
Based on Demand Lines	$\% \text{ (Schedule Demand Lines DIFOT) / (Total Schedule Demand Lines)}$

Behind Schedule

This metric measures the percent of demand that is behind the due date during the current period. It has the following parameters:

Tolerance of Quantity	Enter the allowable percentages under and over the specified delivery quantity a shipment may contain and still be consider "in full."
Tolerance of Time	Enter the allowable number of days after the specified delivery date a shipment may arrive and still be considered "on time."

Pass Mark	Enter the percentage of times the metric is met for a supplier's performance considered to be acceptable. Note: since this is a negative metric, the "pass" percentage will be a higher number than the "superiority" percentage
Superiority Mark	Enter the percentage of times the metric is met for a supplier's performance considered to be excellent. Note: since this is a negative metric, the "superiority" percentage will be a lower number than the "pass" percentage

The formula used to calculate this metric is:

$$\frac{\% \text{ (Demand PO Lines or Schedule Details Received In Time)}}{\text{(Total Demand PO Lines or Schedule Details)}}$$

ASN Accuracy

This metric measures shipping performance by Advance Shipping Notices (ASNs) for the current period. It has the following parameters:

Tolerance of Quantity	Enter the allowable percentages under and over the specified delivery quantity a shipment may contain and still be consider "in full."
Tolerance of Time	Enter the allowable number of days before and after the specified delivery date a shipment may arrive and still be considered "on time."
Pass Mark	Enter the percentage of times the metric is met for a supplier's performance considered to be acceptable.
Superiority Mark	Enter the percentage of times the metric is met for a supplier's performance considered to be excellent.

The formula used to calculate this metric is:

$$\frac{\% \text{ (ASN Lines Delivered Accurately)}}{\text{(Total ASN Lines)}}$$

Times Exceeding Min/Max Levels

This metric measures the percentage of times that Quantity on Hand (QOH) falls outside specified minimum and maximum levels during the current period. It has the following parameters:

Pass Mark	Enter the percentage of times the metric is met for a supplier's performance considered to be acceptable. Note: since this is a negative metric, the "pass" percentage will be a higher number than the "superiority" percentage
Superiority Mark	Enter the percentage of times the metric is met for a supplier's performance considered to be excellent. Note: since this is a negative metric, the "superiority" percentage will be a lower number than the "pass" percentage

The formula used to calculate this metric is:

$$\frac{\% \text{ (Times Exceeding Min/Max Levels)}}{\text{(Specified Period)}}$$

CUM Disagree

The metric measures the performance ratio between Demand (Purchase Order, Schedule) and Advanced Shipping Notices (ASNs). It is the percentage of Demand quantities that have not shipped on time.

Pass Mark	Enter the percentage of times the metric is met for a supplier's performance considered to be acceptable. Note: since this is a negative metric, the "pass" percentage will be a higher number than the "superiority" percentage
Superiority Mark	Enter the percentage of times the metric is met for a supplier's performance considered to be excellent. Note: since this is a negative metric, the "superiority" percentage will be a lower number than the "pass" percentage

The formula used to calculate this metric is:

$$\frac{\% \text{ (Times ASNs Exceed Demand)}}{\text{(Specified Period)}}$$

Kanban On Time

The metric measures the percentage of kanbans that are delivered on time.

Tolerance of Time	Enter the allowable number of days after the specified delivery date a shipment may arrive and still be considered "on time."
Pass Mark	Enter the percentage of times the metric is met for a supplier's performance considered to be acceptable.
Superiority Mark	Enter the percentage of times the metric is met for a supplier's performance considered to be excellent.

The formula used to calculate this metric is:

$$\frac{\% \text{ (Kanbans On Time)}}{\text{(Total Kanbans)}}$$

Schedule Absolute Value Difference

This metric measures the Absolute Value Difference between the Quantity in the Schedule Detail Line and the Quantity in the ASN Line for the schedule.

Pass Mark	Enter the percentage of times the metric is met for a supplier's performance considered to be acceptable.
Superiority Mark	Enter the percentage of times the metric is met for a supplier's performance considered to be excellent.

The formula used to calculate this metric is:

$$\frac{(\text{Total of Order Qty} - \text{Quantity Variance: Abs Value Difference Total})}{\text{Total of Order Qty}}$$

Schedule SKU/Line Compliance

This metric measures the percentage of ASNs that match the Schedule details.

Pass Mark	Enter the percentage of times the metric is met for a supplier's performance considered to be acceptable.
Superiority Mark	Enter the percentage of times the metric is met for a supplier's performance considered to be excellent.

The formula used to calculate this metric is:

$$\frac{(\text{Total of Event measure of ASN})}{(\text{SKU/Line Item Compliance: Total of Event measure of order}) * 100}$$

Schedule Ship Date Performance

This metric measures the percentage of ASNs that have been shipped on the same date as the ship date in Schedule Detail Line.

Pass Mark	Enter the percentage of times the metric is met for a supplier's performance considered to be acceptable.
Superiority Mark	Enter the percentage of times the metric is met for a supplier's performance considered to be excellent.

The formula used to calculate this metric is:

$$\frac{(\text{Total of Ship Date Performance: Compliance to Order})}{(\text{Total of Ship Date Performance: Event measure of Order}) * 100}$$

Consigned Inventory Usage Detail

This view shows details for supplier-consigned inventory for an item at a site. Supplier-consigned inventory is planned, ordered, received, stocked, and tracked but accounts payable transactions are postponed until the inventory is used.

Use or consumption of an item can occur in a number of ways, such as:

- Issues to a work order, distribution order, repetitive order
- Unplanned issues

- Issues to a configured item final assembly order
- Transfers to another location or another site
- Shipment of pass-through parts (sales order shipments shipper confirm)

Consumption, visibility of material use, is the signal to the supplier to transfer the liability of the material on their system.

Column/Field Descriptions

This table includes all columns/fields that are available for display in the Consigned Inventory Detail view.

Customer. The customer name or description.

Note If this is a link, clicking the link opens the Customer Detail view.

Supplier. The supplier name or description is loaded from the ERP system or other data source. Note that during load operations for the VMI poller, if the supplier on a purchase order is changed and if the purchase order has any transactions (such as receipts or ASNs) or if the purchase order is a scheduled order, the supplier will not be changed on the purchase order

Item ID. The item number, name, or code from the customer ERP system or other data source.

Note When this field is a link, clicking this link opens the Item Detail view.

Item Description. This is the item description from the ERP system or other data source.

Supplier Item ID. The item number, name, or code used by the supplier. This is only displayed when it is different from the item ID from the ERP system.

Shipper ID. The ID is the identifying number for the shipper record.

Site. The name, number, or ID code for the site where the item was received.

Note If this field is a link, clicking this link opens the Site Detail view.

Site Description. This is the name of the site or information about the site from the customer ERP system or other data source.

Transaction Number. This number is unique and assigned by the ERP system.

Order Number. The purchase order number is from the ERP database.

Note If this field is a link, clicking the order number link displays the Purchase Order Detail view.

Line. Purchase order line number from the ERP database.

Note If this field is a link, clicking the order line number displays the Purchase Order Line Detail view.

Lot/Serial. This inventory transaction is associated with this lot/serial number. Lot/serial numbers facilitate tracking of all transactions associated with a sales or purchase order.

Reference. The lot reference provides additional information about the lot.

Receiver. This is the number assigned to the receiving record, the receiver, created by a receipt against a purchase order.

Used Quantity. This is the quantity used—in the UM for the item—in this transaction.

Cum Used Quantity. This is the cumulative quantity of consigned inventory used—in the UM for the item—for a PO line.

Receiver Qty Used. This is the quantity used from a particular receiver for a particular transaction. A transaction can cover quantities from multiple receivers.

UM. The unit of measure for quantities is from the purchase order line.

Used Date. This is the date the consigned quantity was used. The time component is in 24-hour format: YYYY-MM-DD HH:MM:SS; for example, 2004-06-07 16:02:32.

Transaction Type. This is the transaction name or code identifying the function that initiated the inventory change.

Transaction Date. This is the date that the transaction was entered in the system. The effective date for the transaction is Used Date.

Customer Detail

Organization Name. The customer company name.

Customer ID. The customer name, number, or code ID from the ERP system or other data source.

Address. The street address for the customer.

Web Address. The Internet URL for contacting the customer.

Contact Information. The contact information defined in QAD Supplier Portal for this customer.

DUNS Number. The unique nine-digit data universal numbering system (DUNS) number with a four-digit suffix identifying a specific location within your company; for example, a distribution center or a store. DUNS numbers are issued by Dun & Bradstreet to North American businesses and act as a unique identifier for electronic data interchange (EDI) and global electronic commerce transactions.

Only standard customer, consolidated customer, and consolidated supplier accounts can modify their DUNS number through Company Maintenance. Any modification to the regular supplier account DUNS number has to be made by the customer in their system of records. The DUNS number is not validated in QAD Supplier Portal.

Document Requests View

To make a document request, complete the Document Request view.

Click Save to store the data entered.

Column/Field Descriptions

This table includes all columns/fields that are available for display in the Document Request view.

Item ID. The identifier of the item.

Item Revision. The revision number of the item.

User's E-mail. Specifies the email address to which to send the requested documents.

Revision Comparison Report. Specifies whether to include revision comparison reports.

Latest Commercial Revisions. Specifies whether to include the latest commercial revisions.

File Type. Provides a drop-down box from which you can select the file type for the document.

Max. File Size (in KiloBytes). Specifies the maximum file size for the document.

Explosion Depth. Specifies the explosion depth for the hierarchical levels in a bill of materials.

Comparison Date. Specifies the comparison date for the document request. The default is the current date.

Document Request Log

The Document Request Log lists the document requests to the customer. This view is only available to customer Admin (administrative) users.

Refining the View

Use column sorting as well as the Filter and Display tabs or subtabs to refine the view. All users can refine the view displays.

Sort by Column. Click the column labels to sort the data rows.

Filter and Display Tabs/Subtabs. Go to the Filter tab or subtab to specify the search criteria for selecting which items to include in the current Data tab or subtab display. Go to the Display tab or subtab to specify which columns to include in the Data display.

Creating Reports

Go to the Print tab to specify report definitions. Reports are based on the data available as a result of the Filter and Display tab refinements.

Columns/Fields

This table includes all columns/fields that are available for display in the Invoices view. Not all of the available columns/fields are included in the default display.

Column/Field	Description
Action	Reports the request action (Export).
Admin Email Address	Provides the administrator's email address.
Comparison Date	Provides the date when the document request was created.
Data Source	Provides an identifier for the company database.
Explosion Depth	Identifies the maximum explosion depth for the hierarchical levels in a bill of materials.
File Type	Identifies the file type of the document.

Global Supplier	Identifies the global supplier.
Item Description	Provides a brief description of the item.
Item ID	Provides the item identifier.
Latest Commercial Revisions	Indicates whether to include the most recent commercial revisions (Y/N).
Max. File Size	Indicates the maximum file size of the document.
No Of Copies	Indicates the number of copies of the document.
Recipient Email Address	Indicates the recipient's email address.
Record ID / File name	Provides the record identifier or file name of the document.
Report Type	Indicates the report type (Part).
Requestor User ID	Provides the requester's user identifier.
Revision	Identifies the revision code or number of the document.
Site	Indicates the name, number, or code of the item's site.
Status	Indicates the status of the document request.
Supplier	Provides the name of the supplier.
Supplier ID	Provides the identifier of the supplier.
Transaction ID	Provides the identifier of the transaction.
Transaction Name	Provides the name of the transaction.
User Certificate	Indicates the user-provided security certificate (public key modulus and exponent). The security certificate identifies the user making a document request using the public key infrastructure X.509 format. (The Security Certificate ID field, located in the User Maintenance view's Security section, specifies the security certificate.)

Inventory Detail

Customer. The customer name, number, or code ID.

Note Clicking this link opens the Customer Detail view.

Item. The item number, name, or code from the customer ERP system or other data source.

Note Clicking this link opens the Item Detail view.

UM. The unit of measure for this item.

Site. The name, number, or ID code for the site.

Note Clicking this link opens the Site Detail view.

Quantity on Hand. The total quantity that MRP considers on hand—nettable is Yes—for this item at this time.

Quantity Available. Quantity available is the total quantity available to allocate for this item at this site.

Quantity Allocated. Quantity allocated is the total quantity of this item allocated at this site.

Quantity Required. The total quantity required for this item at this site.

Quantity Consigned. The total consigned quantity of an item at a site. See also “Consigned Inventory Usage Detail”.

Total Quantity. The total quantity that MRP considers on hand—nettable is Yes—for this item at this time.

Last Cycle Count Date. This date is the last date that a cycle count transaction was entered for this item at this site.

Refresh Date. This date is the most recent time this information was refreshed in the QAD Supplier Portal database.

Item Detail

Organization. The organization number, name, or code for the customer.

Item ID. The item number, name, or code from the customer ERP system or other data source.

Description. A description of the item.

UM. The unit of measure for the item.

Reference Links. Click the View/New/Edit button to display the Reference Link screen. The Reference Link screen lets you associate Uniform Resource Locators (URLs) with Items.

BOM Report. Click on the BOM Report to view the bill of materials report. If the BOM Report button is not available here, the BOM Report Functionality must be enabled for the Company and Supplier.

Document Request. A Document Request button is available here if:

- The document request policy of the company (Admin » Company » Company - Policies) is enabled.
- The document request policy of the supplier (Admin » Company » Supplier - Policies) is enabled.
- The Print File Types and/or Model File Types are specified (Admin » Company » Company - Preferences).
- The user security certificate is defined for the supplier (Admin » Company » User - Security).

Supplier. The ID of the supplier for this item.

Supplier Item ID. The item number, name, or code used by the supplier.

Item Policy Detail View

Item ID. The item number, name, or code from the customer ERP system or other data source.

Note When this field is a link, clicking this link opens the Item Detail view.

Description. The item description is from the ERP database. Only items associated with suppliers in the VMI working data set are visible in this view.

UM. Quantities are expressed in the unit of measure used for item stocking.

Site. Site ID is from the ERP database. Only sites associated with suppliers in the VMI working data set are visible.

Note Clicking the site ID link displays the Site Detail view.

Site Description. This is from the ERP database. Only sites associated with suppliers in the VMI working data set are visible.

Minimum Quantity. The minimum quantity of this item that you want to have in inventory. This value is not from the customer ERP system. This cannot be a negative number.

Order Point Quantity. The inventory level of the item at which an order for more items is initiated.

Maximum Quantity. The maximum quantity of this item that you want to have in inventory. This value is not from the customer ERP system. This cannot be less than one or less than the minimum quantity.

Order Multiple Quantity. Suppliers use this multiplier to determine quantities needed to replenish inventory.

When suggested replenishment quantity is not specified, QAD Supplier Portal uses this value, if it is non-zero, to generate a calculated replenishment quantity. This cannot be a negative number.

For details, see “Min/Max-Controlled Replenishment”.

Suggested Replenishment Quantity. If this value is zero, QAD Supplier Portal calculates a replenishment quantity based on maximum quantity, QOH, in-transit ASN quantity, and order multiple quantity.

QAD Supplier Portal displays suggested or calculated replenishment quantity in the Replenishment Qty column in either of these circumstances:

- When min/max is used and item inventory is less than minimum
- When order point is used and item inventory is less than order point

For details, see “Min/Max-Controlled Replenishment”.

Loop Status Detail

Active. Indicates whether the card is currently active or inactive in the loop.

Authorization Date. The date and time that the card was last authorized.

Buyer/Planner. The code—from the item-site—identifying the buyer or planner for this kanban loop.

Loop Status and Card State. The colors of the card icons indicate the state—Full, Empty, Shipped, and so on—of each kanban.

- Full.  The kanban container is full and available for consumption.
- Hold.  The kanban container is full but it is not available for consumption.
- Shipped.  The kanban has been shipped and is currently in transit to its destination. The status changes to Shipped when the status for the associated ASN changes to Shipped. The card status may be out of sync with the ERP system if the ASN is created in QAD Supplier Portal and the status is changed to Shipped in QAD Supplier Portal.

- In process.  The kanban is part of a loop with a FIFO lane. The kanban has completed any one but the last of the sequence of FIFO processes defined for the loop. See FIFO Lane in the Glossary.
- Empty accumulator.  The kanban is empty and being accumulated; it is not yet authorized for replenishment. See Accumulator in the Glossary.
- Empty authorized.  The kanban is empty and authorized for replenishment.
- Acknowledged.  The supplying source has acknowledged the requirement to fill the empty kanban.
- Order point.  Order point for the loop.
- Safety stock.  Safety stock or minimum number of full kanbans required for the loop.

Card Type. In a one-card kanban system, all the cards are replenishment cards. In a two-card kanban system, there can be move cards and replenishment cards.

Completed Process Count. For loops where there are defined FIFO processes and the card state is In Process, the number of FIFO processes that the card has completed. This does not include the source process.

EPE Interval. The EPE interval is the minimum time a process needs to make all the items it produces based on average demand. It is calculated for only the primary process when a loop has FIFO lanes.

FIFO Process Count. For loops where the source type is process and there are FIFO lanes defined, this is the number of FIFO processes in the loop. This does not include the source process.

Note For customers and suppliers, clicking the FIFO Process Count link displays the process detail.

Item ID. The item number, name, or code from the customer ERP system or other data source.

Note When this field is a link, clicking this link opens the Item Detail view.

Kanban ID. The kanban ID is the unique identifier for each kanban card.

Kanban Quantity. The number of items in each replenishment kanban.

Last Transaction Date. The date and time of the last transaction that was reported for this kanban ID.

Last Transaction Name. The name of the last transaction that was reported for this kanban ID:

- Acknowledge
- Authorize
- Consume with accumulator
- Consume without accumulator
- Fill
- Hold
- Release
- Ship

Last Transaction User ID. The name of the user who performed the last transaction for this kanban ID.

Loop Size. The current number of kanban—active cards—in the loop.

Move Time. Move time is the total time in days, hours, minutes, and seconds that it takes to move items between operations in this process.

Next Process. For loops where there are defined FIFO processes and the card state is In Process, the ID code for the next process in the FIFO process sequence.

Pitch Interval. Pitch interval is the product of pitch quantity and takt time. Pitch quantity is a multiple of kanban quantity, the number of items per kanban. Pitch is a management time frame representing the frequency at which you withdraw finished goods from a pacemaker process as well as the corresponding amount of schedule you can release to that process.

Pitch Quantity. Pitch quantity is a multiple of kanban quantity, the number of items per kanban.

Pitch UM. Pitch UM is the unit of measure associated with the value specified for pitch quantity.

Process Code. The alphanumeric code representing this process.

Sequence. The position of each FIFO process in the sequence of the FIFO processes in a loop.

Source Type. Supplying source types are supermarket, supplier, inventory, and process.

Step. The unique code for identifying the specific step that the loop represents in the entire manufacturing process for an item. Step is part of the unique identifier for each loop. Although Step may reflect routings and operations in the ERP system, it is defined independently of them.

Supermarket ID. The ID for the consuming supermarket for this loop.

Supermarket Site. The ID for the supermarket site that consumes kanban items for this loop.

Note For customers and suppliers, clicking the destination ID link displays the address detail.

Supplying Reference. Supplying reference is dependent on supplying source type.

- Supplier: Purchase order ID
- Inventory: Supplying supermarket ID
- Process: Process ID

Supplying Source. The supplier ID when the supplying source type is a supplier or the site ID when the supplying source type is inventory or process.

Note For customers and suppliers, clicking the link displays the address and contacts detail for suppliers and the site detail for sites.

Takt Time. Takt time is the time required to produce one unit at the customer's rate of demand.

Time Available. Time available is the total time available on each daily shift; it is based on calendar records.

Total Lead. Time In loops with FIFO lanes, this total includes the processing time at the primary process—the supply source—plus the cumulative processing time for all of the FIFO processes in the loop. The format is DD:HH:MM:SS, that is, days:hours:minutes:seconds.

Purchase Order Detail

All of these detail values are from the customer's ERP system or another data source.

Purchase Order Header

Customer. The customer name, number, or code ID.

Note Clicking this link opens the Customer Detail view.

Supplier. The supplier company name.

Note Clicking this link opens the Supplier Address Detail view.

Order. The purchase order number.

Order Date. The date the purchase order was made.

Status. The order status: open, closed, or canceled.

Acknowledge Status. The acknowledged state for the purchase order line, which can include following:

- Pending
- Item accepted and shipped
- Item accepted, date rescheduled
- Item accepted
- Item accepted, changes made
- Item deleted
- Item accepted, price changed
- Item accepted, quantity changed
- Re-Acknowledge

Ship To. The address code, from the ERP database, for the ship-to address.

Note Clicking the address code displays the Ship-to Address Detail view.

Revision. The revision level of the purchase order.

PO Cur. The currency of the purchase order.

Carrier. As specified on the PO trailer; it defaults from the ERP system.

Free On Board. FOB indicates where title passes to the buyer; it is often used to indicate who pays shipping charges.

Contact Information. The contact information defined in QAD Supplier Portal for this supplier.

Comments. Clicking this link displays purchase order line comments view.

Order Type. The type of order: standard, blanket, released. Blanket orders are relevant to only kanban loops.

Blanket Order. For released orders for kanban loops, this is the number of the parent blanket order associated with the loop. ASNs can be created from released orders but not from a blanket order.

Note In the Orders view, clicking the blanket order number displays the Purchase Order Detail view with information for that blanket order.

Reference Links. Clicking this button displays the Reference Link screen. The Reference Link screen lets you associate Uniform Resource Locators (URLs) with purchase order headers.

PO Audit Trail. Click this button to display the PO audit trail. (This option is only available to customer Admin users.)

PO Cur. This is the purchase order (PO) currency.

Purchase Order Lines

Line. The purchase order line number assigned by the ERP system.

Acknowledge Status. The acknowledged state for the purchase order line, which can include following:

- Pending
- Item accepted and shipped
- Item accepted, date rescheduled
- Item accepted
- Item accepted, changes made
- Item deleted
- Item accepted, price changed
- Item accepted, quantity changed
- Re-Acknowledge

Site ID. The code for the site where the item is to be delivered.

Note Clicking this link opens the Site Detail view.

Site Description. This is the name of the site or information about the site from the customer ERP system or other data source.

Item ID. The item number, name, or code.

Note Clicking this link opens the Item Detail view.

Item Description. The item description.

Note Clicking this link opens the Item Detail view.

Supplier Item ID. The item number, name, or code used by the supplier.

Supplier Item Description. The item description used by the supplier.

UM. The unit of measure for quantities is from the purchase order line.

Order Qty. The quantity of the item ordered on this line.

UM Conversion. The conversion factor to use if the UM for the line differs from the UM in the item master definition in the ERP system.

Unit Cost. This is the entered or default unit cost for the line item. If no cost is entered in the ERP system, the system uses the default cost from price and discount tables, supplier quotes, or the general ledger material cost for the item.

Status. Indicates whether the PO line is open, canceled, or closed.

Due Date. The date when the item is due to be received at the specified site.

Sales Order/Job. This optional code associates an order line with a specific sales or job number.

Performance Date. The supplier promised delivery on this date.

Need Date. The date when the items must be available to ship or issue to manufacturing. It should be the due date plus any inspection lead time.

Comments. Clicking this link displays purchase order line comments view.

Order Line Type. The type of order line: standard, blanket, released.

Blanket Line. For released orders for kanban loops, this is the line number of the parent blanket order that is addressed by the released PO.

Item Revision. This is the item revision number as specified on the PO.

Taxable. Indicates whether the purchase order line is subject to tax.

Note Tax-related fields are only available when Tax Info Loading Policy is set to Allow Tax Info Loading in Admin » Company » Company Maintenance » Policies.

Tax In. Indicates whether tax is included in the price.

Tax Rate %. Specifies the tax rate percentage associated with a taxable line, based on a group of tax parameters on a PO line: Tax Usage, Tax Class, Tax Environment.

Reset Acknowledgments

If a supplier has made a mistake or the customer wants the supplier to revisit the PO, the customer (company) Admin user can reset the acknowledgments by clicking the Reset Acknowledgments button. Only the customer Admin user can use the Reset Acknowledgments button.

Purchase Order Line Detail

All of these detail values are from the customer's ERP system or other data source.

Order. This is the purchase order number from the ERP database.

Note Clicking the order number displays the Purchase Order Detail view.

Line. The purchase order line number assigned by the ERP system.

Site ID. The code for the site where the item is to be delivered.

Note Clicking this link opens the Site Detail view.

Site Description. This is the name of the site or information about the site from the customer ERP system or other data source.

Item ID. The item number, name, or code.

Note Clicking this link opens the Item Detail view.

Item Description. The item description.

Note Clicking this link opens the Item Detail view.

Supplier Item ID. The item number, name, or code used by the supplier.

Supplier Item Description. The item description used by the supplier.

UM. The unit of measure for quantities is from the purchase order line.

Order Qty. The quantity of the item ordered on this line.

UM Conversion. The conversion factor to use if the UM for the line differs from the UM in the item master definition in the ERP system.

Unit Cost. This is the entered or default unit cost for the line item. If no cost is entered in the ERP system, the system uses the default cost from price and discount tables, supplier quotes, or the general ledger material cost for the item.

Status. Indicates whether the PO line is open, canceled, or closed.

Due Date. The date when the item is due to be received at the specified site.

Ship To. The address code, from the ERP database, for the ship-to address.

Note Clicking the ship-to link displays the Ship-to Address Detail view.

Sales Order/Job. This optional code associates an order line with a specific sales or job number.

Performance Date. The supplier promised delivery on this date.

Need Date. The date when the items must be available to ship or issue to manufacturing. It should be the due date plus any inspection lead time.

Acknowledge Status. The acknowledged state for the purchase order line, such as Pending or Item Accepted.

Comments. Clicking this link displays purchase order line comments view.

Order Line Type. The type of order line: standard, blanket, released.

Blanket Order. For released orders for kanban loops, this is the number of the parent blanket order associated with the loop. ASNs can be created from released orders but not from a blanket order.

Note In the Orders view, clicking the blanket order number displays the Purchase Order Detail view with information for that blanket order.

Blanket Line. For released orders for kanban loops, this is the line number of the parent blanket order that is addressed by the released PO.

Reference Links. Clicking this button displays the Reference Link screen. The Reference Link screen lets you associate Uniform Resource Locators (URLs) with purchase orders.

Item Revision. This is the item revision number as specified on the PO.

Taxable. Indicates whether the purchase order line is subject to tax.

Note Tax-related fields are only available when Tax Info Loading Policy is set to Allow Tax Info Loading in Admin » Company » Company Maintenance » Policies.

Tax In. Indicates whether tax is included in the price.

Tax Rate %. Specifies the tax rate percentage associated with a taxable line, based on a group of tax parameters on a PO line: Tax Usage, Tax Class, Tax Environment.

Purchase Order Header Comment

Use the comment icon in the PO Header Comment column of the Orders view to review comments linked to the PO header in the ERP database.

Column/Field	Description
Order	The purchase order number.
Line	Purchase order line number from the ERP database.
Item ID	The item number or code used by the supplier.
Site	The number or code for the site.
Comment	These comments from the PO header in the ERP database are read-only.

Purchase Order Line Comment

Use the comment icon in the PO Line Comment column of the Orders view to review PO lines comments from the ERP system.

Column/Field	Description
Order	The purchase order number.
Line	Purchase order line number from the ERP database.
Item ID	The item number or code used by the supplier.
Site	The number or code for the site.
Comment	These comments from the ERP database are read-only.

Purchase Order Line QAD Supplier Portal Comment

Use the comment icon in the QAD Supplier Portal Comment column of the Orders view to link comments to purchase order lines. To create the comment, click the icon in the relevant data rows to display the screen: Add Purchase Order Line QAD Supplier Portal Comment. These comments appear on the Purchase Order Line Acknowledgment screen.

Column/Field	Description
Order	The purchase order number.
Line	Purchase order line number from the ERP database.
Item	The item number or code used by the supplier.
Site	The number or code for the site.
Comment	Enter here any comment related to a purchase order line that you want to appear on the Purchase Order Line Acknowledgment screen.

Purchase Order Audit Trail View

QAD Supplier Portal maintains an audit trail record for keeping track of PO header and PO line acknowledgment status changes. The audit record stores information about who changed a status, when the status was changed, and other important fields. The PO Audit Trail view displays the audit trail record. This view is only available to the customer Admin user.

Updating the Data

For information on when QAD Supplier Portal updates the various fields in the view, see “Update History”.

User-Defined Fields

User-defined fields (UDFs) can be created for the Min/Max, Kanban Board, Orders, Schedules, ASN Headers, Receipts, and Invoice views. Use Admin » Company » Company Maintenance » User Labels subtab to define labels for the fields for each of these views.

Update Icon.  Click the update icon in the far-right column to open the User-Defined Fields screen for updating the values in the user-defined fields.

Note An export feature provides users with the ability to export UDFs from QAD Supplier Portal to the Poller client. The Policies tab in Company Maintenance contains a policy to control the export feature for UDFs. See “Policies”.

Refining the View

Use column sorting as well as the Filter and Display tabs or subtabs to refine the view. All users can refine the view displays.

Sort by Column. Click the column labels to sort the data rows.

Filter and Display Tabs/Subtabs. Go to the Filter tab or subtab to specify the search criteria for selecting which items to include in the current Data tab or subtab display. Go to the Display tab or subtab to specify which columns to include in the Data display.

Creating Reports

Go to the Print tab to specify report definitions. Reports are based on the data available as a result of the Filter and Display tab refinements.

Column/Field Descriptions

This table includes all columns/fields that are available for display in the view.

User ID. The initial admin account user ID defined here for a supplier company belongs to the supplier admin security group. Users logging in on this account can define admin and non-admin users for the supplier company in User Maintenance. Once this ID has been defined, it becomes a display-only field that cannot be modified.

Order Date. The date and time of purchase order acknowledgment.

Order Number. The purchase order number.

Revision. The revision level of the purchase order can optionally be incremented with each change to the purchase order.

Supplier ID. The identifying number or ID code for a supplier is loaded from the ERP system or other data source. For VMI items, only suppliers associated with item-sites in the VMI working data set are available in the views.

Link: When this field is a link, clicking the link opens the Supplier Address Detail view.

Ship To. The address code for the ship-to address is from the ERP database.

Ship-to names attached to new receipts in the ERP system are updated in QAD Supplier Portal as frequently as every five minutes. All ship-to names are updated no more than once per hour in the general working data set update from the ERP system.

Link: When this field is a link, clicking the link displays the Ship-to Address Detail view.

PO Cur. This is the purchase order (PO) currency.

PO Ack Status. This is the purchase order (PO) acknowledgment status.

Line. Purchase order line number from the ERP database.

Link: If this field is a link, clicking the order line number displays the Purchase Order Line Detail view.

Quantity. This is the quantity the supplier is planning to ship.

Unit Cost. This is the entered or default unit cost for the line item. If no cost is entered in the ERP system, the system uses the default cost from price and discount tables, supplier quotes, or the general ledger material cost for the item.

Item ID. The item number, name, or code from the customer ERP system or other data source.

Link: When this field is a link, clicking this link opens the Item Detail view.

Item Revision. This is the item revision number as specified on the PO.

Due Date. The date when the item is due to be received at the specified site.

Need Date. The date when the items must be available to ship or issue to manufacturing. It should be the due date plus any inspection lead time.

Ship Via. The shipping method.

Line Ack Status. This is the purchase order (PO) line acknowledgment status.

Schedule Detail

All of these detail values are from the customer's ERP system or other data source.

Order Number. The purchase order number.

Note Clicking this link opens the Purchase Order Detail view.

Customer. The customer name, number, or code ID.

Note Clicking this link opens the Customer Detail view.

Supplier. The supplier company name.

Note Clicking this link opens the Supplier Address Detail view.

Ship-to ID. The address code identifying where the items on the order should be delivered.

Note Clicking this link opens the Ship-to Address Detail view.

Line. Purchase order line number from the ERP database.

Note Clicking the order line number displays the Purchase Order Line Detail view.

Customer Item ID. The customer's name, number, or code for the item.

Note Clicking this link opens the Item Detail view.

UM. The unit of measure to use for this line item.

Site. The code for the site where the item is to be delivered.

Note Clicking this link opens the Site Detail view.

Release Number. Identifies a specific version (release) of a customer schedule. Each customer schedule is identified by a sales order number, line item, and release ID, allowing the system to maintain multiple releases of the same schedule, keeping complete online history of all schedule revisions.

Release Status. Indicates the schedule status. A release is active until it is superseded by a new release of the schedule.

Reference. This is the reference number of the scheduled receipt. Schedule detail records are uniquely identified with the combination of Date, Time, and Reference number.

Period. This is the interval that the scheduled quantity covers.

Quantity Qualifier. Indicates whether the net required quantity for this schedule detail line represents a firm or planned requirement. The net required quantity for a detail line is the amount by which the cumulative required quantity exceeds the cumulative quantity received against that line.

Firm: The net required quantity for this detail line represents a firm requirement. MRP considers firm requirements as sources of supply, like discrete purchase orders. Usually, only near-term requirements are identified as firm.

Planned: The net required quantity for this detail line is not considered a source of supply by MRP.

Delivery Date. The customer requires delivery on this date.

Ship Date. The ship dates displayed in the Schedules view are the same as those in the schedule report accessed through the schedule type icon or the report icon. These dates are based on transportation lead time and the schedule horizon—numbers of days, weeks, and months for quantity bucketing—defined for each schedule order line and used in reports and releases for the order line. If the ship date for a line in the Schedules view is beyond the schedule horizon defined for the order line, no ship date is displayed in the view.

Ship Qty. The quantity of the item shipped.

Cum Quantity. The cumulative quantity of this item required by the customer by the delivery date.

Net Required Qty. Informs the supplier of the quantity required to ship. If the cell is colored red then the shipment is late. This is not a database field; it is calculated locally taking into account receipts made against the scheduled order line. The Net Req Qty = Cum Req Qty - Cum Rcvd Qty.

Reference Links. Click the link to view, edit, or create reference links using the Reference Link screen.

Schedule Order Line Detail

All of these detail values are from the customer's ERP system or other data source.

Order Number. The purchase order number.

Note Clicking this link opens the Purchase Order Detail view.

Customer. The customer name or description.

Note If this is a link, clicking the link opens the Customer Detail view.

Ship To. The address code for the ship-to address is from the ERP database.

Ship-to names attached to new receipts in the ERP system are updated in QAD Supplier Portal as frequently as every five minutes. All ship-to names are updated no more than once per hour in the general working data set update from the ERP system.

Note When this field is a link, clicking the link displays the Ship-to Address Detail view.

Line. Purchase order line number from the ERP database.

Note If this field is a link, clicking the order line number displays the Purchase Order Line Detail view.

Customer Item ID. The item number, name, or code from the customer ERP system or other data source.

UM. The unit of measure to use for this line item.

Site. The code for the site where the item is to be delivered.

Note Clicking this link opens the Site Detail view.

Firm Days. The number of days in the schedule firm interval. The firm interval begins one day after the date in Prior Cum Date.

Schedule Days. For planning, this is the number of days for which order detail is given in daily quantities.

Schedule Weeks. For planning, this is the number of weeks that the schedule is given in weekly quantities.

Schedule Months. For planning, this is the number of months that the schedule is given in monthly quantities.

Fabrication Authorization Days. Customers commit to pay for goods fabricated according to the schedule for this many days of the schedule.

Raw Material Authorization Days. Customers commit to pay for raw materials purchased to meet the schedule for this many days of the schedule.

Transportation Lead Time. When the supplier makes but does not deliver the units, this is the number of days of transport from the supplier location to the delivery location.

Safety Lead Time. For perpetually late or unreliable suppliers, this is the number of days before the actual need date that the schedule requests delivery.

Maximum Order Quantity. This is the maximum order quantity that is authorized to be shipped against the scheduled order.

Cum Start Current. CUM quantities include requested deliveries from this date forward.

Start Effective Date. The schedule is valid, that is, in effect on this date.

End Effective Date. The schedule is no longer valid, that is, it is no longer in effect after this date.

Standard Pack Quantity. The multiple in which orders for this item are shipped; for example, a box of 144 pencils.

Ship Delivery Pattern ID. The ID code for the defined pattern of days of the week or month that deliveries can be received at the site.

Schedule Line Detail

All of these detail values are from the customer's ERP system or other data source.

Order Number. The purchase order number.

Note Clicking this link opens the Purchase Order Detail view.

Customer. The customer name, number, or code ID.

Note Clicking this link opens the Customer Detail view.

Supplier. The supplier company name.

Note Clicking this link opens the Supplier Address Detail view.

Ship-to ID. The address code identifying where the items on the order should be delivered.

Note Clicking this link opens the Ship-to Address Detail view.

Line. Purchase order line number from the ERP database.

Note Clicking the order line number displays the Purchase Order Line Detail view.

Customer Item ID. The customer's ID name, number, or code for the item.

Note Clicking this link opens the Item Detail view.

UM. The unit of measure to use for this line item.

Site. The code for the site where the item is to be delivered.

Note Clicking this link opens the Site Detail view.

Release. Identifies a specific version (release) of a customer schedule. Each customer schedule is identified by a sales order number, line item, and release ID, allowing the system to maintain multiple releases of the same schedule, keeping complete online history of all schedule revisions.

Release Status. Indicates the schedule status. A release is active until it is superseded by a new release of the schedule.

Prior Cum Quantity. The total of previous requests for shipments (schedule releases) up to and including the prior cumulative date.

Prior Cum Date. The ending date of the period summed to produce the prior cumulative quantity.

Active Start Date. The schedule release is active, that is, it is in effect on this date.

Active End Date. The schedule release is no longer active, that is, it is no longer in effect after this date.

Authorized Fabrication Quantity. The maximum quantity of fabricated or manufactured items the supplier is authorized to produce in anticipation of future demand.

Fabrication Quantity Start Date. The start date of the period for the authorized fabrication quantity.

Fabrication Quantity End Date. The last date of the period for the authorized fabrication quantity.

Authorized Raw Material Quantity. The maximum quantity of the item for which the supplier is authorized to purchase raw materials in anticipation of future production.

Raw Material Qty Start Date. The start date of the period over which the raw material quantity has been authorized.

Raw Material Qty End Date. The ending date of the period over which the raw material quantity has been authorized.

Reference Links. Click the View/New/Edit button to display the Reference Link screen. The Reference Link screen lets you associate Uniform Resource Locators (URLs) with Schedules.

Schedule Replenishment

With the Schedule Replenishment page, suppliers can focus on items that need to be shipped. The page displays next scheduled deliveries, arrears, over shipments, and replenishment quantities for all schedule-controlled items.

Go to Schedules » Schedule Replenishment to display information on a daily basis about the next scheduled delivery, arrears, overshipments, and replenishment quantities. The schedule replenishment quantity changes on a daily basis when a receipt, an ASN, or a schedule is created or updated.

Schedule-controlled items are items whose Replenishment Calculation Policy is set to Schedule controlled replenishment. Customer admin users set the policy for each item in the Replenishment Calculation Policy field in Admin » Item » Item —Item tab, Policy subtab.

An order line will not be displayed on the Schedule Replenishment page if:

- there are no arrears
- there are no overshipments
- all the quantity scheduled for today's date (if any) has been received
- there are no future schedule details

Updating the Data

For information on when QAD Supplier Portal updates the various fields in the view, see “Update History”.

User-Defined Fields

User-defined fields (UDFs) can be created for the Min/Max, Kanban Board, Orders, Schedules, ASN Headers, Receipts, and Invoice views. Use Admin » Company » Company Maintenance » User Labels subtab to define labels for the fields for each of these views.

Update Icon.  Click the update icon in the far-right column to open the User-Defined Fields screen for updating the values in the user-defined fields.

Note An export feature provides users with the ability to export UDFs from QAD Supplier Portal to the Poller client. The Policies tab in Company Maintenance contains a policy to control the export feature for UDFs. See “Policies”.

Refining the View

Use column sorting as well as the Filter and Display tabs or subtabs to refine the view. All users can refine the view displays.

Sort by Column. Click the column labels to sort the data rows.

Filter and Display Tabs/Subtabs. Go to the Filter tab or subtab to specify the search criteria for selecting which items to include in the current Data tab or subtab display. Go to the Display tab or subtab to specify which columns to include in the Data display.

Quantity Qualifier. This selection lets you filter out the sum of Arrears and Overshipments based on the detail line Quality Quantifier value. The default is All, meaning that the default view includes all the detail lines in the current schedule release, regardless of Quantity Qualifier value.

Other values include:

F: Calculate Arrears and Overshipments only by the schedule release detail lines where Quantity Qualifier = F

P: Calculate Arrears and Overshipments only by the schedule release detail lines where Quantity Qualifier = P

Creating Reports

Go to the Print tab to specify report definitions. Reports are based on the data available as a result of the Filter and Display tab refinements.

Columns/Fields

This table includes all columns/fields that are available for display in the Schedule Replenishment view. Not all of the available columns/fields are included in the default display.

Defined and Named Alerts.  or  The bell icon in a data line indicates that the data line is monitored as a target data line in at least one user-defined alert. Exceptions: alerts such as New VMI working data set selection and Average demand out of tolerance that are aimed at the customer organization rather than a single data line do not display the icon since it would apply to all data lines.

Alerts Notifications.  or  The envelope icon in a data line indicates that alert notifications have been sent regarding that target data line.

Arrears. Arrears are calculated locally, taking into account receipts made against the scheduled order line. Quantities scheduled for today and not yet received or in-transit do not count as arrears. The arrears calculation only counts quantities that are past due.

Arrears = Cum Req Qty - Cum Rcvd Qty - In Transit Qty (only in-transit quantities with a delivery date prior to today)

If the result is a negative number, arrears is set to zero. When the net required quantity is greater than zero and the delivery date is prior to the user's system date, the Arrears cell is red.

Carrier. The name of the carrier transporting the material.

CustNumeric1-3. Labels for up to three user-defined numeric fields that are visible to customers only.

CustSupplierDate1-3. Labels for up to three user-defined date fields that are visible to customers and suppliers.

CustSupplierNumeric1-3. Labels for up to three user-defined numeric fields that are visible to customers and suppliers.

CustSupplierText1-3. Labels for up to three user-defined text fields that are visible to customers and suppliers.

CustText1-3. Labels for up to three user-defined text fields that are visible to customers only.

Delivery Date. The customer requires delivery on this date.

FOB. FOB (Free On Board) indicates where title passes to the buyer; it is often used to indicate who pays shipping charges.

Item ID. The item number, name, or code from the customer ERP system or other data source.

Note When this field is a link, clicking this link opens the Item Detail view.

Item Description. This is the item description from the ERP system or other data source.

Line. The schedule order line number is from the ERP database.

Note Clicking the order line number displays the Scheduled Order Line Detail view.

Order. This is the purchase order number from the ERP database.

Note When there is a link, clicking the order number displays the Purchase Order Detail view with information for that order.

Overshipments. The overshipments quantity equals today's cumulative received quantity plus the in-transit quantity minus today's cumulative required quantity:

$$\text{Overshipments Qty} = \text{Cum Rcvd Qty} + \text{In-Transit Qty} - \text{Cum Req Qty}$$

When QAD Supplier Portal calculates overshipments, it takes into account any shipments against scheduled order lines with dates greater than today's date.

If the calculated overshipment quantity is less than zero, then the overshipment quantity is set to zero.

Reference. This is the reference number of the scheduled receipt. Schedule detail records are uniquely identified with the combination of Date, Time, and Reference number.

Refresh Date. This is the most recent time—date, time, time zone—the record was updated in the QAD Supplier Portal database.

For ASNs, the field displays a refresh date only if the ASN was created outside of QAD Supplier Portal; if the ASN was created in QAD Supplier Portal, the field is blank.

Release. This is the number of the release against the supplier schedule order.

Note If this is a link, clicking the release number link displays the Schedule Line Detail view.

Replenishment Quantity. This is the calculated replenishment quantity for schedule-controlled items as defined in Item Maintenance.

Revision. The revision level of the purchase order can optionally be incremented with each change to the scheduled purchase order.

Schedule Type. Icons indicate the type of schedule.

- Combined, non-PRO/PLUS schedules. 
- Planning. 
- Shipping. 
- Forecasted, Other. 

Clicking the icon displays a report with the supplier schedule detail for that row. Go to the Print tab to create a report with supplier schedule details for all active schedules with non-zero requirements for suppliers on all pages—as defined by Rows per Page—in the view.

Schedules can be printed when the Print Schedule flag is true (or yes). For the MFG/PRO poller, this flag can be set in Schedule Maintenance. For the Integration Kit poller, this flag can be set by specifying the value in the PrintSchd XML element. The Schedule Type icon will be enabled to print the report when the Print Schedule flag is set to true (or yes). In the Print tab, the Active Schedule Report option is available when the Print Schedule flag is set to true (or yes).

- **Line Graph Icon.**  Click the line graph icon for a schedule to display the Schedule Graph Option screen. Select a graph and click OK.

Ship Date. When the customer ERP system is MFG/PRO, the ship dates displayed in the Schedules view are the same as those in the schedule report accessed through the schedule type icon or the Print tab.

These dates are based on transportation lead time and the schedule horizon—numbers of days, weeks, and months for quantity bucketing—defined for each schedule order line and used in reports and releases for the order line.

If the ship date for a line is beyond the schedule horizon defined for the order line, no ship date is displayed in the Schedules view.

For all other ERP systems, the ship date displayed in the Schedules view is the date supplied by the ERP system.

Ship Delivery Pattern ID. The ID code for the defined pattern of days of the week or month that deliveries can be received at the site.

Ship Delivery Pattern Name. The name for the defined pattern of days of the week or month that deliveries can be received at the site.

Ship To. The address code for the ship-to address is from the ERP database.

Ship-to names attached to new receipts in the ERP system are updated in QAD Supplier Portal as frequently as every five minutes. All ship-to names are updated no more than once per hour in the general working data set update from the ERP system.

Note When this field is a link, clicking the link displays the Ship-to Address Detail view.

Site. Site ID is from the ERP database. Only sites associated with suppliers in the VMI working data set are visible.

Note Clicking the site ID link displays the Site Detail view.

Standard Pack Quantity. The multiple in which orders for this item are shipped; for example, a box of 144 pencils.

Supplier. The supplier name or description is loaded from the ERP system or other data source. Note that during load operations for the VMI poller, if the supplier on a purchase order is changed and if the purchase order has any transactions (such as receipts or ASNs) or if the purchase order is a scheduled order, the supplier will not be changed on the purchase order.

Supplier Business ID. This field is relevant only for consolidated accounts with multiple linked supplier accounts. The supplier business ID—set by the supplier in Admin » Company » Company —differentiates data for the same supplier from multiple ERP systems or data sources.

The default is the supplier identifying number or ID code that is loaded in QAD Supplier Portal from the customer's ERP system or other data source.

Supplier ID. The identifying number or ID code for a supplier is loaded from the ERP system or other data source. For VMI items, only suppliers associated with item-sites in the VMI working data set are available in the views.

Note When this field is a link, clicking the link opens the Supplier Address Detail view.

Supplier Item Description. The item description used by the supplier can be brought into the QAD Supplier Portal database through the Integration Kit as the SupplierItemDescription element; this description is not available from MFG/PRO.

This description is displayed only when it is different from the item description.

Supplier Item ID. The item number, name, or code used by the supplier. This is only displayed when it is different from the item ID from the ERP system.

Transportation Lead Time. When the supplier makes but does not deliver the units, this is the number of days of transport from the supplier location to the delivery location.

UM. The unit of measure for quantities is from the purchase order line.

Replenishment Calculations

QAD Supplier Portal supports replenishment calculations based on min/max quantities and on scheduled quantities. Customer admin users specify the approach for each item in the Replenishment Calculation Policy field in Admin » Item » Item Maintenance—Item tab, Policy subtab.

The poller calculates the replenishment quantities during the hourly update of the working data set.

Schedule-Controlled Replenishment

When Replenishment Calculation Policy is set to schedule controlled for items, QAD Supplier Portal follows these steps in calculating the replenishment quantity.

- 1 From the integration kit, the poller loads the schedule replenishment horizon (days) for the item-site, if the schedule is active and has an interval of daily, weekly, or monthly. The schedule replenishment horizon can also be entered manually in Admin » Company » Item » Item Maintenance.
- 2 If the Include Site/Holiday Calendar in Calculation field is enabled in the demand calculation template assigned to the item-site, the poller includes the calendars when calculating the number of work days in the horizon:

Start Date = Today

End Date = Today + Schedule Replenishment Horizon Days

Example: If today is Wednesday, 9 February and horizon is five days:

Schedule Replenishment Date Period = Wednesday + five days (calendar = Thursday, Friday, Monday, Tuesday, Wednesday)

- 3 QAD Supplier Portal calculates the replenishment quantity: Replenishment Quantity = total release quantity through the schedule release date

Example: Using the schedule release date from the above example, if there is a requirement on the active schedule for 100 on Thursday, 10 February and a requirement for 50 on Monday, 14 February:

Replenishment Quantity = (100 + 50)

If an active shipping schedule overlaps with an active planning schedule for the item-site, the quantity in the shipping schedule is considered in the calculation. If daily, weekly, and monthly schedules overlap:

- Daily schedules have precedence over weekly and monthly schedules.
- Weekly schedules have precedence over monthly schedules.
- If the Release Date falls in the middle of a weekly or monthly schedule, then divide the weekly/monthly quantity equally over the number of working days in the week/month.

Min/Max-Controlled Replenishment

When Replenishment Calculation Policy is set to min/max-controlled for items, QAD Supplier Portal calculates the replenishment quantity based on user-specified values for: order point, suggested replenishment quantity, order multiple, replenishment modifier, and rounding percentage for an item-site in Admin » Item » Item Maintenance—Item tab, Policies subtab.

The following shows the calculation logic:

```

IF (Order Point = 0 and (QOH + ASNs) > Max)
  OR
  (Order Point <> 0 and (QOH + ASNs) > Order Point) THEN
  Replenishment Qty = 0
ELSIF (Order Point = 0 and (QOH + ASNs) <= Max)
  OR
  (Order Point <> 0 and (QOH + ASNs) <= Order Point) THEN
  IF Suggested Replenishment Qty <> 0 THEN
    Replenishment Qty = Suggested Replenishment Qty
  ELSIF Suggested Replenishment Qty = 0
    Replenishment Qty = Maximum Qty - (QOH + ASNs)
  ENDIF
ENDIF

```

QAD Supplier Portal continues the calculation with the order multiple and replenishment quantity rounding values:

- If Order Multiple = 0:
Replenishment Qty = Replenishment Qty
- When Order Multiple <> 0:
 - If rounding is Round Up, QAD Supplier Portal rounds replenishment qty up to the nearest Order Multiple.
 - If rounding is Round Down, QAD Supplier Portal rounds replenishment qty down to the nearest Order Multiple.

- If rounding is percentage based, QAD Supplier Portal calculates the remainder and then applies the rounding percentage:

$\text{remainder} = \text{modulo}(\text{replenishment qty}, \text{Order Multiple})$

Round replenishment qty up to the nearest Order Multiple if:

$\text{remainder}/\text{Order Multiple} \Rightarrow \text{Rounding \%}$

Round replenishment qty down to the nearest Order Multiple if:

$\text{remainder}/\text{Order Multiple} < \text{Rounding \%}$

Shipping Forecast Detail

Customer. The customer name or description.

Note If this is a link, clicking the link opens the Customer Detail view.

Supplier. The supplier name or description is loaded from the ERP system or other data source. Note that during load operations for the VMI poller, if the Supplier on a Purchase Order is changed and if the Purchase Order has any transactions (such as receipts or ASNs) or if the Purchase Order is a scheduled order, the Supplier will not be changed on the Purchase Order.

Order Number. The purchase order number is from the ERP database.

Note Clicking the order number link displays the Purchase Order Detail view.

Line. Purchase order line number from the ERP database.

Note If this field is a link, clicking the order line number displays the Purchase Order Line Detail view.

Ship To. The address code for the ship-to address is from the ERP database.

Ship-to names attached to new receipts in the ERP system are updated in QAD Supplier Portal as frequently as every five minutes. All ship-to names are updated no more than once per hour in the general working data set update from the ERP system.

Note When this field is a link, clicking the link displays the Ship-to Address Detail view.

Item ID. The item number, name, or code from the customer ERP system or other data source.

Note When this field is a link, clicking this link opens the Item Detail view.

Item Description. This is the item description from the ERP system or other data source.

Site. Site ID is from the ERP database. Only sites associated with suppliers in the VMI working data set are visible.

Note Clicking the site ID link displays the Site Detail view.

UM. The unit of measure for quantities is from the purchase order line.

Reference Number. This is the reference number of the scheduled receipt. Schedule detail records are uniquely identified with the combination of Date, Time, and Reference number.

Reference. This is the bin, roll, lot, or pallet number.

Quantity. This is the quantity the supplier is planning to ship.

Note If this is a link, clicking the quantity link displays the Shipping Forecast Detail view.

Ship Date. This is the date the supplier is expected to ship. It is an approximation based on delivery date and the transportation lead time.

Delivery Date. The customer requires delivery on this date.

Cum Quantity Shipped. The is sum of quantities from previous forecast entries and the current Quantity that is shipped.

Prior Cum Date. The ending date of the period summed to produce the prior cumulative quantity.

Prior CUM Qty. This is the total of previous requests for shipments—schedule releases—up to and including PriorCumDate.

Ship-to Address Detail

Organization. The customer that owns the supermarket site.

Note Clicking this link opens the Customer Detail view.

Ship To. The address code for the ship-to address is from the ERP database.

Ship-to names attached to new receipts in the ERP system are updated in QAD Supplier Portal as frequently as every five minutes. All ship-to names are updated no more than once per hour in the general working data set update from the ERP system.

Note When this field is a link, clicking the link displays the Ship-to Address Detail view.

Address. The street address for the facility where the site is located.

Web Address. The Internet URL for contacting the customer.

Site Address Detail

Organization. The customer associated with this supplier account in QAD Supplier Portal.

Note Clicking this link opens the Customer Detail view.

Site. The name, number, or ID code for the site of the supermarket that consumes kanban items for this loop.

Address. The street address for the supplier.

Web Address. The Internet URL for contacting a supplier or process owner.

Contact Information. The contact information defined in QAD Supplier Portal for this supplier.

Supplier Address Detail

Line Graph Icon.  Click the line graph icon to display the supplier inventory graph.

Bar Graph Icon.  Click the bar graph icon to display the supplier compliance graph.

Organization. The customer associated with this supplier account in QAD Supplier Portal.

Note Clicking this link opens the Customer Detail view.

Supplier ID. This supplier business ID is loaded from the ERP system or other data source.

Address. The street address for the supplier.

Web Address. The Internet URL for contacting a supplier or process owner.

DUNS Number. The unique nine-digit data universal numbering system (DUNS) number with a four-digit suffix identifying a specific location within your company; for example, a distribution center or a store. DUNS numbers are issued by Dun & Bradstreet to North American businesses and act as a unique identifier for electronic data interchange (EDI) and global electronic commerce transactions.

Only standard customer, consolidated customer, and consolidated supplier accounts can modify their DUNS number through company maintenance. Any modification to the regular supplier account DUNS number has to be made by the customer in their system of records. The DUNS number is not validated in QAD Supplier Portal.

Contact Information. The contact information defined in QAD Supplier Portal for this supplier.

Item and Supplier Inventory Graphs

 In Inventory » Min/Max, click the line graph icon on any line to display the inventory graph for that item-site. For the supplier graphs, click the supplier ID in Inventory » Min/Max to display Supplier Address Detail; then, click the line graph icon on the Organization line.

Since the data for the graph is sampled only once a day, the graph does not necessarily show the latest values.

Click Export to display the Inventory Report screen. Enter the title, file name, format, and page orientation; then, click Run to create the report. For details, see “Data Reports for Graphs”.

Item Inventory Graph

The display includes the following data for the selected item-site:

- Quantity On Hand
- Minimum Quantity Threshold
- Maximum Quantity Threshold
- Order Point Quantity Threshold

The Y-axis is the unit of measure shown on the Min/Max view. The X-axis shows the dates that the graph covers; the time period is dependent on the length of history stored in the QAD Supplier Portal database.

Supplier Inventory Graph

The display includes the following data for the chosen supplier:

- Cost of Supplier Quantity On Hand
- Cost of Minimum Quantity Threshold
- Cost of Maximum Quantity Threshold
- Cost of Order Point Quantity Threshold

The Y axis shows the total current cost of the supplier's inventory in the customer's currency. Only item-sites that are selected in the working data set are included in this graph.

Supply Source Detail

Address. The address information for the process site, the supplier, or the site of the supermarket that supplies the inventory.

Web Address. The Internet URL for contacting a supplier or process owner.

General Tasks

This section discusses the following topics:

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Alerts and Notifications

Alerts subscribers can use alerts and notifications to monitor data for critical inventory events—such as when inventory falls below the order point—and to inform selected recipients of those events so that they can take appropriate action.

Alerts can be viewed and maintained by only the subscriber that defined them. Subscribers can receive notifications from alerts defined by any subscriber.

In QAD Supplier Portal, alerts have the following components:

Target Data Type. The type of data, such as kanban loops, determines which events can be monitored.

Events. Alerts monitor for events such as inventory falling below the order point or below safety stock.

Target Data Lines. Alerts monitor a specified set of data lines from a view, such as kanban loops from the Board view, for the event of interest. A data line can be monitored simultaneously by different alerts for different events.

Recipients. Alerts notify specified alerts subscribers that an event has occurred.

Tabs

- Alert Tab
- Search Tab

Tasks

- Defining Alerts
- Updating Alerts
- Acknowledging Notifications
- Viewing Alerts

Reference

- Icons
- Simple and Aggregated Notifications
- Triggering Notifications

Tabs, Subtabs, and Fields

Alert Tab

Definition Subtab

Alert Name. This name displays on the Search tab.

Supplier/Customer. A list of one of the following (depending on the type of organization):

- Suppliers for regular customer
- Suppliers of all the linked organizations for a consolidated customer
- Customer for a regular supplier
- Customers of all the linked organizations for a consolidated supplier

The Supplier/Customer list is limited to those associated with items in the VMI working data set or loops in the kanban working data set.

The default name is None. For existing alerts the Supplier/Customer is also None; it can be modified only if all the target data is unlinked for an alert.

Recipients. The Available list box displays the alerts subscribers eligible to receive notifications of alert events. Highlight names in the Available list and use the arrow buttons to move the highlighted names to the Selected list box.

QAD Supplier Portal notifies alerts subscribers in the Selected list box of alert events according to the contact information—phone, fax, and so on—as defined in User Maintenance.

Alert Enabled. A check mark in the box enables the alert. Once there are target data lines attached to the alert definition, the alert can be enabled or disabled with this check box.

Alert Events. Each named alert has an associated event. The event you select here triggers the alert. Events are specific to the target data type. For example, the events available for kanban loops are different from the events available to other types of data. The target data types with alert events include ASNs, Schedules, Orders, Inventory - MinMax, Kanban Board, and Kanban Loop. Alert events for ASNs include:

- Aggregate ASN Shipped
- ASN Canceled
- ASN Received
- ASN Shipped

Alert events for Schedules include:

- Aggregate New Schedule Release By Supplier
- Supplier Schedule Detail Change
- Supplier Schedule Detail Delivery Date Past Due
- Supplier Schedule Detail Ship Date Past Due
- Supplier Schedule Order Line Change

Alert events for Orders include:

- New Purchase Order Header
- New Purchase Order Line
- Purchase Order Header Status Change
- Purchase Order Line Status Change
- Purchase Order Revision Change

Alert events for Inventory - MinMax include:

- Average demand out of tolerance
- QOH At or Above Maximum

- QOH At or Below Minimum
- QOH At or Below Order Point

Alert events for Kanban Board and Kanban Loop include:

- Kanban Loop Change
- Kanban On Hold
- Kanban Released From Hold
- Loop At or Below Order Point
- Loop At or Below Order Point (Every Time)
- Loop At or Below Safety Stock
- Loop At or Below Safety Stock (Every Time)

Note When the alert event is *Loop At or Below Safety Stock*, *Loop At or Below Safety Stock (Every Time)*, *Loop At or Below Order Point*, or *Loop At or Below Order Point (Every Time)*, QAD Supplier Portal sends the alert notification when the last kanban outside of the safety stock or the order point is consumed. When the alert event is *Loop At or Below Safety Stock (Every Time)* or *Loop At or Below Order Point (Every Time)*, QAD Supplier Portal sends the alert notification when Quantity is decreased, if the new Quantity is at or below the safety stock or order point level.

Duration. Duration—in decimal hours—specifies how long the event must persist to trigger an event notification. The duration parameter applies to these events:

- Loop At or Below Safety Stock
- Loop At or Below Order Point
- QOH At or Above Maximum
- QOH At or Below Order Point
- QOH At or Below Minimum
- Kanban on Hold

Alert events for Supplier Quality Performance include:

- Final Score Report Alert - which alerts the selected supplier(s) to their final SQP metrics score for the past period.
- Continued Failed Score Alert - which alerts the selected supplier(s) that a failed SQP metric score in the past period continues in the current period.

Target Data Subtab

This subtab displays the selected data lines that are associated with the defined alert. For example, for the Kanban Board and Kanban Loop views, each data line represents a loop.

Alert Name. This field displays defined alert parameters.

Alert Event. This field displays defined alert parameters.

Alert Enabled. This field displays defined alert parameters.

Supplier. This field displays defined alert parameters.

Search Tab

Data. Records displayed as specified on the Filter and Display subtabs.

Filter. Use the Filter subtab to specify the search criteria for selecting which records to include in the Data subtab display.

Display. Use the Display subtab to specify which columns to include in the Data subtab display.

Alerts Maintenance Tasks

Defining Alerts

For details about the subtabs and fields on the various pages, see the Alert Tab table.

- 1 Use one of the following methods to open Alerts Maintenance to the Search tab: Click the alert bell icon in one of the views to display alerts defined for that data line.
 - Click the Alerts tab in one of the views to display all alerts defined for the type of data in that view.
 - Go to Admin » Alerts to display all defined alerts.
- 2 If the Add Alert for... list box is present, select the type of data for the new alert.
- 3 Click New Alert to go to the Alert tab.
- 4 On the Definition subtab, complete the fields according to the details in the Alert Tab table.
- 5 Click Test Message to test the notification of the selected recipients. If no alert e-mail address is defined for a selected recipient in User Maintenance, QAD Supplier Portal displays a message stating which recipients did not receive a test message.
- 6 Click Save.
- 7 Go to the Target Data subtab.
- 8 Click Add to display the Select Target Data dialog. The target data displayed is restricted by the selected supplier/customer in the Definition subtab.
- 9 Select data lines to be monitored for this alert event.
 - a Use the Filter tab to specify the records to display on the Data tab.
 - b Use the mouse and the Select All and Unselect All buttons to place or remove checks in the left-column check boxes.
 - c Click Save to add the selected—checked—data lines to the alert definition and return to the Target Data subtab.
- 10 Use the Select All, Unselect All, and Delete buttons to further refine the selected target data.
- 11 Go to the Definition subtab.
- 12 Clear the Alert Enabled check box.
- 13 Click Test Message to send a test message for the new alert to each of the selected recipients.

- 14 Verify with the selected recipients that they received the test message.
- 15 Click the Alert Enabled check box to enable the new named alert; then click Save.

Updating Named Alerts

- 1 Use one of the following methods to open Alerts Maintenance to the Search tab: Click the alert bell icon in one of the views to display alerts defined for that data line.
 - Click the Alerts tab in one of the views to display all alerts defined for the type of data in that view.
 - Go to Admin » Alerts to display all defined alerts.
- 2 Use the Filter and Display subtabs to refine the displayed list of named alerts.
- 3 Click the name of the desired alert to open the Alert tab.
- 4 On the Definition subtab, update the fields according to the details in the Alert Tab table.
- 5 Click Save.
- 6 Go to the Target Data subtab.
- 7 Update the data included in the alert using the Add, Delete, Select All, and Unselect All buttons.
- 8 Click Save to update the selected data lines for the alert definition and return to the Target Data subtab.

Acknowledging Alerts Notifications

- 1 Go to the view that displays the target data type of interest.
- 2 Click the envelope icon in a target data line to open the Alerts Notification dialog.
- 3 Review the creation date, event, and message for each notification.
- 4 Acknowledge a selected set or all of the notifications:
 - Selected: Click the mouse in the check box for each notification to acknowledge, then click Acknowledge Selected. The notification icon remains on the data line.
 - All: Click Acknowledge All; this clears the notification icon from the data line.

Viewing Alerts

There are three ways to view alerts. In each case, the alerts are only visible to the person that defined them:

- All alerts. Go to Admin » Alerts to view the alerts you have defined for all target data types.
- By target data type. In the various views, click the Alerts tab to view the alerts you have defined for the target data type associated with that view. For example, the Alerts tab in the Board view displays alerts defined for kanban loops.
- By target data line. In the various views, click the bell icon in a data line to view all of the alerts you have defined for that line.

Alerts and Notifications Reference

Alerts Icons

There are two alerts-associated icons displayed in views:

Alert bell icon  . The bell icon in a data line indicates that the data line is monitored as a target data line in at least one user-defined alert.

Alert notification icon  . The envelope icon in a data line indicates that alert notifications have been sent regarding that target data line.

For those alert events that are aimed at the customer organization rather than an individual customer or supplier, the bell icon for an alert event is not displayed because it would apply to all data lines for the customer organization.

- New VMI working data set selections
- New kanban working data set selections
- Average demand out of tolerance

Simple and Aggregated Alerts Notifications

When the event in a defined alert occurs, QAD Supplier Portal sends notification of the event to each of the recipients specified in the alert definition. QAD Supplier Portal uses the contact modes defined in User Maintenance for each recipient. QAD Supplier Portal also displays the notification icon on the target data line for each of the recipients.

Clicking the icon opens the Alert Notifications dialog. The dialog displays a description of each unacknowledged alert notification generated for that data line and sent to the current user. The notification icon remains visible on the data line until the recipient acknowledges all notifications for that line.

For some alert events, the alerts system generates a single e-mail notification covering multiple events:

- New VMI working data set selections and new kanban working data set selections:
When multiple item-site-suppliers or kanban loops are loaded as new VMI working data set selections, for non-consolidated customers, the alerts system generates a single e-mail notification containing information regarding all of the new selections. The envelope notification icon displays for each new item-site-supplier.
- Aggregate new schedule release by supplier
When multiple new schedule releases are loaded into QAD Supplier Portal, the alerts system aggregates notifications into e-mail messages by supplier. Each recipient receives one e-mail with the aggregated notifications for all of its new schedule releases. In the views, the envelope notification icon displays for each new schedule release data line.

Triggering Notifications

Note that alerts are not triggered by current conditions, such as inventory being below minimum, but on the transitions to conditions, such as when inventory goes from above minimum to below minimum.

For example, you create an alert on a condition that currently exists (an inventory item is below its minimum) but the alert does not send notifications. The expected alert notification only occurs once the inventory transitions out of the expected alert state and then back in (the inventory going above minimum and then back under).

The following alerts are triggered only when data is loaded through the poller. Data modifications made in the relevant maintenance screens do not generate alert notifications:

- New VMI working data set selections
- New kanban working data set selections
- Average demand out of tolerance

Company Maintenance

Customers use Admin » Company » Company Maintenance to maintain the company address information, business ID, and company policies, and to upload a logo image.

Suppliers use this screen to review their address information, enter a business ID, and upload a logo image.

Security Group Availability. This menu item is available to only customer admin and supplier admin users.

Company Tab, Subtabs, and Fields

Customers have access to all of these subtabs and fields. Suppliers have access to the Business ID and Image fields on the Company subtab; they can also review information on the Address subtab.

Company

Company Name. For customer companies, the company name defaults from the subscription form. For supplier companies, it defaults from the data source.

For the Security tab to display, the following mandatory fields must be entered here:

- Company Name

Also, the address (at least the first line) and zip code must be entered on the Address subtab.

Business ID. The business ID is any identifying number such as a tax ID number; it defaults from the data source.

DUNS Number. The unique nine-digit data universal numbering system (DUNS) number with a four-digit suffix identifying a specific location within your company; for example, a distribution center or a store. DUNS numbers are issued by Dun & Bradstreet to North American businesses and act as a unique identifier for electronic data interchange (EDI) and global electronic commerce transactions.

Only standard customer, consolidated customer, and consolidated supplier accounts can modify their DUNS number through company maintenance. Any modification to the regular supplier account DUNS number has to be made by the customer in their system of records. The DUNS number is not validated in QAD Supplier Portal.

Domain. If a value is entered in this field—creating an QAD Supplier Portal domain, the poller checks that it matches the active domain for the target MFG/PRO database. If the target MFG/PRO database does not have an active domain, the poller displays a warning and continues processing, ignoring the QAD Supplier Portal domain. If no value is entered here, the target MFG/PRO database cannot have an active domain.

Processing terminates with a displayed error when there is a non-domain QAD Supplier Portal account and a domain MFG/PRO database. Processing also terminates if the MFG/PRO domain is inactive.

For a domain QAD Supplier Portal account and a non-domain MFG/PRO database, the poller displays a warning and then continues processing as for a non-domain QAD Supplier Portal account (the specified domain is ignored).

The Domain field is read-only once a value for a QAD Supplier Portal domain has been entered, saved, and loaded into QAD Supplier Portal.

Company Size. Select the size of the company from this drop-down menu. Options include 1-100 Employees, 101-1000 Employees, 1001-5000 Employees, 5001-10000 Employees, and More than 10000 Employees.

Revenue. Select the company annual revenue from this drop-down menu. Options include No Revenue, \$1-250,000,000, \$250,000,001-500,000,000, \$500,000,001-1,000,000,000, and More than \$1,000,000,000.

Product Capabilities. Select the industry sub-segment from this drop-down menu. The options displayed are dependent on the industry classification entered when creating the account for this company.

Image. The logo image displays with the company name in the views and screens.

Address

Address, City, State, Postal Code, Country, Country Code, Region, Web Address. For customer companies, the address information defaults from the subscription form. For supplier companies, it defaults from the data source. Customers can update address information.

The country selected from the Country menu determines the contents of the Country Code and Region fields.

For the Security tab to display, the following mandatory fields must be entered here:

- Address (at least the first line)
- Postal Code

Also, Company Name must be entered on the Company subtab.

Policies

Item Display. Supplier Portal displays an item according to the non-default value in this field in Admin » Company » Item Maintenance.

- Min/Max focuses on the inventory status of an item relative to the requirements for quantity on hand specified in Item Maintenance.
- Time Phased focuses on how demand and supply, such as schedules and ASNs, affect inventory status over time.

If the value is Default in Item Maintenance, Supplier Portal displays the item according to the non-Default value in this field in Supplier Maintenance.

If the value is Default in both Item Maintenance and Supplier Maintenance, Supplier Portal displays the item according to this field value in Customer Maintenance, where Default is not an option.

ASN Ship-to Validation Policy. Specifies whether ASN header and line ship-to data must match.

QAD Supplier Portal uses the default policy set in Admin » Company » Company Maintenance unless an alternate policy is specified for a supplier in Admin » Company » Supplier Maintenance.

Activate New VMI Items in WDS. Specifies whether new items brought into Supplier Portal through the bulk load process should automatically be selected as members of the working data set. Default is No.

Note For accurate data maintenance, an item can belong to only one WDS and all items that are loaded by the kanban poller are always added to the kanban WDS. If both the VMI and kanban pollers are in use and this VMI policy is enabled, any items that are loaded by both pollers will be assigned to the kanban WDS since it has precedence.

Export ASN Policy. Specifies whether ASNs should be exported from QAD Supplier Portal for import into the ERP system. Select Export QAD Supplier Portal-Entered ASNs to export only those ASNs that have been created manually or imported using ASNs » Import by the supplier in QAD Supplier Portal. Select Export All ASNs to export all ASNs, including those ASNs that have been imported by the poller, those that have been created manually by supplier in QAD Supplier Portal, and those that have been imported using ASNs » Import by the supplier in QAD Supplier Portal. (Note that you would only want to select this option if you are using a poller to load ASNs from a system that is not the ERP system but rather an EDI server or some other system implemented by the supplier.) Select Do Not Export ASNs to not export any ASNs. QAD Supplier Portal uses the default policy set in Admin » Company » Company Maintenance unless an alternate policy is specified for a supplier in Admin » Company » Supplier Maintenance.

QAD Supplier Portal uses the default policy set in Admin » Company » Company Maintenance unless an alternate policy is specified for a supplier in Admin » Company » Supplier Maintenance.

SNF. Set the policy for SNF file output to Standard SNF (the default) or Standard with Container Data.

Canceled ASN Export Policy. Specifies whether canceled ASNs should be exported in SNF or not.

Received ASNs History Days. Specifies the number of days (0, 15, 30, 60, or 180) for which closed ASNs are exported from QAD Supplier Portal. If set to 0, no closed ASNs are exported.

PO Retention Policy. Specifies whether QAD Supplier Portal should remove POs from the QAD Supplier Portal database if their status in the ERP database changes from open to something else.

If the removal policy is not in place, there are circumstances where the QAD Supplier Portal database is not updated and erroneously displays POs as open; for example:

- When an open PO is deleted rather than closed or canceled in the ERP database

- When the status of a PO is changed to closed/canceled and the PO had no receipt activity in the previous two weeks

PO Acknowledge Policy. A PO Acknowledgment document is an electronic data interchange (EDI) document the supplier sends to the customer to acknowledge a new PO or a revision to an existing PO. The PO Ack Policy setting specifies whether a supplier can edit the PO acknowledgment status once the PO Acknowledgment has been sent. As a customer, if you do not want the supplier to be able to change the status after the PO Acknowledgment has been sent, set PO Acknowledge Policy to Lock Acknowledgment. If you do want the supplier to be able to change the status after the PO Acknowledgment has been sent, set PO Acknowledge Policy to Do Not Lock Acknowledgment.

PO Reset Acknowledge Policy. A PO Acknowledgment document can specify a revision to an existing PO. As a customer, you might want a supplier to acknowledge each new revision to a PO. You can have QAD Supplier Portal reset the order acknowledgment status to Pending on a PO that has been revised in MFG/PRO, which will require the supplier to acknowledge the PO revision. To have QAD Supplier Portal reset the order acknowledgment status on a revised PO, set PO Reset Acknowledge Policy to Reset Acknowledgment On New Revision. (To have QAD Supplier Portal not reset the order acknowledgment status on a revised PO, set PO Reset Acknowledge Policy to Do Not Reset Acknowledgment.

Closed POs Display Policy. Select Display Closed POs to display closed POs in the Orders view.

Select Do Not Display Closed POs to hide closed POs in the Orders view.

Supplier Performance Export Policy. Specifies whether the supplier performance CIM file should be exported from QAD Supplier Portal. QAD Supplier Portal uses the default policy set in Admin » Company » Company Maintenance unless an alternate policy is specified for a supplier in Admin » Company » Supplier Maintenance.

Demand Template. Specifies the default template to use for items for this company. The template specifies the number of actual history days and the number of forecast days to use in calculating the average demand. A template can be attached to any number of item-sites. Define templates in Admin » Company » Demand Calculation Template.

Min/Max Calculation Policy. Select a default calculation method for min/max quantities for the company:

- Enable min/max quantity calculations. This disables manual data entry in the Minimum Quantity and Maximum Quantity fields.

Minimum = Average Demand * Safety Stock Days (from MFG/PRO)

Maximum = Average Demand * (Fixed Ordering Interval + Order Lead Time + Replenishment Time + Order Quantity Days + Safety Stock Days)

- Disable calculations, use manual entries.

Order Point Calculation Policy. Select a default calculation method for order point quantities for the company:

- Enable order point quantity calculations. This disables the Order Point Quantity field for manual entry.

Order Point = Minimum + (Delivery Lead Time * Average Demand) + (Order Lead Time * Average Demand)

- Disable calculations, use manual entry.

Invoice Visibility Policy. Specifies whether to enable or disable invoice visibility for the company. If disabled, the policy for all the suppliers to the company will be taken as disabled and the actual value that has been set for each of the suppliers will be ignored. If enabled, the policy for all the suppliers to the company will be considered. The visibility policy settings for each of the suppliers will be extracted from the ERP system when the policy has been enabled for the company. The poller server will pass the information about the invoice visibility policy for each supplier to the poller client. Only the administrative (Admin) user can view and change this field.

Invoices History Days. Specifies the number of days an invoice will be listed by QAD Supplier Portal after the check for the invoice is printed. Only the administrative user can view and change this field.

Receipts and Draft Invoices History Days. Specifies the number of days prior to the current date receipts data and draft invoices will be listed by QAD Supplier Portal. Only the administrative user can view and change this field.

Supplier Create Draft Invoice Policy. Specifies whether the Draft Invoices feature is available for customer users. If set to Allow Supplier to Create Draft Invoice, the feature can be controlled at the individual supplier level.

Tax Info Loading Policy. Specifies whether tax-related information is loaded into QAD Supplier Portal for POs and receipts. The feature can only be controlled at the company level.

BOM Report Functionality. Specifies whether to enable or disable the BOM report functionality policy for the company. If disabled, the policy for all the suppliers to the company will be taken as disabled and the actual value that has been set for each of the suppliers will be ignored. If enabled, the policy for all the suppliers to the company will be considered. The policy settings for each of the suppliers will be extracted from the ERP system when the policy has been enabled for the company. The poller server will pass the information about the BOM report functionality policy for each supplier to the poller client. Only the administrative (Admin) user can view and change this field.

Use Document Request. Specifies whether the company will accept document requests from suppliers. If set to Do Not Allow Document Request, the company will not accept document requests from suppliers. If set to Allow Document Request, the company will accept document requests from suppliers. Only the administrative (Admin) user can view and change this field.

Memo Items Policy. Specifies the memo items policy for the company. If set to Do not upload memo items (the default), the poller does not upload memo items to QAD Supplier Portal. If set to Upload memo items, the poller uploads memo items to QAD Supplier Portal.

Transport Labels Policy. Specifies the transport labels policy for the company. If set to Allow transport labels, the company allows its suppliers to create and print transport labels. If set to Do not allow transport labels, the company does not allow its suppliers to create and print transport labels.

QAD TMS Policy. Specifies the QAD Transport Management System (TMS) policy for the company. QAD TMS is available if you have purchased this option. You can either allow track and trace or not allow track and trace. As the company Admin user, by allowing track and trace you enable access to QAD TMS.

Match ASN Policy. Specifies whether to validate ASNs that do not properly match receipts. Mismatching could occur because of user entry errors or delivery issues. Select Validate ASN Receipts to identify ASN mismatches for receipts loaded into QAD Supplier Portal that do not have a Shipper ID or have a Shipper ID that does not match an open ASN. QAD Supplier Portal reports ASN mismatch data in the ASN View's Mismatch Type, Possible Receipt Date, Possible Receiver Line, Possible Receiver Number, and Received Qty fields. Select Match ASN Receipts (the default), to match without validation. In this case, QAD Supplier Portal closes an open ASN only when the Shipper ID of a receipt line matches the open ASN.

Supplier Auto Download Policy. Specifies the auto download policy for the supplier. This downloading function automatically exports new and net changes to Schedules and POs from QAD Supplier Portal. Enabling Auto Download displays the Supplier Auto Download Configurations option on the Supplier tab. The default value is Auto Download not allowed. See “Auto Download Installation” for information on installing Auto Download.

Customer Auto Download Policy.

Note Auto download for customers must be enabled through an EDI services engagement. It is not available without this services engagement.

Specifies the auto download policy for the company. This downloading function automatically exports new and net changes to Schedules and POs from QAD Supplier Portal. Enabling Auto Download displays the Customer Auto Download Configurations option on the Company tab. The default value is Auto Download not allowed.

See “Auto Download Installation” for information on installing Auto Download.

Supplier Quality Performance Policy. Use the Supplier Quality Performance (SQP) function to monitor and compare the performance of suppliers against key metrics for a specified period. Select Allow Supplier Quality Performance to enable SQP monitoring. See “Supplier Quality Performance View” on page 96.

Select Do Not Allow Supplier Quality Performance to disable SQP monitoring.

SQP Metric Start Month Of Year. Select the first month of the year for SQP monitoring. Typically, this is the beginning of the fiscal year, although any month can be selected.

SQP Metric Period. Select the period covered by SQP report. The options are Month, Quarter, Six Month, and Year.

Recalculate Ship Date Policy. Specifies if the Ship Date field imported from the ERP system should be recalculated on Schedules view based on the associated Transportation Days field. The default setting is for recalculation to be enabled. If recalculation is disabled, the Ship Date field is not recalculated.

Messaging Attributes Selection Policy. Specifies if only the customer or if both the customer and its suppliers can modify messaging attributes. The default setting is Allow customer only to select. If set to Allow customers and Suppliers to select, then the suppliers for this customer can set messaging attributes.

RFQ Policy. Specifies if the RFQ functionality is enabled. Select Allow RFQ to enable RFQ (Request for Quote) functionality. This activates the RFQ tab in QAD Supplier Portal and allows RFQ data to be imported into QAD Supplier Portal from QAD Enterprise Asset Management (EAM).

Default value is Not Allow RFQ.

Note You must have QAD EAM 12.1 or greater and the RFQ Poller installed for RFQ functionality to work. Contact your QAD support representative for more details.

RFQ Notification Policy. Specifies to whom notifications of RFQ status changes are to be sent. Select Only send Notification to RFQ Suppliers to send RFQ notifications to suppliers associated with an RFQ. Select Notification to Both Customer and Supplier to send RFQ notifications to the customer, as well as the suppliers associated with an RFQ. Select Do not send Notification to disable RFQ notifications entirely.

The default value is Only send Notification to RFQ Suppliers.

Kanban Partial Ship/Receipt Policy. Select Allow Partial Kanban to allow partial kanban shipments and receipts.

Select Do Not Allow Partial Kanban to prevent partial kanban shipments and receipts.

Attachment Home Server URL. Specify the home server URL for invoice attachments.

ASN Qty Tolerance Policy. ASN Quantity Tolerance enables customer administrators to set minimum and maximum quantities for ASN lines and prevents quantities outside that range from being saved when the ASN line is created.

Select Tolerance Limitation on ASN Quantity to enable a tolerance limitation for ASNs. This option enables the Min% and Max% fields.

Select No Tolerance Limitation on ASN Quantity to disable a tolerance limitation for ASNs.

Min%. Enter the minimum allowable quantity in percentage that a delivery shipment can contain and still be considered “in full.”

Max%. Enter the maximum allowable quantity in percentage that a delivery shipment can contain and still be considered “in full.”

Update Cum Receipt Qty Method. Specifies how the Cum Rcvd Qty value is determined -- from receipts or from schedules.

Cum Rcvd Qty is used to calculate the Arrears and Overshipments values displayed in Schedule Replenishment. The By Schedules (default) setting is recommended for most customers, especially those who use a QAD ERP application (MFG/PRO, Standard Edition, Enterprise Edition).

ASN Serial Number Policy. Use this field to control whether ASN serial numbers are generated at the customer level, or by individual supplier:

- Generate Serial Number at Supplier Level (the default). ASN serial numbers are generated independently for each supplier in a maximum 8-character sequence, using only numeric characters, rather than alphabetic characters. This means that different suppliers can have duplicate ASN serial numbers.
- Generate Serial Number at Customer Level. All of the suppliers for a customer share the same ASN serial numbering sequence, so the customer’s ASN serial numbers are unique across all its suppliers. When you choose this policy option, you can access Preferences settings to define rules to control the ASN serial number format. See “ASN Serial Number format” on page 155.

For reference, three number identifiers that apply to ASNs are:

- ASN Number. At ASN header level, the ID number of the ASN itself.
- Lot/Serial Number. At ASN detail level, the Lot/Serial of the item.

- **Serial Number.** Identifier at the ASN packages/pallet level (the number controlled by ASN Serial Number Policy).

Extract UDF and PO Ack Policy. Use this field to specify an option regarding the export of User-Defined Field (UDF) and PO acknowledgment information.

- Choose Extract UDF and PO Ack data from the drop-down list if you want to export UDF and PO acknowledgment updates. QAD Supplier Portal will then export the required data.
- Choose Do Not Extract UDF and PO Ack data from the drop-down list if you do not want to export UDF and PO acknowledgment updates.

Security

Data View. Specify the view to create user-labeled fields for: Min/Max, Orders, Schedules, Kanban Board. Each of these views can have up to 18 user-defined fields. For details, see the user-defined fields task.

Company Name. Indicates the company name.

Minimum Password Length. Specifies the minimum number of characters that will be allowed in a password. The default is zero (0). Zero indicates that there is no minimum password length. Note that the sum of the three following fields (Minimum Alphabetic Characters in Password, Minimum Numeric Characters in Password, and Minimum Non-Alphanumeric Characters in Password) must not be greater than the Minimum Password Length.

Minimum Alphabetic Characters in Password. Specifies the minimum number of alphabetical characters allowed in a password. The default is zero (0). Zero indicates that there is no minimum number of alphabetic characters.

Minimum Numeric Characters in Password. Specifies the minimum number of numeric characters allowed in a password. The default is zero (0). Zero indicates that there is no minimum number of numeric characters.

Minimum Non-Alphanumeric Characters in Password. Specifies the minimum number of non-alphanumeric characters allowed in a password. (Examples of non-alphanumeric characters include '!', '@', '#', and '\$'.) The default is zero (0). Zero indicates that there is no minimum number of non-alphanumeric characters.

Minimum Uppercase Characters in Password. Specifies the minimum number of uppercase characters allowed in a password. The default is zero (0). Zero indicates that there is no minimum number of uppercase characters.

Days Before Password Expiration. Specifies the number of days a password is valid before it must be changed. When a user attempts to log in and the user's password has expired, the system sends a notification email to the user stating that the password has expired and must be changed. The default is zero (0). Zero indicates that password changes are not required.

Days To Request Password Change Prior To Expiration. Specifies the number of days before the password expiration date that users are first reminded to change their passwords. During the specified number of days, the system sends a reminder email to a user each time the user logs in to the system. The default is zero (0). Zero indicates that warnings are not required. Note that this policy is only active if the value for the policy requiring changing passwords is greater than zero (0).

Lockout Duration in Minutes After Three Login Failures. Specifies how long in minutes a user account is automatically locked after three failed login attempts within 30 seconds. The default is zero (0). Zero indicates that the account will not be locked out. Changing the default setting for this field can help the system guard against attempts by hackers to crack passwords while also guarding against denial-of-service attacks. When the user account is locked, the system sends an alert email to the user and an alert email to the administrative user. The email states the user account name, the date and time the account was locked, and the reason (three login failures within 30 seconds). The administrative user can then take action to assist the user or investigate the possibility of an attempt to crack the user's password by a hacker. When a user is locked out, the system sets the Status field for the user (go to Admin » Company » User Maintenance, click on a User ID, and click the Security subtab) to Inactive. If the user has simply forgotten the password, instead of having the user wait for the lockout duration, the administrative user can change the Status field back to Active.

Auto Download Configuration

Note Auto Download Configuration options appear only if the Auto Download Policy has been enabled for this company or supplier. See “Auto Download Installation” for information on installing Auto Download.

Auto Download Interval. Specifies the interval at which auto downloading should occur: Daily, Weekly, Monthly (Start of Month), or Monthly (End of Month)

With Daily, a menu to specify the hour when the download should occur displays.

With Weekly, a menu to specify the day when the download should occur displays.

Timezone. Specifies the timezone for auto downloading. This will usually be your own timezone.

Draft Invoices

Invoice Amount Limit. For suppliers in countries that have government-specified limits on the size of individual supplier invoices, specify the maximum size of a single invoice. The system uses this value in determining how to split large invoices.

The default is 0, which means that the draft invoices splitting feature is not enabled.

This field can be used only by supplier admin users.

Preferences

Data. View Specify the view to create user-labeled fields for: Min/Max, Orders, Schedules, Kanban Board. Each of these views can have up to 18 user-defined fields. For details, see the user-defined fields task.

Company Name. Indicates the company name.

Print File Types. Specifies the print file types supported by the company's document management system as comma-separated file extensions. For example: pdf, doc, rtf, xml.

Model File Types. Specifies the model file types supported by the company's document management system as comma-separated file extensions. Note that you cannot have duplicate entries for Print File Types and Model File Types.

Explosion Depth. Specifies the maximum explosion depth for the hierarchical levels in a bill of materials. The Explosion Depth must be at least 1.

Administrator's E-mail. Specifies the administrator's email address. (This field should not be left blank.)

Data Source. Specifies an identifier for the company database.

Transport Labels. Specifies the available transport label types.

Selected Labels. Lists the selected transport label types.

Carriers. Lists the company's available transport carriers for use with QAD TMS, which supports logistics track and trace.

Selected Carriers. Lists the company's selected transport carriers for use with QAD TMS, which supports logistics track and trace.

Poller Data Delimiter. Specifies one or more characters as a delimiter for parsing poller data items in the ips.input file. If the Poller Data Delimiter is blank (the default), and comma characters (,) do not appear in items, the comma character is used as the default delimiter. If the Poller Data Delimiter is blank, and comma characters do appear in items, then the tilde character (~) is used as the default delimiter. If both the comma and tilde characters appear in items, then you must specify some other character that does not appear in the items as the delimiter or the items will not be loaded by the poller. For example, if the Poller Data Delimiter is blank, the item EX-~-Item-01 will not get loaded because it includes maintenance,~ as part of its data. In this case, you must specify a character in the Poller Data Delimiter field. For example, you might specify the star character (*) as the Poller Data Delimiter, assuming that character does not appear in any of the items. For instance, you must be sure that the delimiter specified in Poller Data Delimiter is not part of the Item ID, Supplier ID, or Site ID because the delimiter specified in the Poller Data Delimiter acts as the default delimiter in the ips.input file. (Applies only to Customer and Consolidated Customer users.)

Starting Label Serial. For ASN container label printing, identifies the starting serial number for label serial numbers.

Quantity Barcode Prefix. For ASN container label printing, identifies the data identifier prefix for the quantity bar code.

Container Barcode Prefix. For ASN container label printing, identifies the data identifier prefix for the container serial number bar code.

Pallet Barcode Prefix. For ASN container label printing, identifies the data identifier prefix for the pallet serial number bar code.

Draft Invoice Batch ID Prefix. Specify the prefix used in the numbering system for batch IDs for Draft Invoices.

Draft Invoice Batch ID - Length of Serial No. Specify the number of characters in the numeric portion of Draft Invoices batch IDs.

Note The total length of the two fields (Prefix and Serial Number) must not exceed eight characters.

ASN Serial Number format. Select one of these radio buttons:

- *Only allow numbers.* The ASN serial number can include only numeric characters 0 through 9.
- *Use numbers and characters.* The ASN serial number can include both numeric characters 0 through 9 and alphabetic characters A through Z.

Important The two ASN Serial Number fields are available only when ASN Serial Number Policy (on the Customer Maintenance Policies page) is Generate Serial Numbers at Customer Level. See “ASN Serial Number Policy” on page 152.

ASN Serial Number maximum allowed length. Specify the maximum number of characters (numbers and/or letters, depending on the previous field) that can be included in an ASN serial number.

The maximum possible serial number length is 50.

ASN Serial Number editable for suppliers. This field lets customers control whether their suppliers can manually change ASN serial numbers.

Note You can only select an option in this field if the ASN Serial Number Policy field in Admin » Company » Company Maintenance » Policies is set to Generate Serial Number at Customer Level.

The options for this field are Editable and Not editable.

- **Editable.** Select the Editable option to enable suppliers to manually edit ASN serial numbers.
- **Not Editable.** Select the Not Editable option to block suppliers from editing ASN serial numbers. Suppliers must then use the automated serial number generated by the system.

The default is that neither option is selected.

Important If no option has yet been selected in the ASN Serial Numbers editable for supplier field, no restrictions apply and suppliers can manually edit serial numbers.

User Labels

Data View. Specify the view to create user-labeled fields for: Min/Max, Orders, Schedules, Kanban Board. Each of these views can have up to 18 user-defined fields. For details, see the user-defined fields task.

CustText1-3. Labels for up to three user-defined text fields that are visible to customers only.

CustNumeric1-3. Labels for up to three user-defined numeric fields that are visible to customers only.

CustDate1-3. Labels for up to three user-defined date fields that are visible to customers only.

CustSupplierText1-3. Labels for up to three user-defined text fields that are visible to customers and suppliers.

CustSupplierNumeric1-3. Labels for up to three user-defined numeric fields that are visible to customers and suppliers.

CustSupplierDate1-3. Labels for up to three user-defined date fields that are visible to customers and suppliers.

System Monitoring

Receive a notification for each data synchronization completed successfully without validation errors. Select this field if you want the system to send a notification after each successful data load, including VMI and kanban loads. This notification option is available to customer administrators only.

Note The IT notification is only sent only to the email address specified under the System Monitoring menu option of users with the user ID that starts with poller. Other Supplier Portal users are not notified.

Receive a notification for each data synchronization completed successfully with validation errors. Select this field if you want the system to send a notification after each successful data load that had data logic errors, including VMI and kanban loads.

This notification option is available to customer administrators only.

Note The IT notification is only sent only to the email address specified under the System Monitoring menu option of users with the user ID that starts with poller. Other Supplier Portal users are not notified.

Receive a daily notification with all the data synchronizations performed during the previous day. Select this field if you want the system to send a notification listing all data synchronizations performed the previous day. This notification option is available to customer administrators only and is sent at midnight according to the server time. The Supplier Portal server uses US Eastern Standard Time.

Note The IT notification is only sent only to the email address specified under the System Monitoring menu option of users with the user ID that starts with poller. Other Supplier Portal users are not notified.

Receive a notification when the data synchronization. Select this field if you want the system to send a notification when data synchronization between ERP and Supplier Portal stops. This notification option is available both to customer administrators and to Supplier Portal support personnel. The notification is triggered when the portal stops. The Support Group email is pre-set in Supplier Portal.

Note The IT notification is only sent only to the email address specified under the System Monitoring menu option of users with the user ID that starts with poller. Other Supplier Portal users are not notified.

Company Maintenance Tasks

Maintain Company Information and Policies

- 1 Go to Admin » Company » Company Maintenance.
- 2 Go to the Company, Address, and Policy subtabs and enter data as required. For field details, see the Company Tab table.
- 3 Click Save on each page.

Upload Logo Image

Customer company logos are shown next to the customer company name for supplier users. Supplier company logos are shown next to the supplier name when a customer has filtered for that supplier on the Filter tab/subtab.

- 1 Go to Admin » Company » Company Maintenance.
- 2 Go to the Company subtab.
- 3 Click the Select Image button in the Image field.
- 4 Enter the name of the image file; then click Save.

Set Up User-Defined Fields

The labeled fields defined here are available for display, filtering, and data entry in the data view for which they are defined. Customer admin, consolidated customer admin, and consolidated supplier admin users can define field labels.

- 1 Go to the User Labels subtab in Admin » Company » Company Maintenance.
- 2 Select a data view. This specifies where the defined field labels will be available for display and data entry.
- 3 Go to each label field as required, and enter a field label.
- 4 Use the User Defined Data icon to open the maintenance screen for entering data values in user-defined fields for the selected item. See “User-Defined Fields” for details.

Enabling BOM Reports

QAD Supplier Portal supports BOM visibility, making available BOM reports based on bills of materials data extracted by the hourly load processes of the VMI and Kanban pollers. From the Item Detail view, a link to the new BOM Report page provides a report that can list BOM data for an item's component items, including the name and description of the component items, the level of the component items in the product structure, the unit of measure, quantity required per item, revision number, make/buy code, and other data. As a user, you can view the BOM report directly online using QAD Supplier Portal or have QAD Supplier Portal generate a PDF of the report for further use.

To Enable Company BOM Report Policy

- 1 Go to Admin » Company » Company Maintenance.
- 2 Go to the Policies subtab.
- 3 Set the BOM Report Functionality field to Enable BOM Report Functionality.
- 4 Click Save.

To Enable Supplier BOM Report Policy

Typically, a supplier should have the BOM report policy set to default, which sets the policy for the supplier to be the same as that of the company.

- 1 Go to Admin » Supplier » Supplier Maintenance.
- 2 Go to the Policies subtab.
- 3 Set the BOM Report Functionality field to Default.
- 4 Click Save.

Enabling PO Acknowledgment Policy

A PO Acknowledgment document is an electronic data interchange (EDI) document the supplier sends to the customer to acknowledge a new PO or a revision to an existing PO. The PO Acknowledgment Policy setting specifies whether a supplier can edit the PO acknowledgment status once the PO Acknowledgment has been sent.

A PO Acknowledgment document can specify a revision to an existing PO. As a customer, you might want a supplier to acknowledge each new revision to a PO. You can have QAD Supplier Portal reset the order acknowledgment status to Pending on a PO that has been revised in MFG/PRO, which will require the supplier to acknowledge the PO revision.

An export feature provides users with the ability to export PO acknowledgment information from QAD Supplier Portal to the Poller client. The Policies tab in Company Maintenance contains a policy to control the export feature for UDF and PO acknowledgment data. See “Policies” and see “Export User-Defined Fields and PO Acknowledgments”.

To Enable the Company PO Acknowledgment Policy

- 1 Go to Admin » Company » Company Maintenance.
- 2 Go to the Policies subtab.
- 3 Set the PO Acknowledge Policy field to Lock Acknowledgment if you do not want the supplier to be able to change the status after the PO Acknowledgment has been sent.
- 4 Click Save.

To Enable Supplier PO Acknowledgment Policy

Typically, a supplier should have the PO acknowledgment policy set to default, which sets the policy for the supplier to be the same as that of the company.

- 1 Go to Admin » Supplier » Supplier Maintenance.
- 2 Go to the Policies subtab.
- 3 Set the PO Acknowledge Policy field to Default.
- 4 Click Save.

To Enable Company PO Reset Acknowledgment Policy

- 1 Go to Admin » Company » Company Maintenance.
- 2 Go to the Policies subtab.
- 3 Set the PO Reset Acknowledge Policy field to Do Not Reset Acknowledgment if you do not want the supplier to be able to change the status after the PO Acknowledgment has been sent.
- 4 Click Save.

To Enable Supplier PO Reset Acknowledgment Policy

Typically, a supplier should have the PO reset acknowledgment policy set to default, which sets the policy for the supplier to be the same as that of the company.

- 1 Go to Admin » Supplier » Supplier Maintenance.
- 2 Go to the Policies subtab.
- 3 Set the PO Reset Acknowledge Policy field to Default.
- 4 Click Save.

To Reset PO Acknowledgments

If a supplier has made a mistake or the customer wants the supplier to revisit the PO, the customer (company) Admin user can reset the acknowledgments. To do so, a customer Admin user must do the following:

- 1 Go to Orders.
- 2 On the Orders page, in the Order column, click the order whose acknowledgments you want to reset.
- 3 On the Purchase Order Detail page, click the Reset Acknowledgments button.

Note The supplier Admin user cannot use the Reset Acknowledgments button. Only the customer Admin user can use the Reset Acknowledgments button.

Enabling Document Requests

QAD Supplier Portal can be integrated with a customer's document management system so that drawings, specifications, and other types of documents can be shared with suppliers, improving communication and collaboration. Customers can specify whether to enable QAD Supplier Portal to accept document requests from suppliers, set preferences for supported file types, model types, maximum explosion depth, and specify the source database of the document management system.

If document requests are allowed based on the policies of the customer and a given supplier, the supplier users can make document requests through QAD Supplier Portal's Item Detail view, entering the item number and item revision. (The Orders view — Display tab now includes an Item Revision column and the Purchase Order Line Detail now includes an Item Revision field.) When making a document request, the supplier user can specify whether to include reference documents and the latest commercial revisions, as well as specify the file type, explosion depth,

and the email address to which the document is to be sent. To assure the secure delivery of documents by email, the supplier user can have a security certificate ID set in the User Maintenance view and then the user can include a certificate with a particular document request. So that customer administrators can monitor document requests, QAD Supplier Portal lists the details of all document requests in a document request log.

To enable document requests, you must first edit the poller.properties file to specify the directory where the document requests will be stored. A document request can then be stored as an XML file in the document request directory. The customer must develop a mechanism to direct their document management system to provide the requested documents using the requests in the XML files in the document request directory. The document management system must identify the requested document and email the document to the supplier user's email address as provided in the request. Email security is based on the supplier user's security certificate, which must be specified as a security option for the user. Finally, you must enable the company and supplier document request policies, and set the company document request preferences.

To Add Document Request Directory to Poller Properties File

Using a text editor, edit the poller.properties file in the poller directory, adding a line for the document request directory definition in the following format: DOC_REQ_DIR=<document request directory> (example: DOC_REQ_DIR=./sv/doc_reqs). The poller.properties file must include the DOC_REQ_DIR definition so that the system can complete document requests.

Important: In the Cygwin UNIX environment, be sure to use the UNIX slash (/) rather than the DOS backslash (\) when specifying the document request directory.

To Enable Company Document Request Policy

- 1 Go to Admin » Company » Company Maintenance.
- 2 Go to the Policies subtab.
- 3 Set the Use Document Request field to Allow Document Request.
- 4 Click Save.

To Enable Supplier Document Request Policy

Typically, a supplier should have the document request policy set to default, which sets the policy for the supplier to be the same as that of the company.

- 1 Go to Admin » Supplier » Supplier Maintenance.
- 2 Go to the Policies subtab.
- 3 Set the Use Document Request field to Default.
- 4 Click Save.

To Set Company Document Request Preferences

- 1 Go to Admin » Company » Company Maintenance.
- 2 Go to the Preferences subtab.
- 3 Set the Print File Types, Model File Types, Explosion Depth, Administrator's E-mail, and Data Source fields.
- 4 Click Save.

To Set User Security Certificate

For each user making a document request, a security certificate ID must be set. The Document Request button will not display for a user if a security certificate ID has not been set for that user.

- 1 Go to Admin » Company » User Maintenance.
- 2 Click on a user ID.
- 3 Go to the Security subtab.
- 4 Enter the user's security certificate in the Security Certificate ID field.
- 5 Click Save.

Making Document Requests

Once document requests are enabled, a supplier user can make document requests by clicking on the Document Request button in an Item Detail view. The Document Request button is displayed only if the document request policies for the customer and the supplier are set to allow document requests and the security certificate for the supplier has been set.

Viewing Document Request Log

Administrators can view the document request log by going to Admin » Company » Document Request Log.

Enabling Memo Items

Memo items on purchase orders are typically setup items, instructions to suppliers, and maintenance, repair, and operations (MRO) items. Because such items are expensed, they are not usually tracked as inventory items. QAD Supplier Portal can now optionally upload items indicated as Memo on purchase orders, include these items in the working data set, and display these items in the Orders, Receipts, and Invoices views. The views can include the Type column that indicates whether an item is an inventory, sub-contract, blanket, or memo item.

To Enable Memo Items Policy

- 1 Go to Admin » Company » Company Maintenance.
- 2 Go to the Policies subtab.

- 3 Set the Memo Items Policy field to Upload memo items.
- 4 Click Save.

Enabling Transport Labels

Suppliers can create and print transport labels using a variety of transport label types. QAD Supplier Portal displays a label in PDF format and can print the label on the supplier's printer.

Customers can select which labels they want their suppliers to use. The Transport Labels feature can be turned on (or off) for particular suppliers.

To Enable and Select Transport Labels

Customers can enable the transport label policy and select which transport labels they want to use as follows:

- 1 Go to Admin » Company » Company Maintenance.
- 2 Go to the Policies subtab.
- 3 Set the Transport Label Policy field to Allow transport labels.
- 4 Go to the Preferences subtab.
- 5 From Transport Labels, select the label types you would like to have available. You can select more than one label type by holding the Ctrl key as you select label types.
- 6 Click Save.
- 7 Once saved, the selected label types are listed in Selected Labels.

To Enable and Select Transport Labels for Individual Suppliers

You can enable and select transport label printing for individual suppliers as follows:

- 1 Go to Admin » Company » Supplier Maintenance.
- 2 Click a Supplier ID link.
- 3 Go to the Preferences subtab for the supplier.
- 4 Transport Labels lists the available label types. By default, the label types available are the labels previously selected in Company Maintenance. Selected Labels lists the label types selected for this supplier. To change the selected label types, select the label types from Transport Labels. You can select more than one label type by holding the Ctrl key as you select label types.
- 5 Click Save.
- 6 Go to the Policies subtab for the supplier.

- 7 In the Transport Label Policy field, the supplier transport label policy is Default, which specifies that the supplier policy is the same as the company policy. Typically, you should use the Default setting. However, you can set the field to Allow transport labels (or Do not allow transport labels).
- 8 Click Save.

Now a supplier can log-in to QAD Supplier Portal and create transport labels.

Enabling Track and Trace with QAD TMS

To support logistics track and trace, QAD Supplier Portal includes a secure QAD Supplier Portal interface to the QAD Transportation Management System (QAD TMS), a shipping and trade management solution. QAD TMS manages shipment tracking issues by exception. Users can create shipping plans for each route between the suppliers and customers. They can enter estimated lead times, and notification lead times (estimated time for notification of the event occurring) for each event. The system uses alerts to manage events by exception. The alerts set up behind each event have a tolerance limit (deviation allowed before raising alert), priority, alert action, notification message, and other details. Access to QAD TMS through QAD Supplier Portal is limited to customers who have purchased the additional QAD TMS functionality.

To Add a Customer to QAD TMS

The QAD TMS administrator adds the customer's information to QAD TMS and assigns a unique TRAXClient identifier for the organization.

To Add a Customer to QAD Supplier Portal

Using the TRAXClient identifier, the QAD Supplier Portal administrator enables track and trace in QAD Supplier Portal with the QAD TMS policy.

To Enable QAD TMS Access

If you have access to QAD TMS, enable QAD Supplier Portal to use QAD TMS as follows:

- 1 Go to Admin » Customer » Customer Maintenance.
- 2 Go to the Policies subtab.
- 3 Set the QAD TMS Policy field to Allow Track and Trace.
- 4 Click Save.

To Select Carriers

After you have enabled QAD Supplier Portal to use QAD TMS, specify the carriers that are available.

- 1 Go to Admin » Customer » Customer Maintenance.
- 2 Go to the Preferences subtab.

- 3 From the list, select the carriers you want to use.
- 4 Click Save. The selected carriers are listed in the Selected Carriers field.

To Enable Track and Trace for Individual Suppliers

After enabling track and trace for the company, enable track and trace for each supplier:

- 1 Go to Admin » Company » Supplier Maintenance.
- 2 Click a Supplier ID link.
- 3 Go to the Policies subtab for the supplier.
- 4 Set the QAD TMS Policy field to Allow Track and Trace.
- 5 Click Save.
- 6 Go to the Preferences subtab for the supplier.
- 7 From the list, select the carriers you want the supplier to use.
- 8 Click Save. The selected carriers are listed in the Selected Carriers field.

Accessing QAD TMS

Once you have enabled access to QAD TMS, you can access it from the TMS pull-down menu on the QAD Supplier Portal top menu bar.

- Go to TMS » Shipping Alerts Portal to view the QAD TMS shipping alerts portal.
- Go to TMS » Master Shipping Plan to view the QAD TMS master shipping plan portal.
- Go to TMS » Rule Books » to view the QAD TMS rule books.
- Go to TMS » Rules » to view the QAD TMS rules.
- Go to TMS » Alert Subscription » to view the QAD TMS alert subscription.

The ASN view includes a track and trace icon () in the Status column for ASNs being tracked with QAD TMS. You can access QAD TMS by clicking on this icon to view a shipment event list generated by a QAD TMS shipment inquiry.

System Monitoring

System monitoring capabilities in Supplier Portal enable users to monitor the Supplier Portal service in a timely manner, and to easily detect system failures and data inconsistencies. This feature only applies to SCCS Loading.

The System Monitoring feature is available to two specific monitoring groups: customer administrators and Supplier Portal Support. Customers can receive notifications with information about poller loads according to user-defined rules. Customer administrators configure the types of notifications that the system must send and to which recipients. Other notifications are designed to help Supplier Portal Support personnel to understand any issues that occurred with the SCCS Loading service.

Setting Up System Monitoring Alerts

- 1 Configure system monitoring alerts for the user as described in “Setting Up System Monitoring for a User”.

When Step 1 is complete, use the following step to activate the types of notification the system must send.

- 2 In Admin » Company » Company Maintenance » System Monitoring, select the check box for the rules for which to send the notification emails. The options are:

- Receive a notification for each data synchronization completed successfully without validation errors.

This notification option is available to customers only and is triggered by each successful data load, including VMI and kanban loads.

- Receive a notification for each data synchronization completed successfully with validation errors.

This notification option is available to customers only and is triggered by each successful data load that had data logic errors, including VMI and kanban loads.

- Receive a daily notification with all the data synchronizations performed during the previous day.

This notification option is available to customers only and is sent at midnight according to the server time. The Supplier Portal server uses US Eastern Standard Time.

- Receive a notification when the data synchronization between ERP and Supplier Portal is stopped.

This notification option is available both to customers and to Supplier Portal Support personnel, and is triggered when the portal stops. The Support Group email is pre-set in Supplier Portal.

Two additional notifications are sent to Supplier Portal Support personnel only:

- No loads have been received in a certain amount of time. Detect that poller client is stopped.

This notification does not require any configuration and is triggered when no loads have been processed in a set time frame.

- A load takes longer than a defined amount of time.

This notification does not require any configuration and is triggered when a load takes longer than expected.

Maintaining Item Images

Use Admin » Item » Add Image to associate an image with an item.

Images are displayed in the item detail window.

- 1 Go to Admin » Item » Add Image.
- 2 Use the Search-Results frame to display items by ID or by site.
- 3 Select an item to display the existing image for that item.
- 4 Type or use the browse to enter a file path in Image.

- 5 Click Submit.

BOM Report

A BOM report provides a listing of component items in a product structure, along with details about each item.

QAD Supplier Portal can provide BOM reports based on bills of materials data extracted by the hourly load processes of the VMI and Kanban pollers. From the Item Detail view, a link to the new BOM Report page provides a report that can list BOM data for an item's component items, including the name and description of the component items, the level of the component items in the product structure, the unit of measure, quantity required per item, revision number, make/buy code, and other data. As a user, you can view the BOM report directly online using QAD Supplier Portal or have QAD Supplier Portal generate a PDF of the report for further use.

Creating Reports

You can create a PDF document of a BOM report by clicking on the PDF icon. To change the component level of the report, enter a new level number in the Level field and click Go.

Fields

PDF Icon. Click the PDF icon to generate a PDF document of the BOM report.

Organization. The name of the organization (customer).

Item ID. The item number, name, or code from the customer ERP system or other data source.

Date. The current date (in year-month-day format).

Level. Enter a component level number and click Go to view the BOM down to the entered level number.

User Maintenance

Use Admin » Company » User Maintenance to create and maintain user accounts, including contact information, passwords, and security group assignments.

Use Admin » Company » Contact Maintenance to maintain names, addresses, and contact details for contacts that are not QAD Supplier Portal users.

Tabs

- User Tab
- Search Tab

Tasks

- Create New User Accounts
- Maintain Existing User Accounts

- Configure System Monitoring
- Maintain the Poller Account Password and Time Zone

Reference

- Security Groups Reference

Tabs, Subtabs, and Fields

User Tab

Name

User ID, First Name, Middle Name, Last Name, Title, Time Zone. The User ID can include alphanumeric characters (a-z) and (0-9) and the following special characters:

` ~ ! @ # \$ % ^ & * () - _ = + [{ } \ | ; : ' " , < . > / ?

Note White space / blank is not allowed.

Customers must set a time zone for the poller account. It is required for the poller to process data.

For other users, if time zone is set, Supplier Portal displays it in the three-letter format when it is included with dates/times. Times entered for other time zones are adjusted to the user's time zone.

If time zone is not set for a user, Supplier Portal displays dates/times with the entered time zone if there is one.

Address

Address, City, County, Postal Code, Country Code, Web Address. When you create a supplier admin user, Supplier Portal automatically includes any known address information for the supplier in the address fields as a convenience. Of course, you can then edit the address information as necessary. The Country Code drop-down menu enables you to select a country for the user based on ERP country codes.

Contact Info

Work Phone, Home Phone, Mobile Phone, E-mail, Fax, Pager, SMS, Alert Email. For each contact mode—phone, fax, and so on—specify the appropriate information.

To ensure that no Alerts notifications are lost, have an e-mail address that is always accessible.

Security

Password for user name, New Password, Confirm New Password. In the first field, the field label shows the user name for the current account. You must enter the password for the current account to make any updates on this subtab. When changing the password, the password must meet the password security requirements as indicated in the Minimum Password Length, Minimum Alphabetic Characters in Password, Minimum Numeric Characters in Password,

Minimum Non-Alphanumeric Characters in Password, and Minimum Uppercase Characters in Password fields. The new password must also not be a previously used password. When a password is changed, the system sends an email to the user indicating the change.

New PIN Number, Confirm New PIN Number. PIN numbers are not currently used.

Note The Security tab will not be accessible if basic user information has not been entered on the Name (first name, last name, title), Address (first line of address, postal code), and Contact Info (at least one phone number and at least one email) tabs.

Security Certificate ID. Specifies the user's security certificate identifier (public key modulus and exponent). The security certificate identifies the user making a document request using the public key infrastructure X.509 format.

Status. Specifies whether the user account is Active or Inactive. Only administrative users can change this field. If an administrative user deactivates a user by setting Status to Inactive, the system sends an email to the user informing the user that the account has been deactivated. Note that when a user has made three failed login attempts within 30 seconds, the user's Status is automatically set to Inactive for a period of time set by the **Lockout Duration in Minutes After Three Login Failures** field on the Company Maintenance screen (go to Admin » Company » Company Maintenance, and click the Security subtab). However, an administrative user can set the Status back to Active at any time so that a user can login again before the end of the lockout duration.

Groups. Security groups govern access to the Web browser interface as well as Supplier Portal menu items and fields within the maintenance screens. For details, see the Security Groups reference.

Minimum Password Length. Indicates the minimum number of characters that will be allowed in a password. The default is zero (0). Zero indicates that there is no minimum password length.

Minimum Alphabetic Characters in Password. Indicates the minimum number of alphabetical characters allowed in a password. The default is zero (0). Zero indicates that there is no minimum number of alphabetic characters.

Minimum Numeric Characters in Password. Indicates the minimum number of numeric characters allowed in a password. The default is zero (0). Zero indicates that there is no minimum number of numeric characters.

Minimum Non-Alphanumeric Characters in Password. Indicates the minimum number of non-alphanumeric characters allowed in a password. (Examples of non-alphanumeric characters include '!', '@', '#', and '\$'.) The default is zero (0). Zero indicates that there is no minimum number of non-alphanumeric characters.

Minimum Uppercase Characters in Password. Indicates the minimum number of uppercase characters allowed in a password. The default is zero (0). Zero indicates that there is no minimum number of uppercase characters.

Preferences

Sort Preference. Specify whether to sort data views by one column only or by multiple columns simultaneously.

Auto Refresh. Select Enabled to have data in the Min/Max, Kanban Board, Orders, Schedules, ASNs, and Invoices views refreshed each 15 minutes with data changes highlighted. For details, see “Auto Refresh”.

View Preference. Select Scrolling View to enable scrolling the data table within the Supplier Portal window; the column labels and the row identifier information in the left column are always visible. Select Standard View to use the browser scroll bars. For details, see “Scrolling Data Views”.

CSV Delimiter. This single character delimits fields when importing/exporting CSV files; the default is comma (,).

When importing and exporting CSV files, it is best to have this value match the locale-specific delimiter for list separator that is defined in the Regional and Language options section of the system Control Panel. The other locale-specific characters such as decimal are also defined in the Control Panel.

Exporting. Under the following conditions, outgoing files such as reports can be saved but not opened from the File Download dialog:

- The delimiter specified in this field does not match the delimiter specified in the Regional and Language options section of the system Control Panel.
- The delimiter character is the same as the decimal character.

You can specify the appropriate field delimiter when opening such a saved file in a spreadsheet application.

Importing. When importing CSV files such as ASNs and shipping forecasts, QAD Supplier Portal uses the field delimiter specified in this field.

Note The Preferences tab will not be accessible if basic user information has not been entered on the Name, Address, and Contact Info tabs.

Message Notifications. Select a notification preference for collaboration message updates to the Alert Email account you specify in Contact Info. You can choose from the following:

- Do not have QAD Supplier Portal send notifications to your Alert Email account when messages are created or updated.
- Have QAD Supplier Portal send a notification to your Alert Email account whenever a message that is assigned to you or that you have edited is created or updated.
- Have QAD Supplier Portal send a notification to your Alert Email account whenever a message is created or updated.

System Monitoring

Note It is recommended that you activate system monitoring for the VMI Poller user account and for the Kanban Poller user account.

User ID. Displays the user ID.

Receive Monitoring Emails. Select Active to activate system monitoring notifications for the current user.

System monitoring capabilities in Supplier Portal enable users to monitor the Supplier Portal service in a timely manner, and to easily detect system failures and data inconsistencies. The notifications are sent to the email address specified in the Monitor Email Notification field.

Select Inactive if you do not want to activate system monitoring notifications for the current user.

Monitor Email Notification. Specify the email address to which the system must send system monitoring notifications for the current user.

Search Tab

Data. Records displayed as specified on the Filter and Display subtabs. Click the column labels to sort the data rows.

Filter. Use the Filter subtab to specify the search criteria for selecting which records to include in the Data subtab display.

Display. Use the Display subtab to specify which columns to include in the Data subtab display.

User Maintenance Tasks

Create New User Accounts

- 1 Go to Admin » Company » User Maintenance.
- 2 Go to User tab » Name subtab.
- 3 Click New, enter the user ID, user name, and title, then click Save.
- 4 Proceed to the other subtabs as shown in the User Tab table, enter values, and click Save.

Note For details on security groups, see the Security Groups reference.

Maintain Existing User Accounts

- 1 Go to Admin » Company » User Maintenance.
- 2 Use the Filter and Display subtabs as shown in the Search Tab table to refine the display on the Data subtab.
- 3 On the Data subtab, click a User ID link to open that record on the User tab.
- 4 Update the user record using the subtabs as shown in the User Tab table, then click Save.

Maintain the Poller Account Password and Time Zone

- 1 Go to Admin » Company » User Maintenance.
- 2 Use the Filter and Display subtabs as shown in the Search Tab table to refine the display on the Data subtab.
- 3 On the Data subtab, click the poller account name link to open that record on the User tab.
- 4 On the Name subtab, set the time zone for the poller, then click Save.

- 5 On the Security subtab:
 - a Type your password in the appropriate field.
 - b Type the new password for the poller account in the New Password and Confirm New Password fields.
 - c Click Save.
- 6 Use a text editor to update the password in poller.properties.

Setting Up System Monitoring for a User

- 1 In Admin » Company » User Maintenance, click on the account for the current user.
- 2 Choose the System Monitoring tab.
- 3 In the Receive Monitoring Emails field, select Active.
- 4 In the Monitor Email Notification field, specify the email address to which the system must send notification emails. Click Save.
- 5 Repeat Steps 1 to 4 for the VMI Poller user account and the Kanban Poller user account.
- 6 Complete further steps in Admin » Company » Company Maintenance to select the types of notifications you want the system to send. See “Setting Up System Monitoring Alerts”.

Security Groups Reference

Security groups govern access to the Web browser interface as well as QAD Supplier Portal menu items and fields within the maintenance screens.

User accounts in the admin and non-admin groups have access to QAD Supplier Portal through the Web browser interface; the poller and Web services groups do not.

Admin. Customer and supplier admin users have different privileges:

- Customer: These users have access to all QAD Supplier Portal menus, views, and maintenance screens. Customers define their admin user name and password during the subscription process. Customer admin users also define the initial supplier admin user name and password for each supplier.
- Supplier: Customer admin users define the initial supplier admin account user name and password for each supplier. Supplier admin users have access to the QAD Supplier Portal views and menus and to the Admin menu for company, user, and contact Maintenance. When you create a supplier admin user, QAD Supplier Portal automatically includes any known address information for the supplier in the address fields as a convenience. Of course, you can then edit the address information if necessary.

Master admin account records—customer, supplier, consolidated—cannot be deleted. A master admin account is a customer admin user created during subscription, a supplier admin user created by a customer, or a consolidated admin user created by either a customer or supplier.

Non-Admin. Non-admin users have access to the QAD Supplier Portal views and menus and to the Admin menu for Alerts and user maintenance only.

Web Services. User accounts assigned to the Web services security group access QAD Supplier Portal through an API. These user accounts are for external devices such as bar code readers that are set up to send transaction data to QAD Supplier Portal. The external device must send the user ID and password for the account in order to gain access to QAD Supplier Portal for uploading data. There is no access through the user interface.

Poller. Each poller that uploads data to QAD Supplier Portal has a user account assigned to the poller security group. QAD creates the account during the subscription process. The security group assignment cannot be changed. The account password must match the password in poller.properties.

The poller requires a time zone for processing transaction data into the QAD Supplier Portal database. Time zone is essential for the proper sequencing of transactions on kanban cards and for determining which transactions need to be uploaded to the QAD Supplier Portal database.

Menu Item Access. The table shows the differences in access to the QAD Supplier Portal menus and menu items for admin and non-admin security group members. Access to specific fields is covered on each of the maintenance screen help pages. The table does not include menus and menu items that are available to all of these security groups.

Admin » Company

Menu Item	Customer Admin	Customer Non-Admin	Supplier Admin	Supplier Non-Admin
Company	Yes	No	Yes	No
Contact	Yes	No	Yes	No
Supplier	Yes	No	No	No

Admin » Data Management » Data Setup

Menu Item	Customer Admin	Customer Non-Admin	Supplier Admin	Supplier Non-Admin
Working Data Set	Yes	No	No	No
Update History	Yes	No	No	No

Partners Maintenance

Partners Maintenance contains two sub-menus that let supplier users record ship-from and manufacturer DUNS numbers.

Partners Maintenance and its sub-menus are only available to supplier admin users.

Ship From DUNS Number

Use Admin » Company » Partners Maintenance » Ship From DUNS Number to record all possible ship-from DUNS numbers that the organizations uses.

Ship From DUNS Number is only available to supplier admin users.

Tabs

- Ship From DUNS Number Tab
- Search Tab

Ship from DUNS Number Tab, Subtab, and Fields

Data Tab

Ship From DUNS Number. The ship-from site's DUNS number.

The unique nine-digit data universal numbering system (DUNS) number with a four-digit suffix identifying a specific location within your company; for example, a distribution center or a store. DUNS numbers are issued by Dun & Bradstreet to North American businesses and act as a unique identifier for electronic data interchange (EDI) and global electronic commerce transactions.

Only standard customer, consolidated customer, and consolidated supplier accounts can modify their DUNS number through Company Maintenance. Any modification to the regular supplier account DUNS number has to be made by the customer in their system of records. The DUNS number is not validated in QAD Supplier Portal.

Description. A description of the DUNS number.

Default. Select this field to indicate that this ship-from DUNS number is the default number used by the supplier. You can only denote one ship-from DUNS number as the default.

Manufacturer DUNS Number

Use Admin » Company » Partners Maintenance » Manufacturer DUNS Number to record all possible manufacturer DUNS numbers that the organizations uses.

Manufacturer DUNS Number is only available to supplier admin users.

Tabs

- Manufacturer DUNS Number Tab
- Search Tab

Manufacturer DUNS Number Tab and Fields

Manufacturer DUNS Number. The manufacturer's DUNS number.

The unique nine-digit data universal numbering system (DUNS) number with a four-digit suffix identifying a specific location within your company; for example, a distribution center or a store. DUNS numbers are issued by Dun & Bradstreet to North American businesses and act as a unique identifier for electronic data interchange (EDI) and global electronic commerce transactions.

Only standard customer, consolidated customer, and consolidated supplier accounts can modify their DUNS number through Company Maintenance. Any modification to the regular supplier account DUNS number has to be made by the customer in their system of records. The DUNS number is not validated in QAD Supplier Portal.

Description. A description of the DUNS number.

Default. Select this field to indicate that this manufacturer DUNS number is the default number used by the supplier. You can only denote one manufacturer DUNS number as the default.

User Certificate

Field	Description
Transaction ID	Provides the transaction identifier.
Transaction Name	Provides the transaction name.
Requestor User ID	Provides the requestor's user identifier.
Item ID	Provides the item identifier.
Site	Indicates the name, number, or code of the item's site.
User Certificate	Indicates the user-provided security certificate.

User Assistance

Poller Installation Help

For customer admin users, the link to poller installation instructions is always available in the Help menu.

Poller installation activities and tasks are presented in a two-pane window. The table of contents, glossary, and keyword search are in the left pane; task instructions and reference details are displayed in the right pane.

- **Start with the Requirements** covers multiple-database accounts and general, internet, and database communication requirements.
- **Download the Poller** covers downloading for UNIX and Windows systems as well as the Cygwin UNIX environment for Windows systems. The link for downloading the poller is available only from these instructions.
- **Install the Poller** covers extracting the poller files, setting up communication with both the ERP database and QAD Supplier Portal, and implementing the poller account.
- **Poller Operations** covers starting and stopping the poller and troubleshooting operational problems.

Online Help

In the QAD Supplier Portal interface, the link to online Help is always available in the Help menu.

The online Help is displayed in its own window to allow simultaneous viewing of the QAD Supplier Portal screens and views. In the Help window, the topic and index links as well as the Search box are in the left panel. Any selected Help information is displayed in the right panel. Help topics are organized in categories such as these:

- Overview
- Interface
- Views and Details
- General Tasks
- Customer Tasks

- Supplier Tasks

Help for this Page

In the QAD Supplier Portal views, select Help for the Page in the Help menu to display information about the columns/fields in the current view. Column/field Help is available for these views:

- Min/Max
- Time Phase Summary
- Time Phase Detail
- Kanban Board
- Kanban Loop
- Kanban Card
- Orders
- Schedules
- Shipping Forecasts
- ASNs
- Receipts

QAD Supplier Portal Support

For the most current information on support for QAD Supplier Portal, go to:

<http://support.mfgx.net/index.jsp>

In the QAD Supplier Portal interface, there is also a Support link always available in the Help menu. Through this link, QAD customers can access the Incident Management system or request information from QAD Global Services.

QAD Implementation Services

The QAD implementation services team offers a range of consulting services from pre-installation planning, through project layout and design, execution, systems roll-out, and on-going consulting. For more information, see:

<http://support.mfgx.net/services>

Poller FAQs

Installation FAQs

Where should the poller directory be located?

The poller code can reside and be executed on UNIX and Windows systems. It does not need to reside on the same system as the ERP physical database. When the poller and database are on different systems, the systems must be connected via TCP Network and the database must be started in client/server mode.

Can the poller be shared by multiple ERP databases?

No. Each database must have a unique poller account ID—user name and password—associated with a unique subscription and each poller must reside in a unique directory. Multiple pollers can reside and operate on one physical system.

Do I need separate pollers if I use both VMI and EAM (for RFQs) features of Supplier Portal?

Yes, you must have two separate pollers in that scenario. Here are basic instructions for adding a second poller to support EAM RFQs.

Prerequisites

- You can access the EAM database and have identified the connection parameters.
- You have defined a separate poller using Admin » Company » Additional Poller.
- You have set the RFQ Policy using Admin » Company » Company Maintenance » Policies.

Installation

- 1 Download the `svpoller.tar` file.
- 2 Untar the `svpoller.tar` file into a directory.
- 3 Set the following parameters in `poller.properties`:
`eQSV_USER=[poller user]`
`eQSV_PASSWORD=[poller user password]`
`EAM=TRUE`
`EAM_BIDDING_FILE=[work directory path of EAM]`
`SERVER=<url>/sccs/RFQSyncServlet`
- 4 Set the following parameters in `progLaunch.sh`:
`DLC = [get from EAM environment]`
`Propath for EAM = [get from EAM environment]`
`PROGRESS_CONNECTION= [Progress connection parameter]`
`EAM_CONNECTION= [EAM appserver connection parameters]`
`EAM_USER = [EAM user ID]`
`EAM_PASSWORD= [EAM password]`
- 5 While connecting the databases, confirm that `qadddb` also is connected.

- 6 In EAM, the domain is attached to the site. Check the site/domain relationship in EAM and then, in Supplier Portal, use Admin » Company » Company Maintenance to verify that the site's domain has been specified.

Is a Java Runtime Environment (JRE) required for suppliers?

Since suppliers do not use the poller, they do not need a JRE to use QAD Supplier Portal.

Do I need to replace my existing JRE?

Not necessarily. QAD Supplier Portal requires JRE 1.1.8 or higher. On UNIX systems, put the JRE in the system PATH.

Do I need a Web server or Web browser?

QAD Supplier Portal does not require a Web server but the system where the poller resides must have access to the Internet through DSL, cable modem, or the company firewall. If there is a firewall or proxy server, the rules of the port must allow access to and from QAD Supplier Portal.

The poller does not require a browser. Customers and suppliers need a browser to view and maintain data in QAD Supplier Portal. Customers also need a browser to download the poller. Internet Explorer through version 11 and Google Chrome up to most recent versions are the supported browsers. Contact the Support team for browser version issues.

How much disk space does the poller require?

The downloaded .tar file is about 3.4 MB; the unbundled files are approximately the same size.

During operation, the amount of space the poller requires for temporary files, logs, and so on depends on the size of the QAD Supplier Portal working data set and the volume of related data from the ERP database. We recommend a starting directory size of at least 40 MB with room for expansion as operational needs require.

Windows systems also require the Cygwin UNIX environment to run the poller. See the Cygwin site, www.cygwin.com, for information about Cygwin and compatibility with Windows versions.

Note These estimates do not address space requirements for Java, Progress, and so on.

Is any other equipment or software required?

Only the poller, the JRE, and access to the internet are required.

Maintenance FAQs

How can I add a poller?

The Admin » Company » Additional Poller User menu option allows customers to have an additional poller without placing a request with QAD.

This option is intended mainly for customers who want:

- 1 An RFQ Poller in addition to the VMI Poller.
OR
- 2 The ability to load some of the VMI data through a different poller. For example, a customer who loads their ASNs (which are on EDI servers rather than in a QAD ERP system) through a different poller.

Important This feature is limited to one additional poller per customer.

Are there log files for the poller? Where are they located?

The log files are in the poller directory. They are self-maintaining with these exceptions: genload.log, nohup.out, poller.log, and poller.history.

Note All poller files, including the log files, must remain in the poller directory; they cannot be redirected to another directory location. This restriction does not apply to Java, Cygwin, or database files.

How are poller log files maintained?

For the self-maintaining files, there are current files and previous (.prev) files that are overwritten during each polling session. The other log files are appended to and can be edited or truncated when the poller is shut down.

Can poller log files be deleted?

The self-maintaining .prev files can be deleted; they are re-created in each polling session. The other log files should be truncated—keeping the end of the file—rather than deleted.

How can I tell the poller is running? What processes are spawned?

Run one of these commands:

```
./svpoller showlocal
```

or

```
./svpoller showglobal
```

Output can include some or all of the following:

UNIX: start_kv_Poller, executive.sh, kv.jar, sleep

Windows: Java, _progres, sleep

How can I tell which database a poller is running against?

UNIX: Once the poller is started, open an additional window and check the process ID for one of the processes output by `./svpoller showlocal`.

Windows: Check poller.properties for the name of the database; there is no administrative tool for checking which poller is running against which database.

If I accidentally start two pollers, how do I stop only one?

In interactive sessions, you cannot specify which poller to kill if you have more than one running. Generally, CTRL-C ends the current interactive process on both UNIX and Windows/Cygwin. Executing `./svpoller stop` from a new poller window kills all pollers in a given directory.

In background mode—nohup on UNIX only—CTRL-C is ignored. In a new window, use `kill -9` on the poller process ID.

What happens to the poller if the database crashes or the database is shutdown for maintenance?

The poller is resilient to databases going off-line for nightly backups, maintenance, and so on. It continues to retry connecting to an ERP database until the connection is successfully established.

Will stopping or killing the poller harm the database, the poller, or the QAD Supplier Portal site?

Customer database: The database is not made unstable or harmed since it is not being updated. On UNIX servers, Progress Watch Dog (Progress PWDOG) is available to clean up any stranded resources should they occur. This command is not as effective with Windows client/server connections.

Poller files: The files remain incomplete until the next poller cycle occurs and overwrites them with new, updated, well-formed data.

QAD Supplier Portal site: The QAD Supplier Portal site data is safe. To guard against problems introduced during transmission, the QAD Supplier Portal site checks that the files it receives are well-formed and it loads only those that pass file checking criteria.

What happens if the QAD Supplier Portal database crashes?

If the QAD Supplier Portal database crashes during processing, the data is recovered during the next automatic or manual data load.

Does the QAD Supplier Portal database keep cumulative data and averages?

No. During normal processing, data values remain the same unless overwritten by new data.

Can I run MRP with the poller running or is there record locking on the database?

There is no record locking with the poller process so MRP can run at the same time that the poller is running.

How is the polling time interval determined?

For each customer, the polling time interval is the sum of polling/sending time and sleep interval. The amount of data being processed determines polling/sending time; the sleep interval is currently 5 minutes.

Examples: For the customer with a 7 minute polling/sending time, the polling time interval is 12 minutes (7 + 5). For the customer with a 1 minute polling/sending time, the polling time interval is 6 minutes (1 + 5).

The polling time interval is not dependent on the QAD Supplier Portal system clock or the customer's system clock.

Who sets the sleep interval?

QAD maintains the sleep interval. The QAD Supplier Portal server stores and downloads the sleep interval to the poller.

What is the QAD Supplier Portal process for updating the poller code?

The poller processing code is updated on the QAD Supplier Portal server. The customer's poller automatically accesses the new code the next time it contacts QAD Supplier Portal. This process is transparent to users.

Are customers notified about upcoming maintenance or changes at the ASP?

Yes, a notice is posted 48 hours before maintenance or changes. Go to the following URL to check the status board at any time:

<http://support.mfgx.net/statusboard.jsp>

Are alerts issued in response to runaway queries?

No. Use Admin » Update History to track the timing and elapsed time for data loads.

Does any data get written back to the customer database?

No data is written to the customer's ERP database.

Who monitors the poller or the QAD Supplier Portal site?

Customers monitor their own pollers—when to run or bring them down—and manage the few maintenance files as needed. The admin user has access to Admin » Update History for viewing which pollers are actively running, the last time a load was successfully updated, and which build or version of the poller the client is using.

General Information and Tips

What are the Java requirements?

There must be an installed platform-appropriate Java Runtime Environment (JRE) or Java Development Kit (JDK). The JRE is a smaller footprint. The poller automatically uses Java if the JRE is not installed. For complete Java requirements, see the Requirements section of the poller installation.

In which UNIX shell are the poller shell scripts written?

They are written in Stanford shell (.sh).

Does the poller require a separate system user ID and log-in with special characteristics?

No. No special log-in is required for installing the poller; the log-in does need full access to the target installation directory.

What software database is the QAD Supplier Portal ASP host site using?

MySQL.

What software is used for and with the poller?

The operating-system level programs—poller startup, log files, and so on—are UNIX shell script, Java, and Progress. For Windows systems, use Cygwin to create a UNIX environment.

For MFG/PRO databases, Progress code extracts information from the source database.

The extracted information is saved in XML format, then sent to the QAD Supplier Portal site through customers' network and Internet connections.

On which operating system does the QAD Supplier Portal ASP site run?

The QAD Supplier Portal ASP site runs on Red Hat LINUX.

Does poller activity effect the Progress user license count?

Yes. When the poller connects to the database and extracts data, it increments the Progress user license count by one.

Is QAD Supplier Portal available in multiple languages?

In addition to English, QAD Supplier Portal can be viewed and used in a number of languages. See “Display Languages”.

Do split-schema databases affect QAD Supplier Portal use?

There are no special considerations for split-schema databases.

Which UNIX platforms are supported?

QAD Supplier Portal supports HP-UX, IBM AIX, Sun Solaris (SPARC), Compaq Tru64 UNIX, and DG/UX.

Which Windows platforms are supported?

NT using the Cygwin UNIX environment.

For MFG/PRO, which tables are polled?

Currently, these tables are polled in MFG/PRO:

knbsm_mstr	pod_det
knb_mstr	ad_mstr
knbl_det	ls_mstr
knbi_mstr	vd_mstr
knbism_det	in_mstr
knbs_det	ptp_det
knbd_det	vp_mstr
po_mstr	

How many different queries does the poller run against the ERP database?

QAD Supplier Portal has two queries, the data setup query and the transactions query.

The data setup query creates and updates the base data set in QAD Supplier Portal including all items, sites, suppliers, kanban loops, and their related data from the ERP database.

The transaction query loads all kanban transactions from the ERP database into QAD Supplier Portal.

How are items, sites, suppliers, or kanban loops that are added to the ERP system made visible in QAD Supplier Portal?

The poller regularly runs the data setup query against the ERP database to update the base data set in the QAD Supplier Portal.

As functionality changes, will QAD Supplier Portal increase the Progress license user count by running simultaneous queries?

No. The poller is designed to run queries sequentially.

Can the poller run against both Progress and Oracle databases?

Yes. Performance has not been closely compared, but they appear to be the same.

When the poller is started as an interactive process, must the window remain open for the poller to remain active?

Yes.

Can the poller run in a background process?

Yes, on UNIX systems; use `./svpoller nohup` to run the poller.

Can the poller use the Secure Socket Layer (SSL) protocol?

Yes. Replace `http` with `https` in `poller.properties`. SSL requires Java 1.2 or higher.

Maintain Kanban Cards

Use Inventory » Kanban » Card Maintenance to record kanban transactions and to reprint lost or damaged cards.

The maintenance screen records kanban transactions directly into the QAD Supplier Portal database. The entered transactions change the state of kanban cards only in QAD Supplier Portal; they do not affect the state of the cards in the ERP system.

Tasks

Enter a Transaction for One Card

Note Suppliers can enter only Acknowledge and Ship transactions.

- 1 Display the maintenance screen with the desired card number in the Kanban ID field. The screen can be accessed in multiple ways:

Menu choice:

- a Go to Inventory » Kanban » Card Maintenance.
 - b Click in the Kanban ID field and enter the Kanban ID:
 - Manually type the Kanban ID into the field.
- or**
- Scan the bar code on the card with a bar code reader that is integrated with the computer system.

From the Card view:

- a Go to Inventory » Kanban » Card.
- b Click on the Kanban ID link for the desired card. This displays the maintenance screen with the card number in the Kanban ID field.

From the Board or Loop view:

- a Go to Inventory » Kanban » Board or Loop.
- b In the Loop Status column, click on one of the card icons to display Loop Status Detail.

- c In the Kanban Card section, click on the Kanban ID link for the desired card. This displays the maintenance screen with the card number in the Kanban ID field.
- 2 Review the current state of the card. If you opened the maintenance screen from one of the views, the current state is displayed. If you opened the screen from the menu, click the Get Current State radio button then click Submit.
- 3 Click the radio button for the desired transaction.
- 4 Click Submit. QAD Supplier Portal saves the transaction to the QAD Supplier Portal database, changes the card state, and updates the displayed card data.

Enter a Transaction for Multiple Cards

Note Suppliers can enter only Acknowledge and Ship transactions.

A chosen transaction persists until you choose a new transaction or leave the maintenance screen.

- 1 Follow the steps for entering a transaction for one card.
- 2 Note that the chosen transaction persists after you click Submit for the first card.
- 3 Clear the Kanban ID field.
- 4 Scan or manually type another card number into the Kanban ID field.
- 5 Click Submit.
- 6 Repeat the Clear, Enter, and Submit steps for all desired card numbers.

Print a Lost or Damaged Card

Cards should be printed from this screen only if they have been lost or damaged. Use the Print tab on Inventory » Kanban » Board for normal card printing.

- 1 Follow the steps in Enter a Transaction for One Card to display the maintenance screen with the desired card number in the Kanban ID field.
- 2 Click Print to display the File Download dialog.
- 3 Click Open to display the card in Adobe Acrobat Reader for printing.

Note You may need to click Open more than once.

- 4 In the Acrobat Reader window, use File » Print to print the card.

Reference

Card Numbers

Card numbers can be entered manually or through a bar code reader that is integrated with a computer system. Scanned numbers include the customer ID and have the form KCustomerIDCardNumber; for example:

K00000015432

where:

- **K** indicates a kanban transaction
- **0000001** is the seven-character base36 customer organization ID
- **5432** is the ID for the scanned card

Loops without FIFO Lanes

The tables show the current card state, transaction to enter, and new card state for a number of customer and supplier scenarios for loops without FIFO lanes.

Current Card State	Example Activity or Event	Transaction to Enter	New Card State
Full	Customer machinist uses the last item in a kanban container.	Consume	Empty accumulator
Empty accumulator	In a particular loop, the number of kanban cards with the empty accumulator state has reached the accumulate threshold, based on quantity, quantity and a fixed interval, or quantity and a scheduled time. The customer planner authorizes an Order Qty of kanbans for production.	Authorize	Empty authorized
Empty Authorized	Supplier planner sees that a card state has changed from full to empty authorized in QAD Supplier Portal and acknowledges the requirement to fill the kanban.	Acknowledge	Acknowledged
Acknowledged	Supplier shipping clerk ships a full kanban container of items to a customer.	Ship	Shipped
Shipped	Customer receiving clerk receives a full kanban container of items.	Fill/Receive	Full
Full	Items may need to be set aside temporarily, such as while awaiting inspection.	Hold	Hold
Hold	The purpose of the temporary set-aside period has been fulfilled.	Release	Full

Loops with FIFO Lanes

Loops with a defined sequence of processes connected by first-in first-out (FIFO) lanes must have a supply source type of process. The supplying process is the primary process; the sequenced processes in the loop are FIFO processes. Since the supply source type must be process, these loops are within-factory, they are not relevant to external suppliers.

FIFO Lanes

Lean manufacturing uses first-in-first-out (FIFO) lanes to connect a sequence of processes within a kanban loop. There are no intervening supermarkets between the processes in a loop.

The supply source type for the loop must be process. This supplying process is referred to as the primary process while the sequence of processes within the loop are referred to as FIFO processes. The supplying process receives the signal to produce from the supermarket. The output of the first process moves through the FIFO lane to the following process.

Each kanban in a loop that has FIFO processes must pass through each of the FIFO processes in sequence specified for the loop. Process operators use a ship transaction to move a kanban to the next FIFO process or to the supermarket. With the application of the ship transaction, the card is in the in process state. See “Transaction Loading Retry Queue and Log”.

Item Maintenance

Use Admin » Company » Item » Item Maintenance to interactively set item policy values such as minimum quantity and maximum quantity for item-sites managed as VMI inventory.

Use an appropriately formatted text file, placed in the VMI poller directory, to automatically update item policy values as frequently as once each hour.

Tabs, Subtabs, and Fields

Item Tab

Policy

Item ID. The item number, name, or code from the customer ERP system or other data source.

Note When this field is a link, clicking this link opens the Item Detail view.

Site. This ID is the number or code for the site from the customer ERP system or other data source.

Site Description. This is the name of the site or information about the site from the customer ERP system or other data source.

UM. Quantities are expressed in the unit of measure used for item stocking.

Item Display. QAD Supplier Portal displays an item according to the non-Default value in this field in Admin » Company » Item Maintenance.

- Min/Max focuses on the inventory status of an item relative to the requirements for quantity on hand specified in Item Maintenance.
- Time Phased focuses on how demand and supply, such as schedules and ASNs, affect inventory status over time.

If the value is Default in Item Maintenance, QAD Supplier Portal displays the item according to the non-Default value in this field in Supplier Maintenance.

If the value is Default in both Item Maintenance and Supplier Maintenance, QAD Supplier Portal displays the item according to this field value in Customer Maintenance, where Default is not an option.

Replenishment Calculation Policy. •Select a basis for calculating the replenishment quantity for an item:

- Schedule-controlled replenishment. This selection enables the Schedule Replenishment Horizon field.
- Min/max-controlled replenishment. Default.

For details, see “Replenishment Calculations”.

Schedule Replenishment Horizon. This field is enabled when Replenishment Calculation Policy is set to Schedule-controlled replenishment. It is the number of work days on the schedule to use when calculating the replenishment quantity.

Min/Max Calculation Policy. Select a calculation method for min/max quantities:

- Enable min/max quantity calculations. This disables the Minimum Quantity and Maximum Quantity fields for manual entry.

Minimum = Average Demand * Safety Stock Days

Maximum = Average Demand * (Fixed Ordering Interval + Order Lead Time + Replenishment Time + Order Quantity Days + Safety Stock Days)

- Disable calculations, use manual entries.
- Default. Use the Min/Max Calculation Policy defined in Company Maintenance. This disables the Minimum Quantity and Maximum Quantity fields if the policy for the company is set to enable calculations.

Minimum Quantity. Specify the minimum quantity of this item that you want to have in inventory. This value is not from the customer ERP system. This cannot be a negative number.

Maximum Quantity. Specify the maximum quantity of this item that you want to have in inventory. This value is not from the customer ERP system. This cannot be less than one or less than the minimum quantity.

Order Point Calculation Policy. Select a calculation method for order point quantities:

- Enable order point quantity calculations. This disables the Order Point Quantity field for manual entry.

Order Point = Minimum + (Delivery Lead Time * Average Demand) + (Order Lead Time * Average Demand)

- Disable calculations, use manual entry.
- Default. Use the Order Point Calculation Policy defined in Company Maintenance. This disables the Order Point Quantity field if the policy for the company is set to enable calculations.

Order Point Quantity. When the QOH + ASNs <= order point, the replenishment quantity is calculated and displayed in the Replenishment Quantity column/field.

Demand Template. The template specifies the number of actual history days and the number of forecast days to use in calculating the average demand. A template can be attached to any number of item-sites. Define templates in Admin » Company » Demand Calculation Template.

Safety Stock Days. The days of inventory required to protect against fluctuations in supplier delivery and transportation.

The default is to have the poller load this data from the ERP system. Valid values are 0 to 999.

Click the Set Manually check box to enable the field for updating this value manually. The poller does not overwrite manual updates. Clear the check box to return to poller updates.

Replenishment Quantity Rounding. Select a method for rounding replenishment quantities:

- Round up to the nearest non-zero order multiple. Default.
- Round down to the nearest non-zero order multiple.

- Percentage-based rounding is based on the remainder when the replenishment quantity is divided by the order multiple. Round up to the nearest order multiple when:

Remainder $\geq$ (Rounding % * order multiple)

Round down to the nearest order multiple when:

Remainder $<$ (Rounding % * order multiple)

For details, see “Min/Max-Controlled Replenishment”.

Rounding Percentage. This is the percentage of the order multiple that is used in percentage-based rounding of replenishment quantities for min/max-controlled items. This field is displayed only when Replenishment Quantity Rounding is set to percentage-based rounding. Valid values are 1 to 100.

For details, see “Min/Max-Controlled Replenishment”.

Order Multiple Quantity. Suppliers use this multiplier to determine quantities needed to replenish inventory.

When suggested replenishment quantity is not specified, QAD Supplier Portal uses this value, if it is non-zero, to generate a calculated replenishment quantity. This cannot be a negative number.

For details, see “Min/Max-Controlled Replenishment”.

Suggested Replenishment Quantity. If this value is zero, QAD Supplier Portal calculates a replenishment quantity based on maximum quantity, QOH, in-transit ASN quantity, and order multiple quantity.

QAD Supplier Portal displays suggested or calculated replenishment quantity in the Replenishment Qty column in either of these circumstances:

- When min/max is used and item inventory is less than minimum
- When order point is used and item inventory is less than order point

For details, see “Min/Max-Controlled Replenishment”.

Fixed Ordering Interval. The equivalent of accumulated lead time, this is the number of days between orders sent to a supplier. Valid values are 0 to 999.

Order Lead Time. Enter the number of days that it takes a supplier to receive an order and to make it available for shipment. Valid values are 0 to 999.

Replenishment Time. This is the number of days required to ship the product, transport it, and receive it at the customer site. Valid values are 0 to 999.

Order Quantity Days. The equivalent of buffer stock days, this is the number of days worth of inventory required to protect against fluctuations in the production process and demand. Valid values are 0 to 999.

Net Weight. Specifies the weight of the item with no shipping materials. You can change the default by clicking the Set Manually check box and entering a new value.

Net Weight UM. Specifies the net weight unit of measure: the unit of measure (for example, pounds or kilos) for the item weight. You can change the default by clicking the Set Manually check box and entering a new value.

Ship Weight. Specifies the weight of the item plus its shipping materials. You can change the default by clicking the Set Manually check box and entering a new value.

Ship Weight UM. Specifies the ship weight unit of measure: the unit of measure (for example, pounds or kilos) for the item in its shipping container. You can change the default by clicking the Set Manually check box and entering a new value.

Ship Volume. Specifies the ship volume: the volume of the item plus its shipping materials. You can change the default by clicking the Set Manually check box and entering a new value.

Ship Volume UM. Specifies the ship volume unit of measure: the unit of measure (for example, cubic feet or cubic meters) for the item in its shipping container. You can change the default by clicking the Set Manually check box and entering a new value.

Item Draw. Specifies the item drawing number: the latest revision of drawing for this item. You can change the default by clicking the Set Manually check box and entering a new value.

Standard Pack. Specifies the number of units of the item usually shipped in one container. You can change the default by clicking the Set Manually check box and entering a new value.

Container Type. Specifies the identifier given to the type of container usually used to ship the item. You can change the default by clicking the Set Manually check box and entering a new value.

Container Tare. Specifies the weight of the container without the item in it. You can change the default by clicking the Set Manually check box and entering a new value.

Image

Image. Click Select Image to open the Select Image dialog for specifying an image of the item to display.

Search Tab

Subtab	Description
Data	Records displayed as specified on the Filter and Display subtabs. Click the column labels to sort the data rows.
Filter	Use the Filter subtab to specify the search criteria for selecting which records to include in the Data subtab display.
Display	Use the Display subtab to specify which columns to include in the Data subtab display.

Item Maintenance Tasks

- 1 Go to Admin » Company » Item Maintenance.
- 2 Use the Filter and Display subtabs as shown in the Search Tab table to refine the display on the Data subtab.
- 3 On the Data subtab, click an Item ID link to open that record on the Item tab.
- 4 Update the item record using the subtabs as shown in the Item Tab table, then click Save.

Maintaining Item Policies with an Imported File

Use any text editor to create the space-delimited flat file.

- 1 Create an appropriately formatted inventory item policy file. Review the file formats and validation criteria in the Loading Inventory Item Policies document:
 - Flat file format
 - Validation
- 2 Create the flat file using your item data and following the example.
- 3 Save the file.
- 4 Place the file in the poller directory where the poller loads it into the QAD Supplier Portal database as frequently as once each hour.

User Log-In Summary

The report screen, Admin » Company » User Log-In Summary, displays the log-in and log-out history for users over the past six months.

Admin users for customer accounts and consolidated customer accounts can see the report for all customer and supplier users. Admin users for supplier and consolidated supplier accounts can see the report for supplier users. This report is not available to non-admin users.

Use the Supplier column to quickly differentiate between customer and supplier users: for supplier users, there is an entry; for customer users, there is none.

The log-in and log-out dates are displayed in the user-defined time zone. The log-out date is blank in several circumstances:

- The user has logged in and is currently using QAD Supplier Portal
- The user session has timed out
- The user closed the browser window without logging out of QAD Supplier Portal

User log-in records cannot be deleted from within QAD Supplier Portal; use a Cron job to perform a mass delete.

Consigned Inventory History Reports

Use the Consigned Inventory History Report subtab on the Print tab in the Inventory » Min/Max and Kanban Board views to define the consigned inventory report.

Define the Report

The format and content of the report are determined by the following fields.

From-To Supplier. These are the first and last suppliers in a range of suppliers. Items to be processed must be associated with one of the suppliers in this range.

From-To Usage Date. These are the first and last dates in the range of usage dates to be processed.

From-To Item. These are the first and last items in the range of items to be processed.

From-To Supplier Item. These are the first and last supplier items in a range of supplier items to be processed.

From-To Site. These are the first and last sites in a range of sites. Items to be processed must be associated with one of the sites in this range.

From-To Receiver. These are the first and last receivers in the range of receivers to be processed.

From-To Lot/Serial. These are the first and last lot/serial numbers in a range of lot/serial numbers. Items to be processed must be associated with one of the lot/serial numbers in this range.

From-To Buyer. These are the first and last buyers in a range of buyers. Items to be processed must be associated with one of the buyers in this range.

From-To Shipper ID. These are the first and last shipper identifiers in a range of shipper identifiers.

Format. QAD Supplier Portal creates reports in Acrobat PDF, comma-separated values (CSV), or symbolic link (SLK) format.

In CSV format, numbers are stored as numeric values even in text fields; for example, if a site ID is 002, the leading zeros are removed and the ID is stored as the numeric value 2 in the Site text field.

Note The delimiter specified on the Preferences subtab of the User tab in Admin » User Maintenance determines whether you can open CSV-format reports directly or only save them.

In SLK format, values—numbers, quantities, dates, times—are formatted according to the language specified in Control Panel » Regional and Language Options. Additionally, numbers can be stored as text or numeric values in text fields. The default in Excel is text values.

- To accept the default, go to the Error Checking tab in Tools » Options to disable the Number Stored as Text error checking rule.
- To make the storage choice for cells individually, enable the error checking rule. In the report, each cell with a numeric value stored as text is marked in the upper left corner with a green triangle. Select a cell to display the Trace Error icon. Highlight the icon and click the arrow to display the menu; select Convert to Number.

Orientation. QAD Supplier Portal can generate PDF-format reports in portrait or landscape orientation. Orientation applies to only PDF-format reports.

File Name. File name is used when saving reports. The default is report.file-type-extension.

Generate the Report

Follow these steps to generate the report:

- 1 Go to the Print » Report subtab.
- 2 Make entries and select options as desired. For field details, see the report-definition table.
- 3 Click Run to open the File Download dialog.

- 4 Select Open or Save; then, click OK.

Acrobat PDF files open in Adobe Acrobat. CSV and SLK files open in Microsoft Excel if it is present; if not, the system prompts the user for an application to use.

Note For Acrobat PDF files, there is a bug in Internet Explorer (IE) 5.5 Service Pack 1; the problem is not in IE 5.5 or Service Pack 2. When using IE 5.5 with Service Pack 1, the best course is to upgrade to Service Pack 2. Alternatively, the following workaround may be useful:

- 1 Click the option: Open this file from its current location.
- 2 Click OK to display the file in Adobe Acrobat for viewing or printing.
- 3 If the dialog reappears, deselect the option: Always ask before opening files of this type.
- 4 Click OK.

Review the Report

The report includes these columns/fields; only the reports generated by consolidated account users have the Customer ID, Customer Business ID, Customer Name, Supplier ID, Supplier Business ID, and Supplier Name fields:

Order Number. The purchase order number is from the ERP database.

Note If this field is a link, clicking the order number link displays the Purchase Order Detail view.

Line. Order line number.

Customer ID. The customer name, number, or code ID from the ERP system or other data source.

Customer Business ID. This field is relevant only for consolidated accounts with multiple linked customer accounts. The customer business ID—set by the customer in Admin » Company » Company—differentiates data for the same customer from multiple ERP systems, databases, or data sources.

The default is the customer identifying number or ID code from the subscription form.

Company Name. For customer companies, the company name defaults from the subscription form. For supplier companies, it defaults from the data source.

Supplier ID. The identifying number or ID code for a supplier is loaded from the ERP system or other data source. For VMI items, only suppliers associated with item-sites in the VMI working data set are available in the views.

Note When this field is a link, clicking the link opens the Supplier Address Detail view.

Supplier Business ID. This field is relevant only for consolidated accounts with multiple linked supplier accounts. The supplier business ID—set by the supplier in Admin » Company » Company—differentiates data for the same supplier from multiple ERP systems or data sources.

The default is the supplier identifying number or ID code that is loaded in QAD Supplier Portal from the customer's ERP system or other data source.

Supplier. The supplier name or description is loaded from the ERP system or other data source. Note that during load operations for the VMI poller, if the supplier on a Purchase Order is changed and if the purchase order has any transactions (such as receipts or ASNs) or if the purchase order is a scheduled order, the supplier will not be changed on the purchase order.

Ship To. The address code for the ship-to address is from the ERP database.

Ship-to names attached to new receipts in the ERP system are updated in QAD Supplier Portal as frequently as every five minutes. All ship-to names are updated no more than once per hour in the general working data set update from the ERP system.

Note When this field is a link, clicking the link displays the Ship-to Address Detail view.

Item ID. The item number, name, or code from the customer ERP system or other data source.

Note When this field is a link, clicking this link opens the Item Detail view.

Supplier Item ID. This is the supplier's identifier of an item.

Shipper ID. The ID is the identifying number for the shipper record.

Transaction Number. This number is unique and assigned by the ERP system.

Last Consigned Used Date. This is the date of the most recent consumption of consigned inventory. It is based on the transaction effective date and the transaction number.

Note If this is a link, clicking the link displays the Consigned Inventory Detail view.

Lot/Serial. This inventory transaction is associated with this lot/serial number. Lot/serial numbers facilitate tracking of all transactions associated with a sales or purchase order.

Last Consigned Used Qty. This is the quantity of consigned inventory consumed in the most recent transaction.

Note If this is a link, clicking the link displays the Consigned Inventory Detail view.

Cum Used Quantity. This is the cumulative quantity of consigned inventory used—in the UM for the item—for a PO line.

UM. The unit of measure for quantities is from the purchase order line.

Receiver. This is the number assigned to the receiving record, the receiver, created by a receipt against a purchase order.

Receipt Qty. This is the quantity received against the purchase order line.

Transaction Date. This is the date that the transaction was entered in the system. The effective date for the transaction is Used Date.

Issue Maintenance

Use Admin » Collaboration » Issue Maintenance to maintain issues for association with collaboration message threads.

Tabs, Subtabs, and Fields

Issue Tab

Issues Subtab

Issue. Field for entering the name of a new issue.

Search Tab

Issues Subtab

Issues. Lists the issues, their associated domain objects, and their list order.

- Domain Object
- Issue
- Order

Reorder. (Issue List). Use the up and down icons to change the order of the issues.

Issues Maintenance Tasks

Create and Maintain Issues

To create an issue:

- 1 Go to Admin » Collaboration » Issue Maintenance. This displays the Search tab.
- 2 To create a new issue, click New Issue.
- 3 In the Issue field, enter the issue name.
- 4 Click Save.

To reorder issues:

- 1 Go to Admin » Collaboration » Issue Maintenance. This displays the Search tab.
- 2 Click Reorder.
- 3 Use the up and down arrow icons to change the order of issues.

Status Maintenance

Use Admin » Collaboration » Status Maintenance to create and maintain statuses for collaboration message threads.

One of the statuses can be assigned as the default status. The default status is the status that will be selected by default when a new message thread is created. Only one status can be the default status. If you already have a status that is the default, and you select this new status as the default, then the previous default is automatically set to no longer be the default.

One of the statuses can be identified as the closed status. You can use the closed status to filter out message threads that are only of historical interest. Only one status can be the closed status. If you already have a status that is the closed status, and you select this new status as the closed status, then the previous closed status is automatically set to no longer be the closed status. (A status can not be both the default status and the closed status.)

Tabs, Subtabs, and Fields

Status Tab

Status Subtab

The Status, Default, and Close fields contain Status information.

Search Tab

Statuses Subtab

The Domain Object, Status, Default, Close, and Order fields list the statuses, their associated domain objects, status names, whether a given status is the default or is the closed status, and their list order.

Reorder Subtab

The (Issue List) field uses the up and down icons to change the order of the statuses.

Status Maintenance Tasks

Create and Maintain Statuses

To create a new status:

- 1 Go to Admin » Collaboration » Status Maintenance. This displays the Search tab.
- 2 To create a new status, click New Status.
- 3 In the Status field, enter the name of the status.
- 4 In the Default check box, specify whether this status is the default status.
- 5 In the Close check box, specify whether the status can apply to message threads that are considered closed.

To reorder statuses:

- 1 Go to Admin » Collaboration » Status Maintenance. This displays the Search tab.
- 2 Click Reorder.
- 3 Use the up and down arrow icons to change the order of statuses.

Topic Maintenance

Use Admin » Collaboration » Topic Maintenance to create and maintain topics on a supplier basis for association with collaboration message threads.

When you create a message thread that is not associated with a domain (Item, Kanban, Organization, Purchase Order Header, Purchase Order Line, or Schedule), you can create a message associated with any of the topics that have been defined in Topic Maintenance.

Topic Tab

The Title, Supplier, Issue Enabled, and Status Enabled fields are topic information fields, including the title of the topic, whether message threads created from the topic will include a field to define the issue, and whether message threads created from the topic will include a field to define the status.

Search Tab

Topics Subtab

The Title, Supplier ID, Supplier, Issue Enabled, and Status Enabled fields all list the topic information.

Topic Maintenance Tasks

Create Topics

To create a topic:

- 1 Go to Admin » Collaboration » Topic Maintenance. This displays the Search tab.
- 2 To create a new topic, click New Topic.
- 3 In the Title field, enter a title for the topic.
- 4 From the Supplier pull-down, select a supplier to be associated with the topic.
- 5 In the Issues Enabled check box, specify whether message threads created from the topic will include a field to define the issue.
- 6 In the Status Enabled check box, specify whether message threads created from the topic will include a field to define the status.

Collaboration Message Deletion

You can delete message threads using the Collaboration Message Deletion screen. To access the screen, choose Admin » Data Management » Delete Records » Delete Messages.

To delete messages:

- 1 In the Collaboration Message Deletion screen, you can specify a set of message threads within a range by setting the From-To Creation Date and Modified Date fields. You can also specify a message thread topic in the Topic Title field.
- 2 Set Delete to yes if you want to delete at this time.
- 3 Set Print to yes if you want to print a report at this time. You can print a report before, during, or after a deletion.
- 4 If you set Print to yes, select the format and orientation of the report by setting the Format and Orientation fields. For example, you can generate a PDF with landscape orientation.
- 5 Click Run.
- 6 If printing, click OK in the Processing. Please Wait... pop-up window that appears.

Column/Field Descriptions

This table includes all columns/fields that are available on the screen.

Column/Field	Description
From-To Created Date	These are the first and last created dates in a range of dates.
From-To Modified Date	These are the first and last suppliers in a range of suppliers.
Topic Title	Enter the topic title of the message thread.
Closed	Select yes to delete closed message threads.
Delete	Select yes to delete message threads within the specified ranges.
Print	Select yes to print message threads within the specified ranges.
Format	Select Acrobat PDF, comma-separated values (CSV), or symbolic link (SLK) format.
Orientation	Orientation applies only to PDF-format. QAD Supplier Portal can generate PDF files in portrait or landscape orientation.
File Name	Specify the file name.

Reference Link Maintenance

Field	Description
Content Description	The descriptive text you want to use to identify the link.
Reference Link	This is the Uniform Resource Locator (URL) of the reference link. The URL must be the full path including the protocol (http://, ftp://). In other words, URLs must be fully qualified, with no abbreviations. Following are some examples: For http sites outside your firewalls: http://www.google.com For ftp sites outside your firewalls: ftp://www.abcdefg.com For http sites inside your firewalls: http://inside.qad.com
Edit/Delete	Click the Go button to edit or delete the selected reference link. Click the New Reference Link button to create a reference link.

RFQ (Request For Quotation)

QAD Supplier Portal's RFQ functionality enables customers to track Requests for Quotes (RFQs) submitted to their qualified suppliers and for suppliers to bid on those RFQs. It works in conjunction with QAD Enterprise Asset Management (EAM). RFQs are created and maintained in EAM. The RFQ information (including status changes) is loaded into QAD Supplier Portal. Suppliers can bid on RFQs in QAD Supplier Portal and the bids will be loaded back into EAM. Notifications of changes in the RFQ status (including the awarding of the RFQ) can be emailed automatically; see "RFQ Notifications" on page 202.

When RFQ data is imported, if there is a supplier on an RFQ created in EAM that is not currently in QAD Supplier Portal, the supplier will be added to QAD Supplier Portal. Similarly, if there is an item on an RFQ created in EAM that is not currently in QAD Supplier Portal, the item will be added to QAD Supplier Portal's RFQ

Note To use this functionality, the customer must have both QAD Supplier Portal and EAM 12.1 or greater. Additionally, an RFQ Poller must be installed. Contact your QAD support representative for more details on installing the RFP Poller.

Enabling RFQ Functionality

RFQ functionality must be enabled by the customer admin before it can be used. This is done by setting RFQ policies on the "Company Maintenance" page.

Two policies must be set:

- RFQ Policy - which determines if the RFQ functionality is turned on or off.
- RFQ Notification Policy - which determines who is notified of status changes and supplier's bids on an RFQ.

See "Company Maintenance" for details.

Creating and Maintaining RFQs

RFQs are created and maintained by customers in QAD Enterprise Asset Management (EAM). For information about creating, changing the status of, awarding, and closing RFQs, consult the *QAD Enterprise Asset Management User Guide*.

RFQ Views

There are two RFQ views:

"RFQ Main View"

"RFQ Detail View"

Note Customers can view all data for all RFQs. Suppliers can only view data for RFQs on which they are authorized to bid.

RFQ Main View

The RFQ Main view includes the RFQ header and line information. It has the following fields:

RFQ Header Information

Site. The site issuing the RFQ.

RFQ Number. The number of the RFQ.

RFQ Description. Text description of the RFQ.

Buyer. The buyer who is the contact point for the RFQ.

Status. The current status of the RFQ. It will be one of the following:

- Open - RFQ is open for bidding. RFQs with this status are visible to suppliers, who can enter bids through the Bid Line. A supplier can only see their own bids.
- Closed/Awarded - RFQ is no longer open.

Note Status is changed in EAM and updated to QAD Supplier Portal. Notifications of changes in status are emailed according to the setting in the RFQ Notification Policy on the Company Maintenance page.

Commodity Code. The commodity code of the item on the RFQ.

Commodity Code Description. The description of the commodity code.

Department. The department issuing the RFQ.

Department Description. The description of the department

Ship To. The site to which items are to be shipped.

Bill To. The site to which items are to be billed.

Response Due Date. The date before which any bids on the RFQ must be submitted.

Technical Contact. The technical person who is the contact point for the RFQ.

Technical Contact Description. The description of the technical contact

RFQ Line Information

Part. Part number of the part to be supplied.

Part Description. Description of the part to be supplied.

Quantity. Quantity of the part to be supplied

Date Required. The date by which the part must be supplied.

UM. The unit of measurement of the part to be supplied.

RFQ Detail View

The RFQ Detail view is displayed by clicking on the RFQ Line Information on the “RFQ Main View”. This view displays bidding information on the RFQ.

Suppliers can only see their own bidding information. Customers can see all bidding information.

In addition to the RFQ Header information, the RFQ Detail View has the following fields:

Supplier Id. The identifier of the supplier who made this bid.

Alert Email. The supplier's email address to which RFQ status changes are to be sent, if notification is enabled.

Bid Quantity. The quantity of the part entered in the bid.

Bid Price. The price of the part entered in the bid.

Vendor Part Number. The supplier's part number for the part in this bid.

Vendor Bid Currency. The currency used by the supplier in this bid.

Bid Expiration Date. The date by which this bid must be accepted. After this date, the price expires.

Delivery Date. The date by which the supplier will deliver the part.

Bid UM. The unit of measurement used in this bid.

Award Status. Indicates if RFQ has been awarded to this supplier: Y/N

Award Quantity. Indicates the quantity awarded to this supplier, if award status is Y. If N, it is empty.

Award Date. The date the RFQ was awarded.

Bidding on an RFQ

A supplier enters a bid on a RFQ by entering bid information in the Bid Response Line which appears in for which they are an authorizer bidder.

To enter a bid:

1 Click the Bid button in the RFQ Detail View to switch into bid edit mode.

2 Enter the bid information, including:

Bid Quantity. The quantity of the part entered in the bid.

Bid Price. The price of the part entered in the bid.

Vendor Part Number. The supplier's part number for the part in this bid.

Vendor Bid Currency. The currency used by the supplier in this bid.

Bid Expiration Date. The date by which this bid must be accepted. After this date, the price expires.

Delivery Date. The date by which the supplier will deliver the part.

Bid UM. The unit of measurement used in this bid.

3 Click Save to save and enter the bid information.

Note Only RFQs with an Open status can be bid on and/or have bidding information updated. Suppliers can only see and update their own bids.

RFQ Notifications

A special Alert group (which does not require configuration) supports notifications to interested parties throughout the RFQ cycle.

Note Notifications are controlled by the RFQ Notification Policy on the Company Maintenance page. Based on that setting, e-mail can be sent to only the supplier, to both the supplier and the customer, or not at all.

Events that can trigger RFQ notifications are:

- **New RFQ Created.** This event is triggered when an open RFQ in EAM is loaded into QAD Supplier Portal (previously, the RFQ did not exist in QAD Supplier Portal).
 - Customer receives e-mail notification that a new Open RFQ has been loaded into QAD Supplier Portal, including list of suppliers.
 - Suppliers receive e-mail notification that the RFQ has been loaded into QAD Supplier Portal. Each supplier receives only their own information; the e-mail does not include information about other suppliers.
- **RFQ Modified.** This event is triggered when an RFQ is modified in EAM and loaded into QAD Supplier Portal (previously, the RFQ existed in QAD Supplier Portal with Open status).
 - Customer receives e-mail notification that an updated RFQ has been loaded into QAD Supplier Portal, including list of suppliers.
 - Related suppliers receive e-mail notification that an updated RFQ has been loaded into QAD Supplier Portal. Each supplier receives only their own information; the e-mail does not include information about other suppliers.
- **Bid Entered.** This event is triggered when the supplier enters a bid into the QAD Supplier Portal UI (previously, the RFQ existed in QAD Supplier Portal with Open status).
 - Customer receives e-mail notification that a bid on the RFQ has been entered in QAD Supplier Portal, including information about the bid.
 - The supplier who entered the bid receives e-mail notification that the bid has been entered in QAD Supplier Portal.
- **RFQ Closed.** This event is triggered when the RFQ is closed in EAM and loaded into QAD Supplier Portal (previously, the RFQ existed in QAD Supplier Portal with Open status).
 - Customer receives e-mail notification that the RFQ has been closed and loaded into QAD Supplier Portal, including information about the award.
 - The supplier who entered the winning bid receives e-mail notification that the bid has been awarded to them, including information about the award.
 - Suppliers who entered unsuccessful bids receive e-mail notification that the RFQ has been closed.

Glossary

Account Organizations. A standard organization account reflects data from one ERP source. A consolidated organization account displays data from the standard organization accounts that are linked to it. Using consolidated accounts, customers can consolidate the data from multiple ERP systems into one view and suppliers can consolidated the data for multiple customers into one view.

Accumulator. A software agent for accumulating empty kanbans that are not authorized for production. There are three types: quantity, quantity and a fixed interval, quantity and a scheduled time. When the accumulator reaches the quantity/time threshold, an Order Qty of kanbans are authorized for production. Interval time, next accumulator date, and next accumulator time are defined for a loop.

Action Bar. The top border of each view and screen, it has setting boxes and icons for a number of functions such as the number of rows to display on each view page and printing from views.

Admin User. Admin users have access to the administration functions through the Admin tab. The customer master admin user is defined during the subscription process. The customer master admin user defines the supplier master admin user in Admin » Supplier » Maintenance. Customer and supplier admin users define nonadmin users for their respective companies.

Alert. A software agent that analyzes business events to determine whether critical business situations have occurred. When such a situation occurs, the alert system notifies the user.

Alert Enabled Application. An application that is configured to work with QAD Supplier Portal Alerts.

Alert Notification. A message sent by the alert system—such as e-mail, fax, phone—to users when an alert detects a critical business situation.

Alerts Subscriber. An application subscriber who holds an alert service account. Only subscribers can define alerts.

Application Subscriber. A user who is a subscriber to at least one of the hosted applications: QAD Supplier Portal, PV.

ASN. Advance ship notice. An EDI shipping document that precedes the actual receipt of the shipment. In most EDI situations, within 15 minutes of the shipment of material, suppliers are required to send an ASN to the customer. The supplier sends the ASN to alert the customer that the materials are in transit.

ASP. Application service provider. A company that offers individuals or enterprises access over the Internet to applications and related services that would otherwise have to be located on their own personal or enterprise computers.

Backflush. A function used when a finished assembly is completed to indicate consumption of the components of that assembly without having to release a work order or individually issue each component.

Base Data Set. The base data set—items, sites, suppliers, and associated data—is imported to the QAD Supplier Portal database from the ERP database; it is the basis for the working data set. Users update this data set with manual or auto data load.

Business Event. A condition occurring inside an alert-enabled application.

Container Type. User-defined for an item; for example, basket, pallet, drum. Each container holds a kanban quantity of items.

Customer. The customer of the supplier. The customer is usually a manufacturer that purchases the supplier's items. The customer could also be an internal customer from one division of a company consuming items produced by a different division of that company.

ID Bar. The bottom border of each view and screen, it shows the company name, the individual user name, and the current time zone set in the QAD Supplier Portal database for that customer.

FIFO Lane. Lean manufacturing uses first-in-first-out (FIFO) lanes between two or more manufacturing processes within a kanban loop. The first process receives the signal to produce from the supermarket. When a ship transaction is performed on a card at the conclusion of the first process or any intermediate processes, the card state changes to In Process. The ship transaction at the final process changes the card state to Shipped.

FOB. Free On Board. The terms of sale that indicate where title passes to the buyer.

Integration Kit. The Integration Kit—included in poller.tar—contains the information required for integrating QAD Supplier Portal with non-MFG/PRO ERP databases or other data sources.

Invoice. A document containing information about the purchase or sale of goods. States credit terms and cash discounts, if any.

Kanban. A Japanese method of production and inventory control first developed and used at Toyota. Designed for day-to-day on-floor control of production and inventory within work centers, it relies on a series of control triggers, typically in the form of cards. Kanban is the predecessor of Just in Time (JIT). This term also refers to the set of items represented by a kanban card.

QAD Supplier Portal visualizes supply for both kanban data and VMI data, using data type-specific working data sets and pollers. Kanban inventory is managed through pull replenishment—customers pull inventory from suppliers as needed—while VMI inventory is managed through push replenishment—suppliers push inventory to customers according to orders or schedules.

Kanban Card. Card printed and placed on a container in a kanban-controlled production environment.

Kanban Card Types. In a one-card kanban system, all cards are replenishment cards. In a two-card system, there are move cards and replenishment cards.

Kanban Dispatch List. A list used to move groups of empty kanban containers back to a supplying source for replenishment.

Kanban Loop. The flow of kanban-controlled material from a supplying source to a supermarket.

Kanban Quantity. The number of items in each replenishment kanban. This number may be different for replenishment kanbans and move kanbans.

Kanban Sizing. The process of determining the number of kanban cards or items per container required to manage production. Sizing is based on demand calculations performed previously.

Last Delivery. In the Min/Max view, these columns indicate the quantity, date, and time of the last delivery received by the customer.

Minimum and Maximum. The customer, usually in cooperation with the supplier, sets the minimum and maximum target values for item inventory. In the Min/Max view, the color of the cells in the status columns indicates the level of item inventory relative to the defined minimum and maximum.

Move Card. A kanban card authorizing the movement of component materials from a storage location to the supermarket site.

Next Delivery. In the Min/Max view, these columns show the quantity, date, and time of the next delivery. Clicking on the QTY or Date/Time fields provides the details of the next shipment and any other outstanding shipments.

Nonadmin User. Nonadmin users do not have access to the administration functions through the Admin tab. Each customer or supplier company can have multiple nonadmin users but only one admin user. Customer admin users define nonadmin users in Admin » Customer » Users. Supplier admin users define nonadmin users in Admin » Supplier » Users.

Order Point. When the number of full kanbans in a loop falls below the order point, it triggers delivery of full kanbans from the supplying source.

Poller. The poller is a small UNIX and Java program installed on the customer's system. It periodically establishes connections with www.MFGx.net, delivers instructions from that site to the customer's system for extracting QAD Supplier Portal data from the customer's database, and sends that data to the QAD Supplier Portal database.

Poller Account. A poller account ID—poller user name and poller password—is required for each ERP database or data source exporting data to QAD Supplier Portal. QAD defines the poller account ID during the subscription process.

Replenishment Card. A kanban card authorizing the production of component materials.

Size. The number of components in each kanban.

SKU. Stock Keeping Unit. Equivalent to a part or item.

Supermarket ID. The ID for the supermarket that consumes kanban items.

Supermarket Site. The ID for the site where the supermarket that consumes kanban items is located.

Supplier. The producer of an item. QAD Supplier Portal assumes that there is a single supplier for an item/site pair—that is, there may be more than one supplier, but there is only one supplier for an item at a site. QAD Supplier Portal also assumes that the supplier is in charge of replenishment for the item.

Supplier Schedules. Schedule-based purchase orders agreed to by both the supplier and the customer. This is also the name of the module within MFG/PRO that supports handling these documents.

Supply Chain. The processes linking supplier and customer companies from the initial raw materials to the ultimate consumption of the finished product. The functions within and outside a company that enable the value chain to make products and provide services to the customer.

Supplying Reference. Supplying reference is dependent on supplying source type. For suppliers, it is a purchase order ID. For inventory, it is the supplying supermarket ID. For a process, it is the process ID.

Supplying Source. The supplier ID when the supplying source type is a supplier or the site ID when the supplying source type is inventory or process.

TMS. QAD Transportation Management System.

UOM. Unit of Measure. (Also represented by UM.)

Variability Factor. A multiplier that limits or increases the amount of inventory in a supermarket in response to fluctuations in demand.

Variance. The Variance value for each row in the Time Phased views is the cumulative difference between demand and supply for the item.

Vendor Managed Inventory—VMI. For VMI, customers specify minimum/maximum inventory quantities and delivery requirements for item-sites. Suppliers—as the vendors—use this information, as well as purchase orders and supplier schedules released by the customer, to maintain inventory at the appropriate level.

QAD Supplier Portal visualizes supply for both VMI data and kanban data, using data type-specific working data sets and pollers. Kanban inventory is managed through pull replenishment—customers pull inventory from suppliers as needed—while VMI inventory is managed through push replenishment—suppliers push inventory to customers according to orders or schedules.

Voucher. A document conveying authority to pay an invoice and record all relevant details on the nature of the liability and the payment. Verifies invoiced items and quantities against a purchase order and receiving records prior to processing payment.

Working Data Set. The working data set is a customer-specified subset of the base data set in the QAD Supplier Portal database. The working data set specifies which item-sites each supplier can monitor. QAD Supplier Portal automatically updates the data associated with the item-site-suppliers in the working data set.

Customer Tasks

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Average Demand Maintenance

Use Admin » Company » Average Demand Maintenance to accept or reject newly calculated average demands. The screen displays only those new demands that are beyond the tolerance percentage specified for the average demand calculation in Admin » Company » Schedule/Initiate Calculation.

Note The New Average Demand field and check boxes are disabled when there is an average demand calculation in progress.

Refining the View

Use column sorting as well as the Filter and Display tabs to refine the view.

Sort by Column. Use the icons above the column labels to sort the values in the columns.

Filter and Display Tabs. Go to the Filter tab to specify the search criteria for selecting which items to include in the current Data subtab display. Go to the Display tab to specify which columns to include in the Data subtab display.

Creating Data Reports

Go to the Print tab to specify report definitions. Reports are based on the data available as a result of the Filter and Display tab refinements.

Column/Field Descriptions

Item ID. The item number, name, or code from the customer ERP system or other data source.

Note When this field is a link, clicking this link opens the Item Detail view.

Item Description. This is the item description from the ERP system or other data source.

Site. This ID is the number or code for the site from the customer ERP system or other data source.

Site Description. This is the name of the site or information about the site from the customer ERP system or other data source.

Buyer. The buyer for the item-site or, if not available, for the item.

New Average Demand. These most recently calculated average demands exceed the existing average demands by more than the tolerance percentage defined for the calculation in Admin » Company » Schedule/Initiate Calculation. Customer admin and consolidated customer admin users can edit this field.

Existing Demand. This is the average demand that is currently in the Supplier Portal database; it is updated in several ways:

- Automatically when a new average demand does not exceed the existing average demand by more than the tolerance %.
- Manually when users select the item-site and click Confirm New Average Demand.
- Manually when users select the item-site, enter a different value in New Average Demand, and click Confirm New Average Demand.

Tolerance %. This applies to average demand. After calculation, changes in demand that are within the tolerance percentage are written to the Supplier Portal database. Changes that are beyond the tolerance percentage must be manually accepted or rejected in Admin » Company » Average Demand Maintenance.

Note It is best not to enter a tolerance percentage the first time average demand is calculated; this allows all calculated average demands to be within tolerance.

Tasks

Accepting the Calculated Average Demands

- 1 Go to Admin » Company » Average Demand Maintenance.
- 2 Use the Filter and Display tabs to display the item-sites of interest.
- 3 On the current page, indicate the new average demands to accept: select individual item-sites or click Select All.
- 4 Click Confirm New Average Demand to copy the selected new average demand values to the Existing Average Demand column and set the New Average Demand column to zero.
- 5 Repeat for each page.

Manually Updating Average Demands

- 1 Go to Admin » Company » Average Demand Maintenance.
- 2 Use the Filter and Display tabs to display the item-sites of interest.
- 3 On the current page, manually update the calculated new average demand values as needed.
- 4 Indicate the updated new average demands to accept: select individual item-sites or click Select All.
- 5 Click Confirm New Average Demand to copy the selected new average demand values to Existing Average Demand and set New Average Demand column to zero.
- 6 Repeat for each page.

Retaining the Existing Average Demands

- 1 Go to Admin » Company » Average Demand Maintenance.
- 2 Use the Filter and Display tabs to display the item-sites of interest.
- 3 On the current page, indicate the existing average demands to retain: select individual item-sites or click Select All.
- 4 Click Keep Existing Average Demand to retain the existing average demand values and set New Average Demand column to zero.
- 5 Repeat for each page.

Data Reports for Graphs

After displaying a graph, you have the option to create a report for viewing or saving.

The format of the report is determined by the following fields.

Title. Title is used only in PDF-format reports.

File Name. File name is used when saving reports. The default is report.file-type-extension.

Format. Supplier Portal creates reports in Acrobat PDF, comma-separated values (CSV), or symbolic link (SLK) format.

In CSV format, numbers are stored as numeric values even in text fields; for example, if a site ID is 002, the leading zeros are removed and the ID is stored as the numeric value 2 in the Site text field.

Note: The delimiter specified on the Preferences subtab of the User tab in Admin » User Maintenance determines whether you can open CSV-format reports directly or only save them.

In SLK format, values—numbers, quantities, dates, times—are formatted according to the language specified in Control Panel » Regional and Language Options. Additionally, numbers can be stored as text or numeric values in text fields. The default in Excel is text values.

To accept the default, go to the Error Checking tab in Tools » Options to disable the Number Stored as Text error checking rule.

To make the storage choice for cells individually, enable the error checking rule. In the report, each cell with a numeric value stored as text is marked in the upper left corner with a green triangle. Select a cell to display the Trace Error icon. Highlight the icon and click the arrow to display the menu; select Convert to Number.

Orientation. Supplier Portal can generate PDF-format reports in portrait or landscape orientation. Orientation applies to only PDF-format reports.

After generating a graph, use these steps to produce a report showing the values used in the graph:

- Click Export to display the report dialog.
- Make entries and select options as desired. For field details, see the table.
- Click Run to open the File Download dialog.
- Select Open or Save; then, click OK.

Acrobat PDF files open in Adobe Acrobat. CSV and SLK files open in Microsoft Excel if it is present; if not, the system prompts the user for an application to use.

Data Reports for Views

Data reports for the views are available from the Print tab in Min/Max, Kanban Board, Orders, and so on.

The format and content of the report are determined by the settings on the Display and Filter tabs and the following fields.

Title. Title is used only in PDF-format reports.

File Name. File name is used when saving reports. The default is report.file-type-extension.

Format. Supplier Portal creates reports in Acrobat PDF, comma-separated values (CSV), or symbolic link (SLK) format.

In CSV format, numbers are stored as numeric values even in text fields; for example, if a site ID is 002, the leading zeros are removed and the ID is stored as the numeric value 2 in the Site text field.

Note The delimiter specified on the Preferences subtab of the User tab in Admin » User Maintenance determines whether you can open CSV-format reports directly or only save them.

In SLK format, values—numbers, quantities, dates, times—are formatted according to the language specified in Control Panel » Regional and Language Options. Additionally, numbers can be stored as text or numeric values in text fields. The default in Excel is text values.

To accept the default, go to the Error Checking tab in Tools » Options to disable the Number Stored as Text error checking rule.

To make the storage choice for cells individually, enable the error checking rule. In the report, each cell with a numeric value stored as text is marked in the upper left corner with a green triangle. Select a cell to display the Trace Error icon. Highlight the icon and click the arrow to display the menu; select Convert to Number.

Orientation. Supplier Portal can generate PDF-format reports in portrait or landscape orientation. Orientation applies to only PDF-format reports.

Columns/Fields. Specify whether to include all possible fields or only those in the current display.

Pages. Specify whether to include all pages or only the currently displayed page.

Follow these steps to generate the report:

- 1 Go to the desired view.
- 2 Select data to include in the report.
 - Use the Filter tab to specify the search criteria for selecting which records to include in the Data tab display.
 - To include a subset of the available columns/fields, use the Display tab to specify which columns to include in the Data tab display.
 - Click the column labels in the Data tab display to sort the display rows for all pages by that column.
- 3 Use Display Rows to set the page size for the report.
- 4 Go to the Print » Report subtab.
- 5 Make entries and select options as desired. For field details, see the table.
- 6 Click Run to open the File Download dialog.
- 7 Select Open or Save; then, click OK.

Acrobat PDF files open in Adobe Acrobat. CSV and SLK files open in Microsoft Excel if it is present; if not, the system prompts the user for an application to use.

Supplier Maintenance

Customers in the Admin security group use Admin » Company » Supplier Maintenance to define and maintain suppliers and supplier admin accounts.

Tabs, Subtabs, and Fields

Supplier Tab

Click a supplier ID on the Search tab to access the Supplier tab.

Supplier

Supplier ID. This supplier business ID is loaded from the ERP system or other data source.

Company Name. The supplier company name defaults from the data source.

Business ID. The business ID is any identifying number such as a tax ID number; it defaults from the data source.

DUNS Number. The unique nine-digit data universal numbering system (DUNS) number with a four-digit suffix identifying a specific location within your company; for example, a distribution center or a store. DUNS numbers are issued by Dun & Bradstreet to North American businesses and act as a unique identifier for electronic data interchange (EDI) and global electronic commerce transactions.

Only standard customer, consolidated customer, and consolidated supplier accounts can modify their DUNS number through company maintenance. Any modification to the regular supplier account DUNS number has to be made by the customer in their system of records. The DUNS number is not validated in QAD Supplier Portal.

A supplier's DUNS number is loaded from the ERP system or from the duns.input file (if it exists in the poller directory). The duns.input file specifies the supplierID first and then the DunsNumber (separated by a comma). For example: 5001000,123456789. Note that each supplierID,DunsNumber combination is on a new line.

If the duns.input file does not exist, the DUNS numbers can be read from MFG/PRO for customers using version 8.6 and above. Customers using lower MFG/PRO versions and non-MFG/PRO customers who use OE*.input files will have to provide a duns.input file containing the supplier ID and their corresponding DunsNumber using the above mentioned format, creating a new attribute DunsNumber for the supplier element.

Company Size. Select the size of the supplier company from this drop-down menu. Options include 1-100 Employees, 101-1000 Employees, 1001-5000 Employees, 5001-10000 Employees, and More than 10000 Employees.

Revenue. Select the supplier annual revenue from this drop-down menu. Options include No Revenue, \$1-250,000,000, \$250,000,001-500,000,000, \$500,000,001-1,000,000,000, and More than \$1,000,000,000.

Product Capabilities. Select the industry sub-segment from this drop-down menu. The options displayed are dependent on the industry classification inherited from the customer of this supplier.

Image. The specified logo image is uploaded to the QAD Supplier Portal database and displays with the supplier name in the views and screens.

Status. When status is active, a supplier—and all of the accounts associated with the supplier—has access to QAD Supplier Portal.

Address

Company Name, Address, City, State, Postal Code, County, Country, Web Address. The displayed supplier company address information is from the data source and cannot be updated in QAD Supplier Portal.

Policies

ASN Ship-to Validation Policy. Specifies whether ASN header and line ship-to data must match.

QAD Supplier Portal uses the default policy set in Admin » Company » Company Maintenance unless an alternate policy is specified for a supplier in Admin » Company » Supplier Maintenance.

Export ASN Policy. Specifies whether ASNs that are imported or created manually in QAD Supplier Portal by suppliers should be exported from QAD Supplier Portal for importing to the ERP system.

QAD Supplier Portal uses the default policy set in Admin » Company » Company Maintenance unless an alternate policy is specified for a supplier in Admin » Company » Supplier Maintenance.

PO Acknowledge Policy. A PO Acknowledgment document is an electronic data interchange (EDI) document the supplier sends to the customer to acknowledge a new PO or a revision to an existing PO. The PO Acknowledge Policy setting specifies whether a supplier can edit the PO acknowledgment status once the PO Acknowledgment has been sent. For each supplier, if you do not want the supplier to be able to change the status after the PO Acknowledgment has been sent, set PO Ack Policy to Lock Acknowledgment. Setting PO Acknowledge Policy to Default specifies that the policy be the same as that for the company (customer), which is set on Admin » Company » Company Maintenance.

PO Reset Acknowledge Policy. A PO Acknowledgment document can specify a revision to an existing PO. As a customer, you might want a particular supplier to acknowledge each new revision to a PO. You can have QAD Supplier Portal reset the order acknowledgment status to Pending on a PO that has been revised in MFG/PRO, which will require the supplier to acknowledge the PO revision. To have QAD Supplier Portal reset the order acknowledgment status on a revised PO for a particular supplier, set PO Reset Acknowledge Policy to Reset Acknowledgment On New Revision. Setting PO Reset Acknowledge Policy to Default specifies that the policy be the same as that for the company (customer), which is set on Admin » Company » Company Maintenance.

Supplier Performance Export Policy. Specifies whether the supplier performance CIM file should be exported from QAD Supplier Portal.

QAD Supplier Portal uses the default policy set in Admin » Company » Company Maintenance unless an alternate policy is specified for a supplier in Admin » Company » Supplier Maintenance.

Invoice Visibility Policy. Specifies the invoice visibility policy for the supplier. If Default, the policy for the supplier is effectively the same as that for the company. If the policy is enabled (Enable Invoice Visibility) or set to Default, and the policy for the company is enabled, then the invoice, voucher, and payment data will be extracted from the ERP system. The poller server will pass the relevant information about the invoice visibility policy for each supplier to the poller client. Only the administrative user can view and change this field.

Supplier Create Draft Invoice Policy. Specifies whether the Draft Invoices feature is available for this supplier. If set to Default and Allow Supplier to Create Draft Invoice is enabled at the Customer level, this supplier can use Draft Invoices.

BOM Report Functionality. Specifies the BOM report functionality policy for the supplier. If Default, the policy for the supplier is effectively the same as that for the company. If the policy is enabled (Enable BOM Report Functionality) or set to Default, and the policy for the company is enabled, a supplier user will be able to access a BOM report from the ERP system. Only the administrative user can view and change this field.

Use Document Request. Specifies the document request policy for the supplier. If Default, the policy for the supplier is effectively the same as that for the company. If the policy is enabled (Allow Document Request) or set to Default, and the policy for the company is enabled, a supplier user can make document requests.

Memo Items Policy. Specifies the memo items policy for the company. If set to Do not upload memo items, the poller does uploads, but does not activate memo items to QAD Supplier Portal. If set to Upload memo items, the poller uploads and activates memo items in QAD Supplier Portal. If set to Default, the policy is inherited from the company policy.

Transport Labels Policy. Specifies the transport labels policy for the supplier. If Default, the policy for the supplier is effectively the same as that for the company. If the policy is enabled (Allow transport labels) or set to Default, and the policy for the company is enabled, a supplier user can create transport labels.

QAD TMS Policy. Specifies the QAD Transport Management System (TMS) policy for the supplier. You can either allow track and trace or not allow track and trace. As the supplier Admin user, by allowing track and trace you enable access to QAD TMS. Allowing track and trace makes available the Carriers field on the Supplier Maintenance - Preferences page.

Supplier Auto Download Policy. Specifies the auto download policy for the supplier. This downloading function automatically exports new and net changes to Schedules and POs from QAD Supplier Portal. Enabling Auto Download displays the Supplier Auto Download Configurations option on the Supplier tab. The default value is Auto Download not allowed. See “Auto Download Installation” for information on installing Auto Download.

Customer Auto Download Policy.

Note Auto download for customers must be enabled through an EDI services engagement. It is not available without this services engagement.

Specifies the auto download policy for the company. This downloading function automatically exports new and net changes to Schedules and POs from QAD Supplier Portal. Enabling Auto Download displays the Customer Auto Download Configurations option on the Company tab. The default value is Auto Download not allowed.

See “Auto Download Installation” for information on installing Auto Download.

Auto Download Configuration

Note Auto Download Configuration options appear only if the Auto Download Policy has been enabled for this company or supplier.

Auto Download Interval. Specifies the interval at which auto downloading should occur: Daily, Weekly, Monthly (Start of Month), or Monthly (End of Month)

With Daily, a menu to specify the hour when the download should occur displays.

With Weekly, a menu to specify the day when the download should occur displays.

Timezone. Specifies the timezone for auto downloading. This will usually be your own timezone.

Preferences

Company Name. The supplier company name defaults from the data source.

Transport Labels. The transport label types available for the supplier, as specified by the company.

Selected Labels. The transport label types selected by the supplier from the available transport label types listed in Transport Labels.

Carriers. Lists the supplier's available transport carriers for use with QAD TMS, which supports logistics track and trace. When you select a carrier and click Save, the Selected Carriers field displays and lists the selected carriers.

Selected Carriers. Lists the supplier's selected transport carriers for use with QAD TMS, which supports logistics track and trace.

Admin Account Tab

This tab can be accessed only from the Supplier tab.

Name

User ID. The initial admin account user ID defined here for a supplier company belongs to the supplier admin security group. Users logging in on this account can define admin and non-admin users for the supplier company in User Maintenance. Once this ID has been defined, it becomes a display-only field that cannot be modified.

First, Middle, Last, Title. The name of the user assigned to the supplier admin account can be modified.

Time Zone. When time zone is set for a supplier, QAD Supplier Portal displays it in the three-letter format with dates/times that are entered with a time zone. Times entered for other time zones are adjusted to the supplier's time zone.

If time zone is not set for a supplier, QAD Supplier Portal displays dates/times with the entered time zone.

Address

Name, Address, City, State, Postal Code, County, Country, Web Address. Street and Web address information for the user assigned to the supplier admin account. By default, the address information is the address information of the supplier company. For reference, the address information for the supplier company is also included on the Supplier tab.

Note The Country field may not be left blank.

Contact Info

Work Phone, Home Phone, Mobile Phone, E-mail, Fax, Pager, SMS. For each contact mode—phone, fax, and so on—specify the applicable days and times.

With regard to Alerts notifications, you can have multiple overlapping contact modes. However, to ensure that no notifications are lost, it is best to have an e-mail address that is always accessible.

Security

Name. The name of the user currently assigned to the supplier admin account as defined on the Name subtab.

Password for Name. The current user's password.

New Password/Confirm New Password. Updated password for the supplier admin account. Changing the password for the initial supplier admin account for a supplier company does not affect the other admin and nonadmin accounts for that supplier.

New PIN Number/Confirm New PIN Number. Updated PIN number for accessing alert notifications

Search Tab

Subtab	Description
Data	Records displayed as specified on the Filter and Display subtabs. Click the column labels to sort the data rows.
Filter	Use the Filter subtab to specify the search criteria for selecting which records to include in the Data subtab display.
Display	Use the Display subtab to specify which columns to include in the Data subtab display.

Define and Maintain Supplier Accounts

Maintain information for the supplier and for the supplier admin account.

- 1 Go to Admin » Company » Supplier Maintenance.
- 2 On the Search tab, use the Filter and Display subtabs as shown in the Search Tab table to refine the list of suppliers displayed on the Data subtab.
- 3 On the Data subtab, click a supplier ID to open a supplier record on the Supplier tab.
- 4 On the Supplier tab, enter or update data as required. For field details, see the Supplier Tab table.

- 5 Click Save.
- 6 On the Admin Account tab, enter or update data as required. For field details, see the Admin Account Tab table.
- 7 Click Save.

Enable and Select Transport Labels for Suppliers

Once you have enabled transport labels using Admin » Company » Company, you can enable and select transport label printing for individual suppliers as follows:

- 1 Go to Admin » Company » Supplier Maintenance.
- 2 Click a Supplier ID link.
- 3 Go to the Preferences subtab for the supplier.
- 4 Transport Labels lists the available label types. By default, the label types available are the labels previously selected in Company Maintenance. Selected Labels lists the label types selected for this supplier. To change the selected label types, select the label types from Transport Labels. You can select more than one label type by holding the Ctrl key as you select label types.
- 5 Click Save.
- 6 Go to the Policies subtab for the supplier.
- 7 In the Transport Label Policy field, the supplier transport label policy is Default, which specifies that the supplier policy is the same as the company policy. Typically, you should use the Default setting. However, you can set the field to Allow transport labels (or Do not allow transport labels).
- 8 Click Save.

Enable Track and Trace for Suppliers

Once you have enabled track and trace using Admin » Company » Company, you can enable track and trace for individual suppliers as follows:

- 1 Go to Admin » Company » Supplier Maintenance.
- 2 Click a Supplier ID link.
- 3 Go to the Policies subtab for the supplier.
- 4 Set the QAD TMS Policy field to Allow Track and Trace.
- 5 Click Save.
- 6 Go to the Preferences subtab for the supplier.
- 7 From the list, select the carriers you want the supplier to use.
- 8 Click Save. The selected carriers are listed in the Selected Carriers field.

Reference

Supplier Status. Set supplier status on Supplier tab » Company subtab. When the status is active for a supplier, all accounts associated with that supplier have access to QAD Supplier Portal.

When the status is changed to inactive, after 30 days QAD removes the supplier-associated data from the QAD Supplier Portal database. To prevent the data removal, reactivate the supplier before the 30 days elapse.

Transport Label Print

Only fields applicable for the transport label type are active. Where possible, defaults are supplied from the ASN.

Click Save to save the entered information. Click Print to generate the label in PDF format and then print the PDF on your printer.

ASN Number. A unique identifier for the advanced shipping notice.

PO Number. This is the purchase order number from the ERP database.

Packing Slip Number. This is the packing slip number.

Receiver. This is the receiver identifier.

Dock/Gate. This identifies the buyer's final delivery point (Ship-To field on the PO).

Customer Item ID. This is the customer item identifier.

Description. This is the buyer's part description.

Quantity. This is the number of items. The quantity on the master label should equal the sum of the quantities of all line item package labels.

Net Wt. This is the material weight within the transport unit.

Gross Wt. This is the total transport unit weight.

Number of Packages. This is the number of packages in the shipment.

Date. This is the delivery date.

Serial. This is the supplier package or transport unit identification number.

Supplier Addr. This is the supplier address, which includes the supplier's name, address, and country or origin. Note that it is important for Odette labels to include the supplier's country of origin.

Supplier ID. This is the supplier identifier as defined by the customer.

Supplier Item ID. This is the supplier item identifier.

Eng Change. This is the engineering change order identifier.

UM. This is the unit of measure.

Batch Number. This is the supplier's identifier for the batch of produced parts or AQP mark for assured quality parts.

Date Indicator. This specifies the date type: P indicates production date, D indicates delivery date, and U indicates usage date.

Serial Indicator. This specifies the serial number type: S indicates single label, M indicates master label, and G indicates mixed load label.

Transport Labels View

The Transport Labels view displays information for creating and editing transport labels for ASNs.

Creating Transport Labels

In the Transport Label view, you can create new labels as follows:

- 1 Click the Search tab if it is not already selected.
- 2 From the Transport Labels field, select a transport label type.
- 3 Click New Transport Label to create a new transport label.
- 4 In the Transport Label tab's Transport Label Print section, enter the required information in the fields for the label type.
- 5 Click Save to save the entered information.
- 6 Click Print to generate the label in PDF format and then print the PDF on your printer.

Editing Transport Labels

In the Transport Label view, you can edit existing labels as follows:

- 1 Click the Search tab if it is not already selected.
- 2 Review the existing labels, which are listed in rows. Note that you can control how many rows are displayed at a time with the Display pull-down menu. You can step through the displayed labels by using the First, Prev, Next, and Last buttons.
- 3 For the label you want to edit, click on one of the active column links, such as the entry for Label ID, Serial Indicator, or Serial.
- 4 In the Transport Label tab's Transport Label Print section, enter the required information in the fields for the label type.
- 5 Click Save to save the entered information.
- 6 Click Print to generate the label in PDF format and then print the PDF on your printer.

Consolidated Organizations

A consolidated organization account displays data from the standard organization accounts that are linked to it. Using consolidated accounts, customers can consolidate the data from multiple ERP systems into one view and suppliers can consolidated the data for multiple customers into one view.

Tabs and Fields

Organization Tab

Organization ID. For customer companies, the company ID defaults from the subscription form. For supplier companies, it defaults from the data source.

Organization Business ID. This field shows the business ID for the consolidated account and for all of the linked customer or supplier accounts.

Customers and suppliers set their business IDs in Admin » Company » Company Maintenance in their respective non-consolidated accounts. The customer business ID defaults from the Supplier Portal subscription form; the supplier business ID defaults from the supplier identifying number or ID code that is loaded in Supplier Portal from the customer's ERP system or other data source.

Consolidated account owners set the business ID for the consolidated account in Admin » Company » Company Maintenance in the consolidated account. They can also update the business ID for any of the linked accounts.

Organization Name. For customer companies, the company name defaults from the subscription form. For supplier companies, it comes from the data source.

Remove button. Use this button to remove the link between an organization and a consolidated organization.

Search Tab

Data. Records displayed as specified on the Filter and Display subtabs. Click the column labels to sort the data rows.

Filter. Use the Filter subtab to specify the search criteria for selecting which records to include in the Data subtab display.

Display. Use the Display subtab to specify which columns to include in the Data subtab display.

Tasks

Setting up a Consolidated Account

Users defined for a consolidated organization account can see the data for all of the standard organization accounts that are linked to the consolidated account.

- 1 Log in to a standard—non-consolidated—QAD Supplier Portal admin account.
- 2 Go to Admin » Company » Consolidated View Account to launch the subscription wizard.
- 3 Complete each page of the subscription to define the account and the main admin user for the account. Ignore those fields that are marked as not relevant to consolidated accounts.
- 4 Log in to the consolidated account.
- 5 Go to Admin » Company » User Maintenance to define user accounts for the consolidated organization account.

Linking an Organization

- 1 Log in to the consolidated account.
- 2 Go to Admin » Company » Consolidated Organization.
- 3 Follow these steps for each standard organization that you want to add to the consolidated organization:
 - a Click the Add Link button.
 - b Enter the user ID and password for the master admin user of one of your standard organization accounts that you wish to group under your consolidated account.
 - c Click the Add button.
 - d Verify that the organization you wanted to link appears in the list of linked organizations on the Search tab.

Removing a Linked Organization

If you want users of a consolidated subscription to cease to see the data of a given subscription, perform the following steps to remove a standard subscription from a consolidated subscription:

- 1 Go to Admin » Company » Consolidated Organization.
- 2 Verify that the Search tab is the active tab.
- 3 Review the list of linked organizations, and find the organization that you wish to remove from the consolidated organization.
- 4 On the row that lists the organization you want to unlink, follow the link on the Organization ID field.
- 5 Verify that the Organization tab is now active.
- 6 Click the Remove button.

- 7 Verify that the Search tab is now active, and that the organization you want to unlink is no longer in the list of linked organizations.

Canceling Your QAD Supplier Portal Subscriptions

Use Admin » Company » Cancel Subscription to cancel an QAD Supplier Portal subscription; this screen includes the cancellation terms.

- 1 Go to Admin » Company » Cancel Subscription.
- 2 Select a reason from the Reason box.
- 3 Enter any additional comments in the Comment field.
- 4 Review the terms.
- 5 Click I accept.

Schedule and Initiate Calculations

Use Admin » Company » Schedule/Initiate Calculation to create, initiate, schedule, and maintain named calculations.

- The definitions include the specific calculations—average demand, minimum, maximum, order point—as well as the item-sites and buyers that they should be applied to.
- For average demand calculations, include a range of templates and the tolerance percent.
- Scheduled calculations also include the frequency, day, time, and time zone for executing the calculation.

Note Only records for scheduled calculations are displayed on the Search tab. Records for initiated calculations are not displayed on the Search tab since they are deleted once they have been executed in the next hourly or five-minute update of the working data set.

Tabs, Subtabs, and Fields

Calculation Tab

Action. Initiate a calculation launches the selected calculation in the next hourly or five-minute poller update of the working data set.

Schedule a calculation launches the calculation according to the specified frequency, day, time, and time zone. Scheduled calculations are done during the hourly poller update of the working data set.

Disable a calculation prevents the execution of scheduled calculations.

Customer Business ID. This field is relevant only for consolidated accounts with multiple linked customer accounts. The customer business ID—set by the customer in Admin » Company » Company—differentiates data for the same customer from multiple ERP systems, databases, or data sources.

The default is the customer identifying number or ID code from the subscription form.

Frequency. Specify whether to schedule the event daily or weekly.

Day. Specify the day of the week for a weekly scheduled event.

Time. Specify the time of day for the scheduled event.

Time Zone. Specify the time zone for the scheduled event. This is required for daily auto load.

Calculation ID. This is the identifier for a defined calculation.

Calculation Type. There are these options for calculation type:

- Average demand, minimum, maximum, and order point
- Average demand only
- Minimum, maximum, and order point only

Average demand is used in the minimum, maximum, and order point calculations—so be sure to schedule or initiate one of the choices that includes it before scheduling/initiating the option that includes only minimum, maximum, and order point.

From-To Item. These are the first and last items in the range of items to be processed.

From-To Site. These are the first and last sites in a range of sites. Items to be processed must be associated with one of the sites in this range.

From-To Buyer. These are the first and last buyers in a range of buyers. Items to be processed must be associated with one of the buyers in this range.

From-To Template. These are the first and last templates in a range of average demand templates. Items to be processed must have one of the templates in this range assigned.

Tolerance %. This applies to average demand. After calculation, changes in demand that are within the tolerance percentage are written to the Supplier Portal database. Changes that are beyond the tolerance percentage must be manually accepted or rejected in Admin » Company » Average Demand Maintenance.

Note It is best not to enter a tolerance percentage the first time average demand is calculated; this allows all calculated average demands to be within tolerance.

Search Tab

This tab displays the scheduled calculation records.

Data. Records displayed as specified on the Filter and Display subtabs. Click the column labels to sort the data rows.

Filter. Use the Filter subtab to specify the search criteria for selecting which records to include in the Data subtab display.

Display. Use the Display subtab to specify which columns to include in the Data subtab display.

Calculation Maintenance Tasks

Define New Calculations

Defined calculations are listed on the Search tab, Data subtab.

- 1** Go to Admin » Company » Schedule/Initiate Calculation.
- 2** Click New Calculation to display the Calculation Tab.
- 3** In the Action field, specify when the calculation should be executed:
 - Choose Schedule a calculation to have the calculation executed in an hourly poller update of the working data set, according to the specified frequency, day, time, and time zone.
 - Choose Initiate a calculation to have the calculation executed in the next five-minute or hourly poller update of the working data set.
- 4** Set the calculation parameters using the information from the Calculation Tab table, then click Save.

Maintain Existing Calculations

- 5** Go to Admin » Company » Schedule/Initiate Calculation.
- 6** Use the Filter and Display subtabs as shown in the Search Tab table to refine the display on the Data subtab.
- 7** On the Data subtab, click a calculation ID link to open that record on the Calculation tab.
- 8** Update the calculation record using the information from the Calculation Tab table, then click Save.

Suspend Scheduled Calculations

Follow these steps to prevent the execution of scheduled calculations. The calculation record remains in the list of defined calculations and can be scheduled for execution again.

- 1** Go to Admin » Company » Schedule/Initiate Calculation.
- 2** Use the Filter and Display subtabs as shown in the Search Tab table to refine the display on the Data subtab.
- 3** On the Data subtab, click a calculation ID link to open that record on the Calculation tab.
- 4** In the Action field, choose Disable a calculation, then click Save.

Demand Calculation Template

Use Admin » Company » Demand Calculation Template to define templates, with various parameter settings, for demand calculations. This screen is available to customer admin and consolidated customer admin users.

Demand templates are specified for the following:

- When scheduling or initiating an average demand calculation in Admin » Company » Schedule/Initiate Calculation
- When defining company defaults on the Policies subtab in Admin » Company » Company
- When defining item policies in Admin » Company » Item —Item tab, Policies subtab

Tabs, Subtabs, and Fields

Demand Calculation Template Tab

Customer Business ID. This field is relevant only for consolidated accounts with multiple linked customer accounts. The customer business ID—set by the customer in Admin » Company » Company —differentiates data for the same customer from multiple ERP systems, databases, or data sources.

The default is the customer identifying number or ID code from the subscription form.

Template ID. The template specifies the number of actual history days and the number of forecast days to use in calculating the average demand. A template can be attached to any number of item-sites; a default template can be specified as a company policy.

Historical Days. This is the number of days before today to include in the calculation. The valid values are 0 to 365. Historical days and future days cannot both be zero.

Daily Usage = (QOH for DATE - 1) + (Receipts - QOH for DATE)

Future Days. This is the number of future days to include in the calculation. The valid values are 0 to 365. Historical days and future days cannot both be zero.

Daily Usage = Forecast or Scheduled Quantity for DATE

Ignore Current Week Forecast in Calculation. Select to eliminate the current week from the daily usage total for future work days.

Ignore Zero Usage History/Forecast Weeks in Calculation. Select to eliminate from the calculation any weeks where the quantity for all days is zero.

Include Site/Holiday Calendars in Calculation. Select to use the Site and Holiday calendars to identify historical and future workdays to use in calculating the average demand. If this is not selected, all days—not just work days—are counted for historical days and future days.

Search Tab

Data. Records displayed as specified on the Filter and Display subtabs. Click the column labels to sort the data rows.

Filter. Use the Filter subtab to specify the search criteria for selecting which records to include in the Data subtab display.

Display. Use the Display subtab to specify which columns to include in the Data subtab display.

Demand Calculation Template Tasks

Define Demand Calculation Templates

Defined templates are listed on the Search tab, Data subtab.

- 1 Go to Admin » Company » Demand Calculation Template.
- 2 Click New Template to display the Demand Calculation Template Tab.
- 3 Enter the template ID and description.
- 4 Enter the number of historical and future days to use in the calculation.
- 5 Select the remaining fields using the information from the Demand Calculation Template Tab table, then click Save.

Update Demand Calculation Templates

- 1 Go to Admin » Company » Demand Calculation Template.
- 2 Use the Filter and Display subtabs as shown in the Search Tab table to refine the display on the Data subtab.
- 3 On the Data subtab, click a template ID link to open that record on the Demand Calculation Template tab.
- 4 Update the template record using the information from the Demand Calculation Template Tab table, then click Save.

Contacts Maintenance

Use Admin » Company » Contact Maintenance to maintain names, addresses, and contact details for contacts that do not have QAD Supplier Portal user accounts.

Use Admin » Company » User Maintenance to maintain contact information for both customer and supplier QAD Supplier Portal users.

Use Admin » Company » Supplier Maintenance to maintain contact information for suppliers.

Security Group Availability. This menu item is available to only customer admin and supplier admin users.

Tabs, Subtabs, and Fields

Contact Tab

Name

First, Middle, Last, Title. Contact name and title.

Address

Address, City, County, State, Country, Postal Code, Web Address. Street and Web address information.

Contact Info

Work Phone, Home Phone, Mobile Phone, E-mail, Fax, Pager, SMS, Alert Email. For each contact mode—phone, fax, and so on—specify the appropriate information.

To ensure that no Alerts notifications are lost, have an e-mail address that is always accessible.

Search Tab

Data. Records displayed as specified on the Filter and Display subtabs. Click the column labels to sort the data rows.

Filter. Use the Filter subtab to specify the search criteria for selecting which records to include in the Data subtab display.

Display. Use the Display subtab to specify which columns to include in the Data subtab display.

Contacts Maintenance Tasks

Create and Maintain Non-User Contact Records

- 1 Go to Admin » Company » Contact Maintenance. This displays the Search tab.
- 2 Specify a contact:
 - For new contacts, click New Contact to open the Contact tab.
 - For existing contacts, use the Filter and Display subtabs on the Search tab to refine the list of names displayed on the Data subtab, then click the desired contact name link to open the Contact tab.
- 3 On the Name subtab, enter or update the information, then click Save.
- 4 Proceed to the other subtabs as shown in the Contact Tab table, enter values, and click Save.
- 5 To define additional new contacts, return to the Name subtab, click New, then complete the Name and Contact Info subtabs for each contact.

Maintaining Working Data Set Membership

Use Working Data Set - VMI and Working Data Set - Kanban on the Admin » Data Management » Data Setup menu to interactively maintain the VMI and kanban working data sets, respectively. You can also maintain the VMI data set through a working data set (WDS) file.

For VMI data, the working data set is a subset of the item-site-supplier associations in the base data set that is loaded from the ERP database. The VMI inventory views—Min/Max, Time-Phased—display only this subset of item-site-suppliers.

For kanban data, the working data set is a subset of the kanban loops available in the ERP database. By default, all loops are members of the working data set. The kanban inventory views—Board, Loop, Card—display only this subset of loops.

Note For accurate data maintenance in QAD Supplier Portal, an item can be a member of only one working data set; that is, an item can be updated as a member of either the VMI working data set or the kanban working data set but not both simultaneously.

Views such as Orders and Receipts display the business data for only the kanban loops or VMI item-site-supplier associations in the respective working data sets. The poller automatically updates only the kanban loops or VMI item-site-supplier associations in the respective working data sets.

Security Group Availability. These menu items are available to only customer admin users.

Data, Filter, Display

Use the Filter and Display tabs as well as sorting by column to organize the data.

Data. Records displayed as specified on the Filter and Display subtabs. Click the column labels to sort the data rows.

Filter. Use the Filter subtab to specify the search criteria for selecting which records to include in the Data subtab display.

Display. Use the Display subtab to specify which columns to include in the Data subtab display.

Print

Use the Print tab to print a report to a file. The report can be saved in PDF, SLK, or PDF formats.

Interactively Maintain the Kanban WDS

Specify which loops to include in the kanban WDS, the default is all loops.

- 1 Go to Admin » Data Management » Data Setup » Working Data Set - Kanban.
- 2 Use the Filter and Display tabs to refine the list of loops displayed on the Data tab.
- 3 Use mouse clicks as well as the Select All and Unselect All buttons to select the loops from only the current page.
- 4 Click Save.
- 5 For each subsequent page, select loops and click Save.

Interactively Maintain the VMI WDS

Specify which item-site-suppliers to include in the VMI WDS, there is no default.

- 1 Synchronize the VMI base data set with the ERP database:
 - a Check that the file `bulk.ips.input` is not in the poller directory; it would limit the loading to only those item-site-suppliers that are in the current WDS.
 - b Use Admin » Data Management » Data Setup » Manual Data Load to load all items, sites, and suppliers from the ERP database.
- 2 Go to Admin » Data Management » Data Setup » Working Data Set - VMI.
- 3 Use the Filter and Display tabs to refine the list of item-site-suppliers displayed on the Data tab.
- 4 Use mouse clicks as well as the Select All and Unselect All buttons to select the item-site-suppliers from only the current page.
- 5 Click Save.
- 6 For each subsequent page, select item-site-suppliers and click Save.

Select VMI WDS Display Based on Status

You can set the status of individual item-site-supplier rows as Active, Rejected, or Inactive and then control the display of item-site-supplier rows based on status.

Each item-site-supplier row includes a checkbox in the first column. Using this checkbox and the Activate Selected, Reject Selected, and Inactivate Selected buttons at the bottom of the screen, you can control the status of each item-site-supplier row. You can then specify which item-site-supplier rows display by setting the Filter tab's Status field in the Currently Displayed section.

To set the status of individual item-site-supplier rows as Active:

- 1 For each item-site-supplier row whose status you want to set as Active, click the checkbox in the first column of the row.
- 2 At the bottom of the screen, click the Activate Selected button. In the Status column, the rows you selected now include the Active icon () , indicating that the item-site-supplier is active.

To set the status of individual item-site-supplier rows as Rejected:

- 1 For each item-site-supplier row whose status you want to set as Rejected, click the checkbox in the first column of the row.
- 2 At the bottom of the screen, click the Reject Selected button. In the Status column, the rows you selected now include the Rejected icon () , indicating that the item-site-supplier is rejected.

To set the status of individual item-site-supplier rows as Inactive:

- 1 For each item-site-supplier row whose status you want to set as Inactive, click the checkbox in the first column of the row.
- 2 At the bottom of the screen, click the Inactivate Selected button. In the Status column, the rows you selected now include the Inactivate icon (❌), indicating that the item-site-supplier is inactivated.

To set the display filter based on item-site-supplier status:

- 1 Go to the Filter tab.
- 2 For Status in the Currently Displayed section, select Inactive, Active, or Rejected. Leave Status blank (the default) to display item-site-supplier rows regardless of status.
- 3 Click Apply.
- 4 Go to the Display tab to view the item-site-supplier rows displayed based on status.

Manually Maintain the VMI WDS with a File

The poller must be set up to gather data from an MFG/PRO database, that is, it cannot be set up as an integration poller.

The loaded file replaces an existing working data set or creates a new one if one does not exist.

- 1 Review the file formats and validation criteria in the Reference section:
 - Flat file format
 - Validation and conversion
- 2 Create an appropriately formatted working data set file.
- 3 Place the file in the poller directory.
- 4 Go to Admin » Data Management » Data Setup » Manual Data Load.
- 5 Click Initiate Loading to load the item-site-suppliers specified in the file.

Automatically Maintain the VMI WDS with a File

The poller must be set up to gather data from an MFG/PRO database, that is, it cannot be set up as an integration poller.

The loaded file replaces an existing working data set or creates a new one if one does not exist.

- 1 Review the file formats and validation criteria in the Reference section:
 - Flat file format
 - Validation and conversion
- 2 Create an appropriately formatted working data set file.
- 3 Place the file in the poller directory.
- 4 Go to Admin » Data Management » Data Setup » Auto Data Load.

- 5 Click the poller user ID to go to the Auto Data Load tab.
- 6 Specify and enable the auto load schedule.

Automatically Activate New VMI Items in WDS

In Admin » Company » Company, use the policy Activate New VMI Items in WDS to specify whether new VMI items brought into QAD Supplier Portal through the bulk load process should automatically be selected as members of the VMI working data set. The default is No.

Note For accurate data, an item can belong to only one WDS and all items that are loaded by the kanban poller are always added to the kanban WDS. If both the VMI and kanban pollers are in use and this VMI policy is enabled, any items that are loaded by both pollers will be assigned to the kanban WDS since it has precedence.

VMI WDS and Deleted Purchase Orders

Deleting or archiving a purchase order in the ERP database does not remove the associated item-site-supplier records from the WDS in QAD Supplier Portal. Use Admin » Data Management » Data Setup » Working Data Set - VMI to remove the orphan records.

Load Process

For manual data load and auto data load, QAD Supplier Portal does the following:

- 1 The server sends the poller the instruction to load.
- 2 The poller checks the poller directory for the working data set files, `bulk.ips.input` and `bulk.supplier.input`.
- 3 If the `bulk.ips.input` file is present, the poller gathers data from the MFG/PRO database for only the items specified in the file.
- 4 If the `bulk.ips.input` file is not present but the `bulk.supplier.input` file is present, the poller gathers data from the MFG/PRO database for only the suppliers specified in the file.
- 5 The poller loads the data into the QAD Supplier Portal database.
- 6 QAD Supplier Portal defines or updates the working data set based on the `ACTIVATE_WORKING_DATASET` parameter.

File Format

The `bulk.ips.input` file

The `bulk.ips.input` working data set file contains item-site-supplier combinations and optional parameters. Place the completed file in the poller directory.

File Name. The file name must be `bulk.ips.input`.

Optional Parameters. The optional parameters specify the data delimiter and the effect of the loaded working data set file.

ACTIVATE_WORKING_DATASET. If the parameter is on the first line of the working data set file, there are several effects:

- If there is no working data set, the file creates one.
- If there is a working data set, any members associated with the poller that loads the file are deactivated and item-site-suppliers in the file are added to the existing working data set.
- There are no changes for working data set members that are not associated with the poller that loads the file.

If the parameter is not present on the first line of the working data set file—the default—the item-site-suppliers specified in the file are added to the base data set. Use Admin » Data Management » Data Setup » Define Working Data Set to add any of these item-site-suppliers to the working data set.

DELIMITER. The default delimiters are the tilde (~) and comma (.). Use this optional parameter to specify a single-character, non-zero delimiter. If the **ACTIVATE_WORKING_DATASET** parameter is used, put the **DELIMITER** parameter on the second line; otherwise, put it on the first line. This example sets the delimiter to the pipe character:

```
DELIMITER=|
```

Data Lines. Create the file in this format, with one item-site-supplier combination per line:

```
itemID~siteID~supplierID
```

Note For memo items, the item-site-supplier data line must have the following format:

```
itemID+itemDescription~siteID~supplierID~itemID
```

For inventory items, the item is the itemID but for memo items the item must be a concatenation of itemID and itemDescription.

If pod_part and pod_desc are non-blank, the format for memo items is:

```
pod_part+pod_desc~siteID~supplierID~pod_part
```

Example:

```
Item1Description1~Site1~Supplier1~Item1
```

If pod_part is non-blank and pod_desc is blank, the format for memo items is:

```
pod_part+pod_desc~siteID~supplierID~pod_part
```

Example:

```
Item1~Site1~Supplier1~Item1
```

If pod_part is blank and pod_desc is non-blank, the format for memo items is:

```
pod_desc~siteID~supplierID~pod_desc
```

Example:

```
Description1~Site1~Supplier1~Description1
```

The bulk.supplier.input file

The bulk.supplier.input file contains suppliers only. Place the completed file in the poller directory.

File Name. The file name must be bulk.supplier.input.

Data Lines. Create the file in this format, with one supplier per line:

```
supplierID
```

Optional Parameter. The PO_STATUS parameter specifies whether to read only open POs, closed POs, or canceled POs for a supplier.

- PO_STATUS= specifies to read only open POs.
- PO_STATUS=c specifies to read only closed POs.
- PO_STATUS=x specifies to read only canceled POs.

The bulkload process makes use of the PO Status value and loads those POs that have receipts or invoices falling within the history days regardless of the PO Status value.

Example 1. The following specifies to read only open POs for the supplier with the supplier ID msl:

```
PO_STATUS=      ms1
```

Example 2. The following specifies to read only closed POs for the supplier with the supplier ID msl:

```
PO_STATUS=c      ms1
```

Example 3. The following specifies to read only canceled POs for the supplier with the supplier ID msl:

```
PO_STATUS=x      ms1
```

File Examples

This example for bulk.ips.input does not have the optional parameters and uses the default tilde delimiter:

```
bolt02~10000~Supplier1
bolt03~10000~Supplier05
bolt04~10000~5001000
```

This example for bulk.ips.input deactivates the existing working data set then replaces the data set with the contents of this file; it uses the default comma delimiter:

```
Activate_Working_Dataset
bolt02,10000,Supplier1
bolt03,10000,Supplier05
bolt04,10000,b00100
```

This example for bulk.ips.input deactivates the existing working data set then replaces the data set with the contents of this file; it also defines the @ character as the delimiter:

```
Activate_Working_Dataset
DELIMITER=@
bolt02@10000@Supplier1
bolt03@10000@Supplier05
bolt04@10000@b00100
```


File Validation

To be successfully processed, the working data set file must pass these validations during the load process. Any error messages are written to delimiter.error in the poller directory:

- The user-specified delimiter cannot be a null or blank space.
Error: NULL delimiter not allowed.
Error: Blank/Space delimiter not allowed.
- The user-specified delimiter cannot be more than one character.
Error: Multiple character delimiter not allowed.

Delete Working Data Set VMI Records

You can delete a VMI record using the Working Data Set VMI Deletion screen. To access the screen, choose Admin » Data Management » Delete Records » Working Data Set - VMI.

To delete a working data set VMI record:

- 1 In the Working Data Set VMI Deletion screen, you can specify a set of VMI records within a range by setting the From-To Supplier, From-To Site, and From-To Item fields.
- 2 Select Type from the menu: Inventory, Memo, or blank. If the blank option is selected, both Inventory and Memo type items will be selected.
- 3 Select Status from the menu: Inactive, Active, Rejected, or blank. If the blank option is selected, all status (Inactive, Active, and Rejected) items will be selected.
- 4 Set Delete to yes if you want to delete at this time.
- 5 Set Print to yes if you want to print a report at this time. You can print a report before, during, or after a deletion.
- 6 If you set Print to yes, select the format and orientation of the report by setting the Format and Orientation fields. For example, you can generate a PDF with landscape orientation.
- 7 Click Run.
- 8 If printing, click OK in the Processing. Please Wait... pop-up window that appears.

Column/Field Descriptions

This table includes all columns/fields that are available on the screen.

Column/Field	Description
From-To Supplier	These are the first and last suppliers in a range of suppliers.
From-To Site	These are the first and last sites in a range of sites.
From-To Items	These are the first and last item values in a range of items.
Type	Select Inventory, Memo, or blank. If the blank option is selected, both Inventory and Memo type items will be selected.
Status	Select Inactive, Active, Rejected, or blank. If the blank option is selected, all status (Inactive, Active, and Rejected) items will be selected.

Column/Field	Description
Delete	Select yes to delete all working data set VMI records within the specified ranges.
Print	Select yes to print all working data set VMI records within the specified ranges.
Format	Select Acrobat PDF, comma-separated values (CSV), or symbolic link (SLK) format.
Orientation	Orientation applies only to PDF-format. QAD Supplier Portal can generate PDF files in portrait or landscape orientation.
File Name	Specify the file name.

Deleted Closed Purchased Orders

You can delete closed or canceled purchase orders (POs) using the Closed/Canceled POs Deletion screen. To access the screen, choose Admin » Data Management » Delete Records » Closed/Canceled POs.

POs can be deleted so long as they are not:

- Tied to an open ASN or unvouchered receipt
- Within the Invoice History Days Horizon
- Within the Receipts History Days Horizon
- Tied to an invoice that has not been paid or reconciled

To delete a closed or canceled PO:

- 1 In the Closed/Canceled POs Deletion screen, you can specify a set of POs within a range by setting the From-To Close Date, From-To Supplier, From-To Purchase Order, and From-To Ship To fields. Alternatively, you can set the Standard Orders field to yes and optionally set Schedule Orders to yes, which includes the POs tied to scheduled orders.
- 2 Set Delete to yes if you want to delete the POs at this time.
- 3 Set Print to yes if you want to print a report of the selected POs at this time. You can print a report before, during, or after a deletion.
- 4 If you set Print to yes, select the format and orientation of the report by setting the Format and Orientation fields. For example, you can generate a PDF with landscape orientation.
- 5 Click Run.
- 6 If printing, click OK in the Processing. Please Wait... pop-up window that appears.

Column/Field Descriptions

This table includes all columns/fields that are available on the screen.

From-To Close Date. These are the first and last dates in the range of close dates to be processed.

From-To Supplier. These are the first and last suppliers in a range of suppliers.

From-To Purchase Order. These are the first and last purchase orders in a range of purchase orders.

From-To Ship To. These are the first and last ship-to values in a range.

Standard Orders. Select Yes to delete (and/or print) the closed standard purchase orders--and their lines--in the specified range.

Schedule Orders. Select Yes to delete (and/or print) the closed scheduled orders with no associated active or inactive schedules in the specified range.

Delete. Select Yes to delete all closed purchase orders within the specified ranges and parameters.

Print. Select Yes to print all closed purchase orders within the specified ranges and parameters.

Format. Select Acrobat PDF, comma-separated values (CSV), or symbolic link (SLK) format.

Orientation. Orientation applies only to PDF-format. QAD Supplier Portal can generate PDF files in portrait or landscape orientation.

File Name. Specify the file name.

Delete Received and Canceled ASNs

You can delete a received ASN using the ASNs Deletion screen. To access the screen, choose Admin » Data Management » Delete Records » ASNs.

To delete a received ASN:

- 1 In the ASNs Deletion screen, you can specify a set of received ASNs within a range by setting the From-To Supplier, From-To ASN, and From-To Ship To fields.
- 2 Set Delete to yes if you want to delete at this time.
- 3 Set Print to yes if you want to print a report at this time. You can print a report before, during, or after a deletion.
- 4 If you set Print to yes, select the format and orientation of the report by setting the Format and Orientation fields. For example, you can generate a PDF with landscape orientation.
- 5 Click Run.
- 6 If printing, click OK in the Processing. Please Wait... pop-up window that appears.

Column/Field Descriptions

This table includes all columns/fields that are available on the screen.

From-To Supplier. These are the first and last suppliers in a range of suppliers.

From-To ASN. These are the first and last ASNs in a range of ASNs.

From-To Ship To. These are the first and last ship-to values in a range.

Delete. Select yes to delete all received and canceled ASNs within the specified ranges.

Print. Select yes to print all ASNs within the specified ranges.

Format. Select Acrobat PDF, comma-separated values (CSV), or symbolic link (SLK) format.

Orientation. Orientation applies only to PDF-format. QAD Supplier Portal can generate PDF files in portrait or landscape orientation.

File Name. Specify the file name.

Delete Closed Schedules

You can delete a closed schedule using the Closed Schedules Deletion screen. To access the screen, choose Admin » Data Management » Delete Records » Closed Schedules.

To delete closed schedules:

- 1 In the Closed Schedules Deletion screen, you can specify a set of closed schedules within a range by setting the From-To Purchase Order, From-To Supplier, and From-To Release ID, From-To Ship To, and From-To Active End Date fields.
- 2 Set Delete to yes if you want to delete at this time.
- 3 Set Print to yes if you want to print a report at this time. You can print a report before, during, or after a deletion.
- 4 If you set Print to yes, select the format and orientation of the report by setting the Format and Orientation fields. For example, you can generate a PDF with landscape orientation.
- 5 Click Run.
- 6 If printing, click OK in the Processing. Please Wait... pop-up window that appears.

Column/Field Descriptions

This table includes all columns/fields that are available on the screen.

From-To Purchase Order. These are the first and last purchase orders in a range of purchase orders.

From-To Supplier. These are the first and last suppliers in a range of suppliers.

From-To Release ID. These are the first and last release IDs in a range of release IDs.

From-To Ship To. These are the first and last ship-to values in a range.

From-To Active End Date. These are the first and last active end dates in a range of active end dates.

Delete. Select yes to delete inactive schedules their associated schedule order lines and schedule order details within the specified ranges.

Print. Select yes to print inactive schedules their associated schedule order lines and schedule order details within the specified ranges.

Format. Select Acrobat PDF, comma-separated values (CSV), or symbolic link (SLK) format.

Orientation. Orientation applies only to PDF-format. QAD Supplier Portal can generate PDF files in portrait or landscape orientation.

File Name. Specify the file name.

ASN Maintenance

Advance shipment notices (ASNs) notify customers that suppliers have shipped material. Suppliers use ASNs » ASN Maintenance to create and maintain ASN header and detail records in the QAD Supplier Portal database. Only suppliers can create or modify the contents of an ASN.

Customers use ASNs » ASN Maintenance to update the ASN status in the QAD Supplier Portal database. Customers have access to the Canceled, Shipped, and Received statuses. Customers maintain the ASN ship-to validation policy in Admin » Company » Company Maintenance.

In addition to maintaining ASNs, suppliers can use the Import button on the ASNs view to open the Import dialog for specifying an ASN file to import.

Note To use ASN functionality with kanban data, both the VMI and the kanban pollers must be installed and running.

Introduction

QAD Supplier Portal displays ASNs from multiple sources and, optionally, exports ASNs for loading into customer ERP systems.

The ASNs view displays only ASNs that have both header and detail records in the QAD Supplier Portal database. ASNs » ASN Maintenance displays all ASNs regardless of whether there are any line details in the QAD Supplier Portal database.

ASN Sources

QAD Supplier Portal supports ASNs from three sources to increase visibility of in-transit inventory:

ASNs created in customer ERP systems and loaded into QAD Supplier Portal by the poller.

For MFG/PRO, these ASNs are based on open and unreceived PO shippers created in response to ASNs received from suppliers. Other ERP systems may have different methods and criteria for generating these ASNs.

Only the status of these ASNs—incomplete, shipped, received—can be maintained in QAD Supplier Portal.

ASNs created interactively in QAD Supplier Portal by suppliers. Suppliers can manually create ASNs in response to customer inventory levels and POs or released supplier schedules. In MFG/PRO, the shipper ID from the ASN line must be used in the Shipper ID or Packing Slip field when processing receipts. Other ERP systems may have different methods and criteria for referencing these ASNs.

Suppliers can maintain all parts of these ASNs in QAD Supplier Portal; customers can maintain only the status.

ASNs imported into QAD Supplier Portal by suppliers. Suppliers can import ASN data in XML, CSV, or flat file format.

ASNs in the import file create new ASNs and update any ASN previously imported into QAD Supplier Portal by suppliers or manually created in QAD Supplier Portal by suppliers. ASNs in the import file can have a header status of incomplete, shipped, or received, and a detail status of open, incomplete, or received. Detail status can also be left blank.

QAD Supplier Portal generates an error if an ASN in the import file attempts to update an ASN originally loaded into the QAD Supplier Portal database by the customer's poller.

Suppliers can use the Import ASN Workbook—an Excel spreadsheet; see “Creating Flat Import Files with a Spreadsheet” on page 244—to create the import file manually or use a text editor and ASN data downloaded from their ERP system to create an appropriately formatted XML or flat file.

Suppliers can maintain all parts of these ASNs in QAD Supplier Portal; customers can maintain only the status.

ASNs loaded by a poller from an alternate source. In this case, the ASNs are loaded by a poller from a system that is not the ERP system but an EDI server or some other system implemented by the supplier.

Exporting ASNs for Tracking in ERP Systems

Customers can track all ASNs displayed in QAD Supplier Portal—regardless of source—in their ERP systems. ASNs that did not originate in an ERP system—that is, those created or imported into QAD Supplier Portal by suppliers—can be exported for loading into ERP systems.

To set up exporting, customers specify the target directory and file name for the ASNs as well as whether QAD Supplier Portal should export ASNs for some or all of their suppliers.

Once exporting is set up—by company or supplier—for ASNs that did not originate in the ERP system, QAD Supplier Portal exports those ASNs where the status is shipped and not previously exported. QAD Supplier Portal exports ASNs as frequently as every five minutes in conjunction with the ASNs and Receipts update of the working data set.

Note If the previous export file is still present in the target directory, QAD Supplier Portal adds the date and time to the file name to distinguish the new file.

The color of the shipped and received icons in the left column of the ASN view indicates the export status of the ASN: whether it has been exported to the ERP system and whether receipt has been confirmed in the ERP system.

ASN Status	Not Exported	Exported	Confirmed
Shipped			
Received			

In MFG/PRO, importing ASNs exported from QAD Supplier Portal is supported through the EDI E-Commerce module. Timing and frequency for importing the ASNs are governed by import controls set up for EDI E-Commerce. Regardless of ERP system, when an ASN is successfully received, the receipt is confirmed in QAD Supplier Portal with the next ASNs and Receipts update of the working data set.

For customers using other ERP systems, the following formatting resources are available to use in setting up your EDI system to import ASN files from the target directory:

- Standard
 - Exported ASN File Format
 - Exported ASN File Sample
- With Containers
 - Exported ASN SVN (With Containers) Sample
 - Exported ASN SVN (With Containers) Sample (Excel Workbook)

ASN Canceled Status

Users logged in as customers or consolidated customers can change the status for ASNs to Canceled in ASN. For example, this is useful when a supplier believes that there is a problem with a shipment or an ASN and asks for the change. The same users can change the status from Canceled to Shipped or Received when the situation that induced the status change has been addressed.

Note Changes to or from Canceled status apply to only the ASNs that suppliers create manually or import into QAD Supplier Portal.

All users can see ASNs with the status Canceled in the ASN view and in ASN Maintenance. For users logged in as suppliers, ASNs with the status Canceled are read-only in ASN Maintenance.

Changing the ASN status to Canceled has several effects:

- The in-transit quantity for the item represented by the ASN is reduced by the quantity in the ASN and the replenishment quantity is increased by the quantity in the ASN. Changing the status to Shipped reverses this effect.
- If this ASN is part of the next delivery, the next delivery date and quantity will change. Changing the status to Shipped reverses this effect.
- If at least one of the lines in the ASN is for a kanban-controlled item, QAD Supplier Portal displays a warning: Kanban card and loop status for loops covered by this ASN may now be out of sync.

ASN Mass Cancellation

You can cancel a group of ASNs using the Cancel ASN screen. To access the screen, choose ASN » Cancel ASNs.

ASNs can be canceled so long as they are:

- Maintained by supplier manually in QAD Supplier Portal
- Imported by supplier in QAD Supplier Portal
- Are no longer matched with receipts.

To cancel ASNs:

- 1 In the Cancel ASNs screen, you can specify a set of ASNs within a range by setting the From-To Supplier, From-To ASN, From-To Ship To and From-To Ship Date fields.
- 2 Set Cancel to Yes if you want to Cancel the ASNs at this time.

- 3 Set Print to Yes if you want to print a report of the selected ASNs at this time. You can print a report before, during, or after a cancellation.
- 4 If you set Print to yes, select the format and orientation of the report by setting the Format and Orientation fields. For example, you can generate a PDF with landscape orientation.
- 5 Click Run.
- 6 If printing, click OK in the Processing. Please Wait.. pop-up window that appears.

Column/Field Descriptions

The Mass Cancellation screen contains these columns and fields:

From-To Supplier. These are the first and last suppliers in a range of suppliers.

From-To ASN. These are the first and last ASN Numbers in a range of ASNs.

From-To Ship To. These are the first and last ship-to values in a range.

From-To Ship Date. These are the first and last dates in the range of ship dates to be processed.

Cancel. Select Yes to cancel all the ASNs within the specified ranges and parameters.

Print. Select Yes to print all the ASNs within the specified ranges and parameters.

Format. Select Acrobat PDF, comma-separated values (CSV), or symbolic link (SLK) format.

Orientation. Orientation applies only to PDF-format. QAD Supplier Portal can generate PDF files in portrait or landscape orientation.

File Name. Specify the file name.

ASN Tasks

Interactively Creating ASNs

Users logged in on supplier accounts can create ASNs in QAD Supplier Portal.

- 1 Review the validation criteria:
 - The unit of measure on the ASN must equal the UM on the PO line.
Error: UM entered in ASN um is not the same as PO Line UMum.
 - For kanban-controlled items shipped on ASNs, the ship quantity must be a multiple of the kanban quantity.
Error: Ship quantity quantity is not a multiple of kanban quantityKBquantity, please modify quantity to ship.
 - For kanban-controlled items shipped on ASNs, the supplier can ship a quantity only equal to or less than the number of unfilled kanban cards allowed.
Error: Insufficient number of cards available, contact customer.
 - For kanban-controlled items shipped on ASNs, the customer's database may not have the rounding threshold percent set properly. Only the customer can fix this problem.

Error: Rounding threshold percent percent is not the same in all the identified loops, contact customer.

- For kanban-controlled items shipped on ASNs, the customer's database may not have the quantity mismatch method set properly. Only the customer can fix this problem.

Error: Qty mismatch method is not the same in all the identified loops, contact customer.

- 2 Click Ordered Qty in the Orders view or CUM Qty in the Schedules view to open ASNs » ASN Maintenance.

- 3 Complete the ASN header data.

Note Once status is changed to Shipped, no changes are allowed to the content of the ASN; only the status can be updated.

- 4 Optionally, you can add additional lines if necessary. If only shipping one line, you skip this step.

- a To add new lines from a discrete order, follow the link labeled Add Lines from Discrete Orders. Discrete orders are those that appear in the Orders View.

To add new lines from scheduled orders, follow the link labeled Add Lines from Scheduled Orders. These links activate dialogs for discrete and scheduled orders, respectively.

To add new lines from a kanban order, follow the link labeled Add Lines from Kanban Cards.

- b The dialogs display open lines. To add a given line to your ASN, activate the check box to the left of the line.

You can select as many lines as you want.

- c Choose the Create ASN Lines button. This will add the lines to your ASN.

- d Use the Select All and Unselect All buttons to mark all lines for addition, or clear previously marked lines.

To dismiss the dialogs, without adding any lines to your ASN, choose the Close button.

- 5 Complete the ASN Lines data.

- 6 Optionally, you can drop an ASN line.

To drop an ASN line, choose the Remove icon (X), to the left of the Line field.

- 7 Optionally, enter Lot/Serial information. If you are not using lot numbers or serial numbers, you skip this step.

- a Enter lot or serial number information for each line in your ASN.

- b Choose the Detail button on a line that you want to update. This button activates the Lot/Serial Maintenance dialog.

- c The dialog lets you enter multiple lot/serial detail lines. Once you complete a line, use the tab key for an additional line. Kanban IDs can be specified if you are using QAD Supplier Portal with Kanban Visibility.

- d Complete the lot/serial detail line.

- e Optionally, you can drop a lot/serial detail line if you want to do so.

f To drop a lot/serial detail line, click on the Remove (X) icon to the left of the lot/serial field.

g Choose the OK button to dismiss the dialog.

Note The OK button does not save any of your work to the server. Only the Save button for the ASN saves your work to the server.

To dismiss the dialog without adding any lines to your ASN, choose the Close button.

Creating Flat Import Files with a Spreadsheet

The Import ASN workbook requires Microsoft Excel 97 or later.

1 Review the setting for CSV Delimiter specified on the Preferences subtab of the User tab in Admin » User Maintenance.

2 Review the file formats and validation criteria in the Importing ASN Files document:

- Flat file format
- Validation and conversion

The tilde-delimiter validations apply to the comma-delimited output from the Import ASN workbook.

3 Save the workbook to your system:

a Click this link to display the [Import ASN](#) workbook.

Note You must click the link from the online help system within the QAD Supplier Portal product to access the workbook file.

b Use File » Save As to save the workbook to your system.

4 Close the workbook in the browser.

5 Open and review the workbook on your system:

- The first worksheet has general information about the workbook and how to use it.
- The next worksheets are single- and multiple-ASN examples.
- The final worksheet is a blank form.

6 Copy the form to a new worksheet:

a Go to the Form worksheet.

b In the Edit menu, select Move or Copy Sheet... to open the Move or Copy dialog.

c In the Before sheet list box, select Form.

d Click in the Create a copy check box.

e Click OK.

7 Enter your ASN data in the new Form worksheet.

- 8 Save the ASN data as a comma-delimited flat file. With the completed form displayed:
 - a From the File menu, select Save As.
 - b From the Save as type drop-down box, select CSV (Comma delimited)(* .csv).
 - c Click Save.
 - d Excel displays a Caution window; click OK to save the current sheet.
- 9 Open the .csv file in a text editor and check for and remove blank rows or rows containing only commas.
- 10 Go to the [Importing ASNs](#) task.

Creating Flat Import Files with a Text Editor

Use any text editor to create the tilde-delimited flat file. As shown in the sample below, the file has four sections: ASN Header (Mandatory); ASN Line (Mandatory); ASN Detail (Mandatory); Packaging (Optional).

- 1 Review the file formats and validation criteria in the Importing ASN Files document:
 - Flat file format
 - Validation and conversion
- 2 Create the flat file using your ASN data and following the example.
- 3 Check the data against the format notes:
 - In Timestamp fields, the time component defaults to 00:00:00 if it is not specified.
 - Timestamp fields must be specified as:
YYYY-MM-DD hh:mm:ss or YYYY-MM-DD
where:
 - YYYY is the four-digit year
 - MM is the month number: 1-12
 - DD is the day of the month: 1-31
 - hh is the hour of the day: 0-24
 - mm is the minute of the hour: 0-59
 - ss is the second of the minute: 0-59
 - Decimal and integer numeric values must be represented without a thousands separator:
1000.00 and 1000.
 - Decimal values must use a period as the decimal separator.
 - Valid values for the header Status field are: incomplete, shipped, received.
 - Valid values for the detail Status field are: incomplete, pre-ship, open, closed. This field can also be left blank.
- 4 Save the file.
- 5 Go to the [Importing ASNs](#) task.

Sample Flat File

```

##ASNHeader
ASNNumber~ShipToID~Carrier~CarrierReference~TransportationMode~ShipDate~TargetDeliveryDate
~ActualDeliveryDate~Status
ASN-pack3-10000~carrier~car~4~2009-01-12~2009-01-13~2009-01-14~incomplete
##ASNLine
ASNNumber~ASNLine~OrderNumber~OrderLine~ItemID~PlaceID~ShipperID~ShipDate
ASN-pack3-1~tuziB101~1~tuzi~itm1~10000~ASN-pack3-1~2009-01-12
ASN-pack3-2~tuziB301~1~tuzi~kbitm1~10000~ASN-pack3-2~2009-01-12
ASN-pack3-3~tuziP06~1~tuzi~kbitm1~10000~ASN-pack3-3~2009-01-12
##ASNDetail
ASNNumber~ASNLine~ASNDetailNumber~LotSerialNumber~Quantity~CumShipQuantity~UM~UMConversion
~Reference~KanbanCardID~QtyPerPack~ContainerType~ContainerTare~Status
ASN-pack3-1~detail1~1~lot#1~1~50~0~EA~1.0~ref1~1~10~contype1~5~open
ASN-pack3-1~detail1~2~lot#1~2~50~0~EA~1.0~ref1~2~25~contype1~5~open
ASN-pack3-2~detail2~1~lot#2~1~20~0~EA~1.0~ref2~1~54124~10~nmpP1~1.5~open
ASN-pack3-2~detail2~2~lot#2~2~20~0~EA~1.0~ref2~2~54125~10~nmpP1~1.5~open
ASN-pack3-2~detail2~3~lot#2~3~20~0~EA~1.0~ref2~3~54126~10~nmpP1~1.5~open
ASN-pack3-3~detail3~1~lot#3~1~20~0~EA~1.0~ref3~1~54199~5~contype3~0.5~open
ASN-pack3-3~detail3~2~lot#3~2~20~0~EA~1.0~ref3~2~54201~5~contype3~0.5~open
##ASNPackingDetail
ASNNumber~ASNDetailNumber~ContainerID~ParentContainerID~ContainerCount~ContainerType~Conta
inerTare~ContainerCategory
ASN-pack3~~Plt1~~~Plt1~12~Pallet
ASN-pack3~detail1~1~Ctn1~1~Plt1~5~contype1~5~container
ASN-pack3~~Ctn2~Plt1~1~cont1~1.5~container
ASN-pack3~detail1~2~Item1~Ctn2~~~0~item
ASN-pack3~~Plt2~~~Plt2~13~Pallet
ASN-pack3~detail2~1~Ctn2~1~Plt2~2~nmpP1~1.5~container
ASN-pack3~detail2~2~Ctn2~2~Plt2~2~nmpP1~1.5~container
ASN-pack3~detail2~3~Ctn2~3~Plt2~2~nmpP1~1.5~container
ASN-pack3~detail3~2~item2~~~0~item
ASN-pack3~detail3~1~item3~Plt2~~~0~item

```

Creating XML Import Files

Use any text editor to create the XML file. The file has four sections: ASN Header (Mandatory); ASN Line (Mandatory); ASN Detail (Mandatory); Packaging (Optional).

- 1 Review the DTD and validation criteria in the Importing ASN Files document:
 - DTD
 - Validation criteria
- 2 Create the XML file using your ASN data and following the DTD.
- 3 Save the file.
- 4 Go to the [Importing ASNs](#) task.

Sample XML File

```
<?xml version="1.0" encoding="ISO-8859-1" ?>
<!DOCTYPE ASNLoad SYSTEM "ASN.dtd">
<ASNLoad>
  <ASNHeader
    Carrier=""
    ActualDeliveryDate=""
    ShipDate="2013-07-25"
    TransportationMode=""
    Status="Incomplete"
    TargetDeliveryDate=""
    CarrierReference=""
    ShipToID="10000"
    ASNNumber="AP110310A1" >
    <ASNLine
      OrderLine=""
      ASNLine="1"
      ItemID="brz01"
      ReleaseNumber=""
      ShipDate="2013-07-25"
      OrderNumber="P110310A"
      PlaceID="10000"
      ASNNumber="AP110310A1"
      ShipperID="AP110310A1" >
      <ASNDetail
        Quantity="10.0"
        UM="EA"
        ASNLine="1"
        UMConversion="1.0"
        Reference=""
        LotSerialNumber=""
        CumShipQuantity="0.0"
        Status="Incomplete"
        ASNNumber="AP110310A1" />
      <ASNDetail
        Quantity="20.0"
        UM="EA"
        ASNLine="1"
        UMConversion="1.0"
        Reference=""
        LotSerialNumber=""
        CumShipQuantity="0.0"
        Status="Incomplete"
        ASNNumber="AP110310A1" />
    </ASNLine>
  </ASNHeader>
</ASNLoad>
```

Changing Status: Canceled, Shipped, Received

Customers and consolidated customers can make several ASN status changes: Shipped to Received, Shipped to Canceled, and Canceled to Shipped or Received.

- 1 Go to ASNs View.
- 2 Follow the link on the ASN Number field that has status set to Shipped or Canceled.
- 3 Use the drop-down box to change the status to.
- 4 Choose the Save button to save your work to the server.

Note Changes to or from Canceled status apply to only the ASNs that suppliers create manually or import into QAD Supplier Portal.

Importing ASNs

There are three methods for creating ASN files to import: spreadsheet, flat text file, and XML. XML files always have .xml as their file extension; CSV files always have .csv as their file extension; all other file extensions are flat files.

QAD Supplier Portal generates messages when it encounters problems during import.

- 1 Go to the ASNs tab.
- 2 Click Import to display the Import ASN File dialog.
- 3 Select the ASN data file to import from the File box.
- 4 Click in the messages check boxes—Display Warnings, Display Information Messages—to specify which messages to display.
- 5 Click Load to load the ASNs in the selected file into QAD Supplier Portal and display the specified messages resulting from the load.

When QAD Supplier Portal receives a command to load a file, it follows this procedure:

- Transfers the specified file to the server.
- Determines the file format: XML, flat, or CSV.
- If the file is flat format, converts it to XML.
- Passes the imported or converted XML file to the XML parser.
- Validates the XML file against the appropriate DTD and any additional business rules.
- Loads the data from the XML file into the QAD Supplier Portal database to update existing records and create new records.
- Displays error, warning, and information messages as specified by the user.

Reviewing the ASN Import Log

Use the import log for import tracking and debugging.

- 1 Go to the ASNs tab.
- 2 Click Import to display the Import ASN File dialog.
- 3 Click in the messages check boxes—Display Warnings, Display Information Messages—to specify which messages to display.
- 4 Click View Log to display the specified messages from the last five file loads.

Exporting ASNs

Customers set up defaults for exporting ASNs. The ASNs are created or imported into QAD Supplier Portal by suppliers who want to load them into their ERP systems.

- 1 Go to Admin » Company » Company Maintenance.
- 2 For ASN Export Policy, set the default company policy.

- 3 For SNF, set the policy for SNF file output to either Standard SNF or SNF with Container Data.
- 4 For those suppliers to whom the default policy does not apply, set an alternate policy:
 - a Go to Admin » Supplier.
 - b Click the factory icon to display the suppliers.
 - c Select a supplier to whom the default export policy does not apply.
 - d In ASN Export Policy, set the policy for that supplier. The default (Default) uses the policy set in Company Maintenance.
- 5 Specify the target directory and default file name for the exported ASN file. For convenience, use the default inbound directory and file name expected by your EDI system. The directory must have write permissions.
 - a Using a text editor, open poller.properties in the poller directory.
 - b Add the following line to poller.properties:


```
EDI_ASN_FILE=targetDir/defaultFileName.snf
```

Note In the Cygwin UNIX environment, use the UNIX slash (/) rather than the DOS back slash (\).
- 6 Set up your EDI system to import the ASN file from the target directory.

Updating ASNs

When the status for ASNs for kanban items changes to Shipped, QAD Supplier Portal also changes the status of kanban cards to Shipped. Cards are chosen by status in this order: In Process, Acknowledged, Empty Authorized, Empty Accumulate, Full, Shipped unless specific Kanban IDs are entered in the Detail popup when entering the ASN. QAD Supplier Portal updates the status of a Ship Quantity of kanban cards.

Customer Updating

Customers are limited to updating the ASN status.

Interactively in QAD Supplier Portal. Customers can change the ASN status from Shipped to Received:

- 1 Go to ASNs » ASN Maintenance.
- 2 Select an ASN from the Search-Results pane.
- 3 In the Status field, select Received from the list box.
- 4 Click Save.

In the ERP System. Customers can update the ASN status to Received by matching receipts with ASNs. When the value in the QAD Supplier Portal Receipts view Shipper ID column is an ASN number, the status of that ASN changes to received. There are several ways to populate this Receipts view field:

- In MFG/PRO when using PO Shipper Receipt, enter the shipper ID from the ASN line in the Shipper ID field.
- In MFG/PRO when using Purchase Order Receipts, enter the shipper ID from the ASN line in the Packing Slip field.
- For other ERP systems, populate the receipt Shipper ID field with the shipper ID from the ASN line.

Supplier Updating

Suppliers can edit the ASNs that they create in QAD Supplier Portal or import into QAD Supplier Portal. To preserve synchronization with the customer's ERP system, only the status—not content—of these ASNs can be updated in QAD Supplier Portal.

Note Once status is changed to Shipped, no changes are allowed to the content of the ASN; only the status can be updated from Shipped to Received.

- 1 Display the ASN in ASN Maintenance.
 - In the ASN view, click the ASN number.
 - or
 - On the ASN tab menu, click ASN Maintenance and select the ASN number from the Search-Results frame.
- 2 Edit the ASN.
 - Click the Edit icon at the right side of a line or line detail to put the data into editable fields; then make the changes you want.
 - Click the Delete icon at the right side of a line or line detail to remove it from the ASN.
- 3 Click Save.
 - Until a shipment is in transit, save the ASN with status set to Incomplete.
 - Once the shipment is in transit, update the ASN status to Shipped.

Reviewing ASNs

Review ASNs that have both header and detail records in the QAD Supplier Portal database as well as ASNs that have only header records. ASNs with only header records—that is, no details—are visible only in this maintenance screen.

- 1 Go to ASNs » ASN Maintenance.
- 2 Select an ASN number from the Search-Results pane to display the existing data for that ASN.

Creating Containers for ASNs

You can optionally create containers for ASNs based on the Line Detail Maintenance data.

- 1 Go to ASNs » ASN Maintenance.
- 2 Select an ASN number from the Search-Results pane to display the existing data for that ASN.
- 3 On the ASN Header & Lines tab, for a given ASN line, click on the Detail button.

- 4 On the Line Detail Maintenance screen, review the data for the line. The number of containers will be derived from the CUM Qty divided by Qty/Pack.
- 5 Click on the Containers subtab.
- 6 Click Pack to have QAD Supplier Portal organize the ASN lines into containers based on the CUM Qty and Qty/Pack values. (Containers are created only if you click Pack.)
- 7 Review the containers data (see Containers).

If there are some items that are not packed into a container, you can track that by setting Container Category to Item. If Container Category is set to Item, you must blank out the Container Type, Number of Containers, and Container Tare fields.

You can unpack a line into two lines by selecting a line and clicking Unpack. You then must split the quantities across the two lines.

You can pack two or more lines into a pallet. Select the lines by clicking the checkbox for each line. To select all the lines, click Select All. To unselect all the lines, click Unselect All. Once you have selected the lines, click Pack. QAD Supplier Portal creates a new line for the pallet and organizes the packed containers in a level below the new line for the pallet. On the new line for the pallet, enter the appropriate Container Type and Container Tare data and click Save. QAD Supplier Portal automatically calculates the Gross Weight and Net Weight for the pallet.

You can unpack a line from a pallet by selecting it and clicking Unpack. The level will move up a level (for example, from 1 to 0) and the Gross Weight and Net Weight fields will be automatically updated for the unpacked line and the previously packed (pallet) line.

Creating Transport Labels

The Labels subtab is active only when ASN header, line, and detail information is available (see Labels). QAD Supplier Portal creates a line for each required label by figuring out what labels are needed based on the labels selected in Supplier Maintenance and the structure of the containers. You can then review the labels and change the label type selections to meet your requirements.

To print a label, click on the checkbox on the line for the label, specify the number of copies, and click the Print Selected button.

Deleting ASNs

Delete ASNs when the demand is canceled before the shipment is in transit.

Columns and Fields

ASN Header & Lines

ASN Number. A unique identifier for the Advanced Shipment Notices.

Ship To. The address to which you are shipping.

Dock/Gate. The dock or gate to which you are shipping.

Status. The status of the ASN; for example, Incomplete, Shipped, or Received. Once Status is changed to Shipped, you cannot make any other changes to the ASN. (If you want to make changes later, leave the status as Incomplete.) Only the customer can change the status of an ASN to Received.

Ship Date. The actual date of the shipment.

Target Delivery Date. The date when you expect the shipment to arrive at your customer's site. QAD Supplier Portal provides a default date calculated as Target Delivery Date = Ship Date + Replenishment Time.

Replenishment Time is calculated depending on where the ASN Line associated with the Target Delivery Date was created, using one of the following methods:

- If created from a Schedule, it is the Transportation Lead Time in the Schedule Line.
- If created from a Kanban Board, it is the Replenishment Time in the Kanban Board.
- If created from a discrete Purchase Order, it is the Replenishment Time defined in Admin » Company » Item » Item Maintenance.
- If any of the above values are blank, Replenishment Time defaults to 1.

Reference Links. Click the View/New/Edit button to display the Reference Link Maintenance screen. The Reference Link Maintenance screen lets you associate Uniform Resource Locators (URLs) with ASN Lines.

Line. ASN line number.

Item ID. Code to identify the item.

Quantity. The quantity you are shipping.

UM. The unit of measure in which your quantity is expressed; for example, lbs, gallons, ea, and so forth.

Shipper ID. The document number for the shipper document with which you are shipping the material.

Detail. Click the Detail button to access the Line Detail Maintenance screen.

Replenish. Replenishment quantity from Min/Max view.

Site. The site ID from the ERP database, shown in the customer purchase order.

Order Number. Customer's order number.

Line. Order line number.

Release. Schedule release number.

Delivery Date. The actual date of the delivery. Only the ASN import functionality can update this field. This field can not be updated directly from the ASN Maintenance screen.

Description. A description of the item.

Reference Links. Click the View/New/Edit button to display the Reference Link Maintenance screen. The Reference Link Maintenance screen lets you associate Uniform Resource Locators (URLs) with ASN Headers.

In addition to the above fields, ASN Lines provides links to activate a dialog for discrete orders and scheduled orders in Add Lines from Discrete Orders, Add Lines from Scheduled Orders, and Add Lines From Kanban Cards.

Containers

ASN Number. A unique identifier for the Advanced Shipment Notices.

Ship To. The address to which you are shipping.

Dock/Gate. The dock or gate to which you are shipping.

Status. The status of the ASN; for example, Incomplete, Shipped, or Received. Once Status is changed to Shipped, you cannot make any other changes to the ASN. (If you want to make changes later, leave the status as Incomplete.) Only the customer can change the status of an ASN to Received.

Ship Date. The actual date of the shipment.

Target Delivery Date. The date when you expect the shipment to arrive at your customer's site. QAD Supplier Portal provides a default date, equal to the ship date plus one day.

Reference Links. Click the View/New/Edit button to display the Reference Link Maintenance screen. The Reference Link Maintenance screen lets you associate Uniform Resource Locators (URLs) with ASN Lines.

Lvl. The level in the container structure, where 0 is the top level, 1 is the next level, and so on.

Container Category. Select either Container or Item, where Container indicates the item is in a container and Item indicates the item is included individually rather than in a container. If Item is selected, the Container Type, Number of Containers, and Container Tare fields should be blank because no containers are being used for the particular item. When you pack two or more container lines together, QAD Supplier Portal creates an additional container type, Pallet, to organize the containers at a level above the packed containers.

Container Type. Specifies the type of the container.

Number of Containers. Specifies the number of containers based on the Line Detail Maintenance screen's CUM Qty divided by Qty/Pack.

Qty/Pack. The quantity of items or containers in this pack. This cannot be 0 or a negative value.

Cum. The cumulative quantity for a particular item totaled over separate lines.

Container Tare. The weight of the empty container.

Net Weight. The sum of the item's net weight multiplied by the quantity.

Gross Weight. The weight of the items on this line plus their container weight. The gross weight equals (Qty/Pack * Number of Containers * Net Weight) + (Container Tare * Number of Containers).

UOM. The unit of measure for the items.

Item ID. The customer's item number.

Lot Serial. Lot or serial number information attached to the items on a line.

Kanban ID. The kanban ID attached to the items on a line.

Reference. The reference for the lot or serial number.

Container ID. The ID for the container.

Note You can only modify the container information for ASNs whose status is Incomplete. Once the ASN status changes to Shipped, you can not modify the container information.

Labels

ASN Number. A unique identifier for the Advanced Shipment Notices.

Ship To. The address to which you are shipping.

Dock/Gate. The dock or gate to which you are shipping.

Status. The status of the ASN; for example, Incomplete, Shipped, or Received. Once Status is changed to Shipped, you cannot make any other changes to the ASN. (If you want to make changes later, leave the status as Incomplete.) Only the customer can change the status of an ASN to Received.

Ship Date. The actual date of the shipment.

Target Delivery Date. The date when you expect the shipment to arrive at your customer's site. QAD Supplier Portal provides a default date, equal to the ship date plus one day.

Reference Links. Click the View/New/Edit button to display the Reference Link Maintenance screen. The Reference Link Maintenance screen lets you associate Uniform Resource Locators (URLs) with ASN Lines.

Checkbox. Click the checkbox for a line to select the labels you want to print. To print the selected labels, click Print Selected.

Copies. Select the number of copies for each label (default is 1). This is useful if you want print multiple copies of the same label.

Serial Number. The label serial number, which must be a unique, numeric value. This field must not be left blank. You can either enter the values or have QAD Supplier Portal generate them for you by clicking the Generate Serial Numbers button. By clicking on Generate Serial Numbers, you have QAD Supplier Portal generate unique serial numbers starting from the most recent serial number used for the supplier, where the very first serial number is specified in the Company's Starting Label Serial field. For example, if Starting Label Serial is set to 00000123, the first five serial numbers for the supplier will be 00000123, 00000124, 00000125, 00000126, and 00000127. Then, when you next click Generate Serial Numbers for another five, the numbers will be 00000128, 00000129, and so on. The system requires that serial numbers be unique for 366 days. For example, if you use 00000123 as a serial number, you will not be able to use that number as a serial number again until after 366 days.

SI. The serial indicator that indicates the type of serial number. The serial indicator can be Single (S), Multiple Common (M), Mixed (G), or Master (4S), depending on the label type.

Label Type. The label type for this container. QAD Supplier Portal figures out the label type you will most likely want to use, depending on whether as a supplier you are using ODETTE labels or AIAG labels. You then can change the selection as needed.

Item ID. Code to identify the item.

Eng Change. The engineering change ID for the items in each container.

Quantity. The quantity in each container.

DI. The date indicator (DI), which indicates whether the date on the label is the delivery date (D) or the production date (P).

Date. Either the delivery date or the production date, depending on the DI value. You can use the date wizard to select the date, which by default is the current date.

Kanban ID. The kanban ID for this line.

Batch. The Lot/Serial or batch for this line.

Reference. The reference ID for this line.

Seq. The printing sequence of the item. This field specifies the order in which labels are printed when you click the Print Selected button.

Net Weight. The sum of the item's net weight multiplied by the quantity.

Container Tare. The weight of the empty container.

Note You can only modify the label information for ASNs whose status is Incomplete. Once the ASN status changes to Shipped, you can not modify the label information.

Tracking

ASN Number. A unique identifier for the Advanced Shipment Notices.

Ship To. The address to which you are shipping.

Dock/Gate. The dock or gate to which you are shipping.

Status. The status of the ASN; for example, Incomplete, Pre-Ship, Shipped, or Received. Once Status is changed to Shipped, you cannot make any other changes to the ASN. (If you want to make changes later, leave the status as Incomplete.) Only the customer can change the status of an ASN to Received.

Ship Date. The actual date of the shipment.

Target Delivery Date. The date when you expect the shipment to arrive at your customer's site. QAD Supplier Portal provides a default date, equal to the ship date plus one day.

Reference Links. Click the View/New/Edit button to display the Reference Link Maintenance screen. The Reference Link Maintenance screen lets you associate Uniform Resource Locators (URLs) with ASN Lines.

Track With TMS. Specifies whether this shipment will be tracked using QAD Transportation Management System (TMS).

Carrier. The name of the carrier transporting the material. If Track With TMS is enabled, a drop-down list lists the available carriers.

Carrier Reference. The carrier's unique number to identify the shipment.

Additional References. Click to access page for entering additional track and trace reference information.

Transportation Mode. The particular form of transportation being used. If Track with TMS is enabled, a drop-down list offers the following options: Transport By Sea, Transport By Rail, Transport By Road, Transport By Air, Consignments By Post, Fixed Transport Installations, Transport By Inland Waterway, or Own Propulsion.

QAD TMS. Click to access QAD Transportation Management System (TMS).

Line Detail

Lot/Serial. Lot or serial number information for the line.

Kanban. The kanban ID for this line.

Qty. Quantity in the lot or serial number.

CUM Qty. Cumulative quantity. (In the Containers subtab, the Number of Containers is derived from the CUM Qty divided by Qty/Pack.)

Qty/Pack. The quantity of items or containers in this pack.

Cont Type. The container type, which is the identifier given to the type of container usually used to ship the item.

Cont Tare. The container tare, which specifies the weight of the container without the item in it.

Reference. Lot reference. Additional information about lot.

Schedule Date/Time. The date and time of the schedule associated with this line item.

ASN Mass Cancellation

You can cancel a group of ASNs using the Cancel ASN screen. To access the screen, choose ASN » Cancel ASNs.

ASNs can be canceled so long as they are:

- Maintained by supplier manually in QAD Supplier Portal
- Imported by supplier in QAD Supplier Portal
- Are no longer matched with receipts.

To cancel ASNs:

- 1 In the Cancel ASNs screen, you can specify a set of ASNs within a range by setting the From-To Supplier, From-To ASN, From-To Ship To and From-To Ship Date fields.
- 2 Set Cancel to Yes if you want to Cancel the ASNs at this time.

- 3 Set Print to Yes if you want to print a report of the selected ASNs at this time. You can print a report before, during, or after a cancellation.
- 4 If you set Print to yes, select the format and orientation of the report by setting the Format and Orientation fields. For example, you can generate a PDF with landscape orientation.
Note If you select PDF format and the report is longer than 1500 lines, a message will display indicating the PDF report will be truncated at 1500 lines and giving you the option to create a CSV format report instead.
- 5 Click Run.
- 6 If printing, click OK in the Processing. Please Wait... pop-up window that appears.

Column/Field Descriptions

The Mass Cancellation screen contains these columns and fields:

From-To Supplier. These are the first and last suppliers in a range of suppliers.

From-To ASN. These are the first and last ASN Numbers in a range of ASNs.

From-To Ship To. These are the first and last ship-to values in a range.

From-To Ship Date. These are the first and last dates in the range of ship dates to be processed.

Cancel. Select Yes to cancel all the ASNs within the specified ranges and parameters.

Print. Select Yes to print all the ASNs within the specified ranges and parameters.

Format. Select Acrobat PDF, comma-separated values (CSV), or symbolic link (SLK) format.

Orientation. Orientation applies only to PDF-format. QAD Supplier Portal can generate PDF files in portrait or landscape orientation.

File Name. Specify the file name.

Exported ASN File Format

The following tables describe the mapping from ASNs in QAD Supplier Portal to the records in the exported ASNs Supply Visualization Format (SVF) file.

Sample File. The sample file has one header record with two item records and their lot records. Since the records are not wrapped, use the browser window sliders to view their full length.

Record Data Types.

- I: Integer
- AN: Alpha Numeric; Time HHMMSS
- R: Rational (13,5)
- D: Date YYYYMMDD
- * = Hard coded values.

1. Control Record

	Record Field Name	QAD Supplier Portal Field	Type	Position	Length
1	Record Type Indicator	**	AN	1	2
2	Filler		AN	3	3
3	Trading Partner ID	Supplier ID	AN	6	50
4	Trading Partner Document ID	SVASN	AN	56	6
				62	

2. Header Record–10 ASN Header

	Record Field Name	QAD Supplier Portal Field	Type	Position	Length
1	Record Type Indicator	10*	AN	1	2
2	Purpose Code	00* (Create ASN) or 01* (Cancel ASN)	AN	3	2
3	ASN Number	ASN Number	AN	5	30
4	ASN Date	CreateDate		35	8
5	ASN Time	CreateTime		43	6
6	Ship From ID	supplier ID	AN	49	50
7	Ship To ID	Ship-to Address	AN	99	50
8	Shipment Date	Ship Date	D	149	8
9	Shipment Time	Ship Time	AN	157	6
10	Shipment Time Zone	Ship Time Zone	AN	163	20
11	Target Delivery Date	Target Delivery Date	D	183	8
12	Target Delivery Time	Target Delivery Time	AN	191	6
13	Target Delivery Date Time Zone	Target Delivery Date Time Zone	AN	197	20
14	Actual Delivery Date	Actual Delivery Date	D	217	8
15	Actual Delivery Time	Actual Delivery Time	AN	225	6
16	Actual Delivery Date Time Zone	Actual Delivery Date Time Zone	AN	231	20
17	Carrier	Carrier	AN	251	50
18	Carrier Reference	Carrier Reference	AN	301	30
19	Transportation Mode	Transportation Mode	AN	331	30
				361	

3. Item Record–40 ASN Line

	Record Field Name	QAD Supplier Portal Field	Type	Position	Length
1	Record Type Indicator	40*	AN	1	2

2	Line No	ASN Line	1	3	11
3	PO No	Order Number	AN	14	30
4	PO Line No	Order Line	I	44	11
5	Part Number	Item	AN	55	50
6	Ship-to Site	Site	AN	105	30
7	Shipper ID	Shipper ID	AN	135	30
8	Release Number	Release	AN	165	30
				195	

4. Lot Record–50 ASN Detail

	Record Field Name	QAD Supplier Portal Field	Type	Position	Length
1	Record Type Indicator	50*	AN	1	2
2	Lot/Serial Number	Lot/Serial Number	AN	3	30
3	Ship Quantity	Quantity	R	33	13
4	Cumulative Ship Quantity	CUM Ship Quantity	R	46	13
5	UM	UM	AN	59	8
6	UM Conversion	UM Conversion	R	67	13
7	Reference	Reference	AN	80	30
				110	

Exported ASN File Sample

```

**  Suplier1                      SVASN

1000myaponew03                    Suplier1                    10000
20020909210038M0800_03_01_1_0200 20020910210038M0800_03_01_1_0200
Carrier1                          Carrier Reference 1        Trans Model1

401    myapo01                    1      Item1A                      10000
myapoasn02

50lot-123                        10.00000  0.00000  EA   1.00000  ref123
50lot-123                        15.00000  0.00000  EA   1.00000  ref124

402    myapo01                    2      Item1B                      10000
myapoasn02

50lot-124                        20.00000  0.00000  EA   1.00000  ref1245
50lot-125                        25.00000  0.00000  EA   1.00000
50                                30.00000  0.00000  EA   1.00000  ref12456

```

Exported ASN SVN (With Containers) Sample

**

```
##SVSupplier          SVASN tuzi-sup
0500L15-01           200904120000  200904170000
10   tuzi-sup 10000
11DC
12
14
20P
35   C container      3  2   container      10   EA
10   36   66
36111
AIAG-005                2   D           20090223
36112
AIAG-005                2   D           20090223
36113
AIAG-005                2   D           20090223
40   1  tuzi-kbitm1    10000      SNF-Level1-01-1b
10  tuziB3           1
491-2                200.0    0.0    EA  5
```

Reset Exported ASN Status

Some customers require the ability to re-export shipped and exported ASNs into the SNF file.

Admin » Data Management » Export » Reset ASN Export Status as Non-Exported allows customer administrator users to select ASNs with a status of Shipped and an export status of Exported and to reset the export status to Not-Exported. The next time the Gen load process runs, it re-exports the reset ASNs.

Export CIM Supplier Performance

The following prerequisites must be completed before using supplier performance.

For supplier performance CIM export, you must do the following to set up PRO/PLUS:

- Create a category named SV_VMI in Performance Category Maintenance (5.15.1) with a computation method of Discrete.

- Create event types in Performance Event Maintenance (5.15.5) for each of these supplier performance events: aboveMAX, belowMIN, and belowOP.
- Use Registration Maintenance (5.15.10) to register any item-site-suppliers that are to be exported to PRO/PLUS. Specify a supplier source of PO and the ID of the supplier you want to track. You can optionally include the recurring site and item number in the registration.
- Set an export policy for a supplier to allow exporting. See the Supplier Performance Export Policy field in Supplier Maintenance.
- Using a text editor, open the poller.properties file in the poller directory and add the following line:

```
CIM_SUPPLIER_PERFORMANCE_FILE=file
```

Where file is a user-defined fully qualified path, such as /tmp/sp.cim to the location where the poller will place the resulting CIM file. This location must be writable by the user under which the poller is run.

Note Supplier Performance CIM occurs during the hourly data load. The timing of events, the degree of accuracy, is a day for an item-site-supplier; that is, at most one event of a given type per day.

Export User-Defined Fields and PO Acknowledgments

An export feature provides users with the ability to export UDF and PO acknowledgment data from QAD Supplier Portal to the poller client.

Set Up the Policy

To enable the export of user-defined fields (UDFs) and PO acknowledgment data from QAD Supplier Portal to the poller client, you must first set up the relevant policy. The Policies tab in Company Maintenance contains a policy that controls the export feature for UDF and PO acknowledgment data.

- 1 Go to Admin » Company » Company Maintenance.
- 2 Go to the Policies subtab.
- 3 Set the Extract UDF and PO Ack Policy field to Extract UDF and PO Ack data.
- 4 Click Save.

Configuring the Poller

- 1 Stop the poller.
`./svpoller stop`
- 2 Download svpoller.tar using a customer administrator account. You can download the file from the Help » Poller Installation menu at <http://www.mfgx.net/sv>.
- 3 Untar the svpoller.tar file in a temp directory.
- 4 Copy the eqsv.jar file from temp/svpollер to the actual poller directory.

- 5 Set up the EXPORT directory in the `poller.properties` file. See “Update the Configuration File”.

- 6 Start the poller.
`./svpoller start`

Note See the Help » Poller Installation menu in QAD Supplier Portal for detailed information on poller operations such as starting the poller, stopping the poller, and re-starting the poller.

Update the Configuration File

The `poller.properties` configuration file contains an optional section that lets you specify the folder in which to store extracted UDF and PO acknowledgment data. Use the following parameter to define the folder where you want to save the exported CSV file:

`UDF_POACK_EXTRACTION_DIR=[CSVFILESFOLDER]`

Note You do not need to add “\” for the path. QAD Supplier Portal creates the directory automatically.

Set Up the Export Parameter

In Admin » Data Management » Export » Export UDF & PO Ack - Parameter, you can set up delimiters for the exported CSV file. You must log in as a customer admin user to configure this parameter.

CSV Delimiter. Specify a value for QAD Supplier Portal to use as a delimiter for the extracted CSV UDF and PO acknowledgment data file.

The default value is blank, which means that QAD Supplier Portal uses a comma as a delimiter.

Export Process

When a customer administrator has set up the policy, the poller, and the parameters described in the previous sections, the UDF and PO acknowledgment data is exported to the folder defined in the `poller.properties` file every time the Gen load or GIP load runs.

- The file name for exported UDF data is `UDFYYYMMDDHHMMSS.csv`
- The file name for exported PO acknowledgment data is `POYYYYMMDDHHMMSS.csv`

The files include all UDF or PO acknowledgment records that were updated in the period from the last successful export to the current loading.

View the Export History

You can view the history of UDF and PO acknowledgment data file exports in Admin » Data Management » Export » Export UDF & PO Ack - Monitoring. The monitoring history shows the recent exports up to a maximum of the 20 most recent exports.

QAD Supplier Portal VMI and Kanban Integration Kits

The Integration Kits have tools for accessing and displaying data from non-MFG/PRO ERP systems and devices such as bar code scanners.

Using XML files and the QAD Supplier Portal pollers, customers can integrate their ERP systems with QAD Supplier Portal for uploading setup and transaction data. Using QAD Supplier Portal Web services, customers and suppliers can integrate devices with QAD Supplier Portal for uploading kanban transaction data:

- For VMI or kanban setup and transaction data, a customer-defined process extracts the data from the customer's ERP database and writes the data to XML documents in the poller directory. The appropriate QAD Supplier Portal poller—VMI, kanban—then uploads the files from the poller directory to the QAD Supplier Portal database.
- For kanban transaction data from a device, a user-defined process drives the user-generated Web services client to upload the transaction data.

The kits include online guides, sample files, and support documents such as the XML DTDs. View the kits online or download them for printing or saving to a file.

Loading VMI Data

Use Admin » Data Management » Data Setup » Manual Data Load to interactively load data into the QAD Supplier Portal database.

Use Admin » Data Management » Data Setup » Auto Data Load to set up a schedule for automatic data loading into the QAD Supplier Portal database.

The data load functions apply to only VMI data.

Both data load functions load data from the ERP database or from a working data set file. Use them to populate the original base data set from the ERP database or from a working data set file. You can also use the functions to periodically synchronize the item-site-suppliers in the QAD Supplier Portal and ERP databases. See VMI Base Data Set and Data Sources in the Reference section.

Tabs, Subtabs, and Fields

Both functions have a Search tab; only Auto Data Load has an Auto Data Load tab.

Auto Data Load Tab

Click the VMI poller user ID on the Search tab to access the Auto Data Load tab.

Poller User Name. This read-only field shows the name of the selected poller.

Enable. Indicate whether the auto data load schedule should be enabled.

Frequency. Specify whether to schedule the event daily or weekly.

Day. Specify the day of the week for a weekly scheduled event.

Time. Specify the time of day for the scheduled event.

Time Zone. Specify the time zone for the scheduled event. This is required for daily auto load.

Net Weight. Specifies the weight of the item with no shipping materials.

Net Weight UM. Specifies the net weight unit of measure: the unit of measure (for example, pounds or kilos) for the item weight.

Ship Weight. Specifies the weight of the item plus its shipping materials.

Ship Weight UM. Specifies the ship weight unit of measure: the unit of measure (for example, pounds or kilos) for the item in its shipping container.

Ship Volume. Specifies the ship volume: the volume of the item plus its shipping materials.

Ship Volume UM. Specifies the ship volume unit of measure: the unit of measure (for example, cubic feet or cubic meters) for the item in its shipping container.

Item Draw. Specifies the item drawing number: the latest revision of drawing for this item.

Container Type. The type of container used for items in this loop, such as tray or tub.

Container Tare. Specifies the weight of the container without the item in it.

Standard Pack. Specifies the number of units of the item usually shipped in one container.

Replenishment Calculation Policy. Specifies how replenishment calculations are performed: 0 for Min/Max controlled; 1 for Schedule controlled.

Schedule Replenishment Horizon. This field is enabled when Replenishment Calculation Policy is set to Schedule-controlled replenishment. It is the number of work days on the schedule to use when calculating the replenishment quantity.

Replenishment Calculation Policy. Specifies how min/max calculations are performed: 0 - Disable, use manual entries; 1 - Enable min/max calculations; 2 - Default to policy defined on Admin » Company » Policies » Min/Max Calculation Policy.

Order Point Calculation Policy. Specifies how order point calculations are performed: 0 - Disable, use manual entries; 1 - Enable order point calculations; 2 - Default to policy defined on Admin » Company » Policies » Order Point Calculation Policy.

Demand Template. The template specifies the number of actual history days and the number of forecast days to use in calculating the average demand. A template can be attached to any number of item-sites. Define templates in Admin » Company » Demand Calculation Template.

Replenishment Quantity Rounding. Specifies the rounding policy for replenishment quantities: 1 - round up; 2 - round down; 3 - percentage-based.

Rounding Percentage. This is the percentage of the order multiple that is used in percentage-based rounding of replenishment quantities for min/max-controlled items. This field is displayed only when Replenishment Quantity Rounding is set to percentage-based rounding. Valid values are 1 to 100.

Order Multiple Quantity. Suppliers use this multiplier to determine quantities needed to replenish inventory.

When suggested replenishment quantity is not specified, Supplier Portal uses this value, if it is non-zero, to generate a calculated replenishment quantity. This cannot be a negative number.

Fixed Ordering Interval. The equivalent of accumulated lead time, this is the number of days between orders sent to a supplier. Valid values are 0 to 999.

Ordering Interval. Specifies lead time for orders. Valid values are from 0 to 999.

Replenishment Time. This is the number of days required to ship the product, transport it, and receive it at the customer site. Valid values are 0 to 999.

Order Quantity Days. The equivalent of buffer stock days, this is the number of days worth of inventory required to protect against fluctuations in the production process and demand. Valid values are 0 to 999.

Search Tab

Data. Records displayed as specified on the Filter and Display subtabs. Click the column labels to sort the data rows.

Filter. Use the Filter subtab to specify the search criteria for selecting which records to include in the Data subtab display.

Display. Use the Display subtab to specify which columns to include in the Data subtab display.

Data Loading Tasks

Manually Load VMI Data

Use this function to manually load data from the ERP database or from a working data set file.

- 1 Go to Admin » Data Management » Data Setup » Manual Data Load.
- 2 Select the VMI poller to receive the Initiate Loading instruction.
- 3 Click Initiate Loading.

Define an Auto Data Load Schedule

Use this function to schedule data loading from the ERP database or from a working data set file.

- 1 Go to Admin » Data Management » Data Setup » Auto Data Load.
- 2 Click the poller User ID to open the Auto Data Load tab for the VMI poller to be scheduled.
- 3 For each poller:
 - a Select the frequency—weekly, daily—for the data load.
 - b For weekly schedules, select the day of the week.
 - c For daily schedules, select the hour and time zone. The default is the user's time zone.
 - d Click Save.

Reference

VMI Base Data Set

The VMI base data set in the QAD Supplier Portal database holds the items, sites, suppliers, and associated data such as purchase orders and supplier schedules. QAD Supplier Portal displays the data and business information only after item-site-supplier associations are defined in the working data set.

Data Sources

Both manual and auto data loads can load data from the ERP database or from the working data set file.

- **ERP Database.** If the working data set file is not present in the poller directory, QAD Supplier Portal loads the items—with existing purchase orders regardless of status—and the associated sites and suppliers from the ERP database into only the base data set in the QAD Supplier Portal database.
- **Working Data Set File.** If the appropriate file is present in the poller directory, QAD Supplier Portal loads those item-site-suppliers into the base data set. It also creates a working data set if one does not exist or completely replaces the existing working data set.

Loading VMI Inventory Item Policies

This document contains the information required to create VMI inventory item policy files for QAD Supplier Portal:

Load Process

For the automatic, general working data set update, QAD Supplier Portal does the following:

- 1 As frequently as once per hour, the server sends the poller the instruction to do the general working data set update.
- 2 The poller checks the poller directory for the inventory item policy file, `gen.itempolicy.input`.
- 3 If the file is present, the poller loads those inventory item policies into the QAD Supplier Portal database.

File Format

Create the `gen.itempolicy.input` file in the poller directory to load the data through the poller. On running the `genload`, QAD Supplier Portal reads the data from the input file and updates the data in Item Policies. The syntax of the input file is as follows:

Column	Type	Element
1	Char	Item ID
2	Char	Place ID
3	Double	Minimum Qty
4	Double	Maximum Qty

Column	Type	Element
5	Double	Order Multiple Qty
6	Double	Replenish Qty
7	Char	ManagedBy (Both or TimePhased or Min/Max)
8	Double	Order Point
9	Char	ReplCalc Policy (MIN_MAX or SCHEDULE)
10	Double	Schd Repl Horizon
11	Char	MinMax Calc Policy (DISABLE or ENABLE or DEFAULT)
12	Char	OP Calc Policy (DISABLE or ENABLE or DEFAULT)
13	Char	Demand Template ID
14	Char	Repl Qty Rounding (ROUND_UP or ROUND_DOWN or PERCENTAGE_BASED)
15	Double	RoundingPct
16	Double	Fixed Ord Interval
17	Double	Ord Interval
18	Double	Repl Time
19	Double	Ord Qty Days

Set any field value as a question mark (“?”) to keep the default value.

File Example

The following is an example of the input file in the correct format:

```
"mrh0210" "20000" 100 200 ? ? "Both" 150 "MIN_MAX" ? ? ? ? ? ? ? ? ?
"mrh0210" "2000" 200 300 350 400 "Both" 250 "SCHEDULE" 3 "DISABLE" "DISABLE" ? "ROUND_UP"
? 6 7 8 9
```

File Validation

To be successfully processed, the inventory item policy file must pass these validations during the load process. Any error messages are written to genload.log in the poller directory:

- The minimum quantity must be greater than or equal to zero.
- The maximum quantity must be greater than or equal to zero.
- The maximum quantity must be greater than the minimum quantity.
- If minimum quantity is defined, maximum quantity must be defined.
- If maximum quantity is defined, minimum quantity must be defined.
- The item-site pairs must be members of the current working data set.
- The order point must be greater than or equal to zero.
- The order point must be greater than the minimum quantity.
- The order point must be less than the maximum quantity.

Training Accounts

Use Admin » Request Training Account to request an account to use for QAD Supplier Portal training. With a training account, customers can keep their training data and production data separate.

- 1 Go to Admin » Request Training Account.
- 2 Enter the appropriate information in the From and Comment fields.
- 3 Click Submit.

Update History

Use Update History - VMI and Update History - Kanban on the Admin » Data Management » Data Setup menu to monitor poller data loading and updating activity.

For VMI data, track manual and auto data loading from the ERP database or from a working data set file as well as the automatic updates—general and receipts/ASNs—to the working data set.

For kanban data, track the automatic working data set and transactions updates. You can also adjust the last transaction loading date.

Security Group Availability. These menu items are available to only customer admin users.

Update History Fields

The first table shows the fields common to the two screens. The second table shows the kanban-specific fields.

Common Fields

Poller. The account name and an information icon for the poller. Pass the mouse over the icon to view detailed information about the poller.

Start, End. The server starting and ending date and time for the most recent update.

Duration. The amount of time—in minutes—required for the most recent update.

Last Successful Update. The date and time of the most recent update that completed without errors.

Kanban-Specific Fields

Last Kanban Transaction Date. The date and time of the most recent transactions update.

Set Last Kanban Transaction Date back by. Use this field to set back the date for the most recent transactions update.

Task: Setting back the Kanban transaction date

- 1** Assess the transactions in the ERP system and note the date and time for the earliest transaction that is not in QAD Supplier Portal.
- 2** Go to Admin » Data Management » Data Setup » Update History.
- 3** Note the Last Kanban Transaction Date.
- 4** Calculate how much to set the date back in order to capture the earliest missed transaction.
- 5** In the field, Set Last Kanban Transaction Date back by, enter the appropriate days, hours, and minutes to set the transaction date back.
- 6** Click Submit.

The next time that the poller loads transactions, it will compare the transaction time stamps to the revised last transaction date and load the previously missed transactions.

Reference

Kanban Transaction Date

Each time that QAD Supplier Portal loads transactions, the poller evaluates the time stamp on each transaction relative to the value in the Last Kanban Transaction Date field. The poller loads only those transactions whose time stamps are later than the value in this field.

Transactions can miss their window of opportunity for loading into QAD Supplier Portal, for example, if they are not recorded immediately in the ERP system. Customer admin users can set the last transaction date back so that the poller will capture any missed transactions the next time it uploads to QAD Supplier Portal.

VMI Working Data Set Updates

The two automatic updates to the VMI working data set differ in schedule and content.

During the updates, QAD Supplier Portal retrieves supplier item data only when the supplier-item relationship is established on a purchase order or defined in the ERP database. If neither of these is true, supplier-item ID and item ID are the same.

VMI Receipts and ASNs Update

This update runs as frequently as every five minutes.

This update runs multiple times an hour, as often as, but no more frequently than, every five minutes. Depending on the content of the working data set, the poller running the inventory update returns the following:

- Items
- Sites
- Item sites
- Suppliers

- Supplier items
- PO receipts, without details, for today and yesterday as well as related PO headers and lines
- Ship-to company names for new receipts
- ASNs and related PO headers and lines

VMI General Update

This update runs as often as, but no more frequently than, once an hour. Depending on the content of the working data set, the poller running the working data set update returns the following data:

- Items
- Sites
- Item sites
- Suppliers
- Supplier items
- Open POs including headers, lines, and supplier schedules; closed POs if there has been receipt activity in the past 15 days
- ASNs for open POs or closed POs if there has been receipt activity in the past 15 days
- Receipts for the past 30 days including details such as lot/serial number for open POs or closed POs if there has been receipt activity in the past 15 days; a summary with no details for all receipts prior to 30 days from today

Transaction Loading Retry Queue and Log

Use Inventory » Kanban » Retry Queue to view kanban transactions that the poller will try again to load into the database after previous unsuccessful attempts.

Use Inventory » Kanban » Retry Log to view transactions that the poller could not successfully load despite multiple attempts.

Note The retry queue is available only when transactions are loaded through the poller.

The system rejects card transactions during loading because of system problems or because there is no setup data for the loop the card belongs to. A transaction is not placed in the retry queue as a result of other errors such as bad data, malformed data, or poor business logic.

Refining the display. All users can refine the view displays. Go to the Filter tab to specify the search criteria for selecting which records to include in the current Data tab display. Go to the Display tab to specify which columns to include in the Data tab display. Click the column labels to sort the data rows.

Retry Queue and Log Fields

This table includes all columns/fields that are available for display in the Retry Queue and Retry Log views.

Effective Date. Effective date is a user-specified date and time when the transaction is assumed to have occurred in the ERP system. The is not necessarily the same as timestamp which is system generated.

Kanban ID. The kanban ID is the unique identifier for each kanban card.

Retry Result. Possible retry results are:

- Out of Sequence: The transaction is invalid based on the current state of the kanban card, for example, a consume transaction cannot be applied to a card in the empty state.
- Invalid Date: The Time Stamp for this transaction is later than the current GMT time. Transactions with date-time in the future are not allowed.
- Invalid Origin: Not currently used.
- Authentication Failed: The entered password is not valid for the log-in ID.
- Authorization Failed: The log-in ID is not authorized to send transactions. The log-in ID must be for an account that belongs to the poller or Web services user security groups. See Security Groups Reference in User Maintenance.
- Empty bundle: The transaction message contained no transactions.
- Invalid Transaction Name: Valid transaction names:
 - acknowledge
 - consumewithoutaccumulator
 - consumewithaccumulator
 - authorize
 - fill
 - hold
 - release
 - ship
- Invalid Data: The transaction has an invalid Time Stamp or the transaction message contains incorrectly formatted data such as an incorrectly encoded organization ID. The organization ID identifying a customer organization is an integer formatted as a base-36 string. The code is available in Help » Integration Kit or from the bar code printed on the kanban card.
- Invalid Organization: The organization ID on this transaction does not correspond to a defined organization in the database.
- Duplicate Transaction: There are two cases when a transaction is considered a duplicate:
 - The client is a poller and the external transaction ID—from the ERP system—already exists for the target customer.
 - The client is a Web service and another transaction of the same type has been recorded during the minimum cycle time.

External Transaction ID. The transaction number in the ERP system.

Poller ID. This is the ID for the poller that loaded the kanban transaction data.

Transaction Name. Possible transactions are:

- Authorize
- Consumewithoutaccumulator
- Consumewithaccumulator
- Acknowledge

- Fill
- Hold
- Release
- Ship

Transaction User ID. This is the name of the user who performed this transaction for this kanban ID.

Latitude. Latitude is the geophysical position—in degrees from the equator—of the card when the transaction was recorded.

Longitude. Longitude is the geophysical position—in degrees from Greenwich—of the card when the transaction was recorded.

Retry Count. Count is the number of times that the poller has tried to load the transaction.

Retry Type. The type is long retry when the poller finds no setup data for the loop that the card belongs to. See No Setup Data, or the type is short retry when there are system problems preventing loading.

Time Stamp. Time stamp is the system-generated date and time when a transaction was recorded. This is not necessarily the same as effective-date which is user-specified.

Customer. Customer is the name or description of the customer that owns the loop that the card belongs to.

Setup Data is Missing

When loading kanban transaction data, if the poller encounters a transaction on a card for which there is no loop setup data, it places the transaction in the retry queue with the status LONG_RETRY. The next time that the poller loads loop setup data—no more than once in each hour—the transaction is submitted again from the retry queue. After two retries, if the transaction is still not accepted by QAD Supplier Portal, it is removed from the retry queue and placed in the log with a RETRY_FAILED status.

System Problems

When loading kanban transaction data, if the poller is unable to load a transaction because of a system problem, it places the transaction in the retry queue with the status SHORT_RETRY. The next time that the poller loads transaction data—as frequently as every five minutes—the transactions in the retry queue are processed first. After processing, each transaction and status is placed in the log. If the status of a transaction is still SHORT_RETRY, it is also returned to the retry queue. There is no limit to the number of times that the poller will try to load transactions with the SHORT_RETRY status.

Item Quantities

Use Admin » Item » Item Quantities Maintenance to update manually-entered minimum, maximum, and order point quantities for multiple items simultaneously. Only customer admin users have access to this screen.

Fields are enabled for updating if one of the following is true in Admin » Item » Item —Item tab, Policy subtab:

- The Min/Max Calculation Policy and the Order Point Calculation Policy are set to Disable, use manual entries.
- The Min/Max Calculation Policy and the Order Point Calculation Policy are set to Default and those policies in Admin » Company » Company —Company tab, Policies subtab—are set to Disable, use manual entries.

Updating Item Quantities

- 1 Go to Admin » Item » Item Quantities Maintenance.
- 2 Use the filter tab, display tab, and column sorting to display the items of interest.
- 3 Manually update the required fields on the current display page. The validations that apply in Admin » Item » Item Maintenance apply here as well:
 - Minimum quantity cannot be negative
 - Maximum quantity must be equal to or greater than one
 - Maximum quantity cannot be less than minimum quantity

The values for Minimum Quantity, Order Point, and Maximum Quantity must be numbers (for example, 3 or 3.0). The values must not include non-numeric characters, spaces, or more than one decimal point.
- 4 Click Save to update the QAD Supplier Portal database with the changes on the current display page.
- 5 Display and update values on additional display pages as required.

Supplier Tasks

This section discusses the following topics:

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Purchase Order Line Acknowledgment

Suppliers use this screen to accept and change a selected PO from a customer.

Column/Field Descriptions

Except for the Acknowledge Status and Comment fields in the Purchase Order Lines section, the other fields on this screen are display only.

Purchase Order Header

Supplier. The supplier company name.

Order. The purchase order number.

Ship-To. The address code identifying where the items on the order should be delivered.

Acknowledge Status. The acknowledged state for the purchase order, such as Pending or Accepted with detail and change.

Purchase Order Lines

Line. Purchase order line number from the ERP database.

Item. The item number or code used by the supplier.

Site. The ID code for the site.

Order Qty. The quantity of the item ordered on this line.

Unit Cost. This is the unit cost from the line item.

Due Date. The date when the item is due to be received at the specified site.

Acknowledge Status. The acknowledged state for the purchase order line. You select the acknowledged state you want to assign to the purchase order line from the list.

Comment. Link: Click the link icon to display the Add/Edit Purchase Order Line QAD Supplier Portal Comment screen. Any comment you assign then appears here.

Changing a Purchase Order to Accept with Detail and Change

You can accept in full or reject a purchase order by clicking on the Accept in Full button or the Reject button. However, clicking the Accept with Detail and Change button involves designating the status for each purchase order line, and working with two other screens. The following steps apply when you are logged in as a supplier.

- 1 Click on the Orders tab in QAD Supplier Portal.
Purchase orders are displayed.
- 2 Click on the Order number you want.
The Purchase Order Detail screen appears.

The Acknowledged Status field in the Purchase Order Header shows the acknowledged state for the purchase order. The Acknowledged Status field in the Purchase Order Lines section shows the acknowledged state for each line of the purchase order.

- 3** Click on the Accept with Detail and Change button.
The Purchase Order Line Acknowledgment screen appears.
- 4** Select the acknowledged state on the Acknowledge Status drop-down list for each purchase order line.
- 5** Optionally, click on the Comment icon to display the Add/Edit Purchase Order Line QAD Supplier Portal Comment screen.
Any comment entered and saved for the line appears in the comment field for that line.
- 6** Click the Save button.

The Acknowledge Status field in the Purchase Order Header is changed to Accepted with detail and change. The Acknowledge Status field for all purchase order lines is changed to show the selected acknowledged state for that line.

Importing Shipping Forecasts

Suppliers can import shipping forecast data from XML or flat files. QAD Supplier Portal displays the data in Schedules » Shipping Forecasts.

Shipping forecast records in the import file create new records and overwrite existing shipping forecast records in QAD Supplier Portal; an information message informs users that records are updated. Imported forecasts cannot be updated in QAD Supplier Portal.

QAD Supplier Portal Importing Process

QAD Supplier Portal does the following when importing files:

- 1** Transfers the specified file to the server.
- 2** Determines the file format: XML or flat.
- 3** If the file is flat format, converts it to XML.
- 4** Passes the imported or converted XML file to the XML parser.
- 5** Validates the XML file against the appropriate DTD and any additional business rules.
- 6** Loads the data from the XML file into the QAD Supplier Portal database to update existing records and create new records.
- 7** Displays error, warning, and information messages as specified by the user.

Shipping Forecast Tasks

Creating Flat Import Files with a Spreadsheet

The Import Shipping Forecast workbook requires Microsoft Excel 97 or later.

- 1 Review the setting for CSV Delimiter specified on the Preferences subtab of the User tab in Admin » User Maintenance.
- 2 Review the file formats and validation criteria in the Reference section:
 - Flat file format
 - Validation and conversion

The tilde-delimiter validations apply to the comma-delimited output from the Import Shipping Forecast workbook.
- 3 Save the workbook to your system:
 - a Click this link to display the [Import Shipping Forecast](#) workbook.
Note You must click the link from the online help system within the QAD Supplier Portal product to access the workbook file.
 - b Use File|Save As to save the workbook to your system.
- 4 Close the workbook in the browser.
- 5 Open and review the workbook on your system:
 - The first worksheet has general information about the workbook and how to use it.
 - The next worksheet is an example.
 - The final worksheet is a blank form.
- 6 Copy the form to a new worksheet:
 - a Go to the Form worksheet.
 - b In the Edit menu, select Move or Copy Sheet... to open the Move or Copy dialog.
 - c In the Before sheet list box, select Form.
 - d Click in the Create a copy check box.
 - e Click OK.
- 7 Enter your shipping forecast data in the new form worksheet.
- 8 Save the shipping forecast data as a comma-delimited flat file. With the completed form displayed:
 - a From the File menu, select Save As.
 - b From the Save as type list box, select CSV (Comma delimited)(*.csv).
 - c Click Save.
 - d Excel displays a Caution window; click OK to save the current sheet.

- 9 Go to the [Importing Shipping Forecasts](#) task.

Creating Flat Import Files with a Text Editor

Use any text editor to create the tilde-delimited flat file.

- 1 Review the file formats and validation criteria in the Reference section:
 - Flat file format
 - Validation and conversion

The tilde-delimiter validations apply to the comma-delimited output from the Import Shipping Forecast workbook.
- 2 Create the flat file using your shipping forecast data and following the example.
- 3 Check the data against the format notes:
 - In Timestamp fields, the time component defaults to 00:00:00 if it is not specified.
 - Timestamp fields must be specified as:
 - YYYY-MM-DD hh:mm:ss or YYYY-MM-DD
 - where:
 - YYYY is the four digit year
 - MM is the month number: 1-12
 - DD is the day of the month: 1-31
 - hh is the hour of the day: 0-24
 - mm is the minute of the hour: 0-59
 - ss is the second of the minute: 0-59
 - Decimal and integer numeric values must be represented without a thousands separator: 1000.00 and 1000.
 - Decimal values must use a period as the decimal separator.
 - Valid values for the Status field are: open, incomplete, received.
- 4 Save the file.
- 5 Go to the [Importing Shipping Forecasts](#) task.

Creating XML Import Files

Use any text editor to create the XML file.

- 1 Review the DTD and validation criteria in the Reference section:
 - DTD
 - Validation criteria
- 2 Create the XML file using your shipping forecast data and following the DTD.
- 3 Save the file.
- 4 Go to the [Importing Shipping Forecasts](#) task.

Importing Shipping Forecasts

There are three methods for creating shipping forecast files to import: spreadsheet, flat text file, and XML.

QAD Supplier Portal generates messages when it encounters problems during import.

Import appropriately formatted shipping forecast data.

- 1 Go to Schedules » Shipping Forecasts.
- 2 Click Import to display the Import File dialog.
- 3 Select the desired shipping forecast data file from the File box.
- 4 Click in the messages check boxes—Display Warnings, Display Information Messages—to specify which messages to print to the log.
- 5 Click Load to load the shipping forecasts in the selected file into QAD Supplier Portal and display the specified messages resulting from the load.

When QAD Supplier Portal receives a command to load a file, it follow this procedure:

- 1 Transfers the specified file to the server.
- 2 Determines the file format: XML or flat.
- 3 If the file is flat format, converts it to XML.
- 4 Passes the imported or converted XML file to the XML parser.
- 5 Validates the XML file against the appropriate DTD and any additional business rules.
- 6 Loads the data from the XML file into the QAD Supplier Portal database to update existing records and create new records.
- 7 Displays error, warning, and information messages as specified by the user.

Reviewing the Shipping Forecast Import Log

Use the import log for import tracking and debugging.

- 1 Go to Schedules » Shipping Forecasts.
- 2 Click Import to display the Import File dialog.
- 3 Click in the messages check boxes—Display Warnings, Display Information Messages—to specify which messages to display.
- 4 Click View Log to display the specified messages from the last five file loads.

Reference

Flat File Format

The shipping forecast flat file has one table: ShippingForecast.

The following table shows the permitted field names, the required field names, and the data type for those fields with a validated data type. All other fields are assumed to be of the string data type.

Permitted Field Names	Required	Validated Data Types
PurchaseOrderNumber	X	
PurchaseOrderLine	X	
ShipDate	X	Timestamp
ShipToID	X	
DeliveryDate		Timestamp
Quantity		Decimal
UM	X	
Reference		
CumQuantity		Decimal
CustomerItemID		
CustomerPlaceID		
ReleaseID	X	
PriorCumDate		Timestamp
PriorCumQuantityShipped		Decimal

- In Timestamp fields, the time component defaults to 00:00:00 if it is not specified.
- Timestamp fields must be specified as:
- YYYY-MM-DD hh:mm:ss or YYYY-MM-DD.
- Decimal and integer numeric values must be represented without a thousands separator: 1000.00 and 1000.
- Decimal values must use a period as the decimal separator.

Flat File Example

The following is a brief example of a shipping forecast flat file. Note that the table is introduced by ##, and the line following the table name is a tilde-delimited list of the field names (columns) in that table:

```
##ShippingForecast
PurchaseOrderNumber~PurchaseOrderLine~ShipDate~ShipToID
~DeliveryDate~Quantity~UM~Reference~CumQuantity
~CustomerItemID~CustomerPlaceID~ReleaseID
~PriorCumDate~PriorCumQuantityShipped
adl-po-1~2002-02-25~adl2000~2002-02-27~10.0~EA-SF #1~0.0~~~rel 1~~
bgl-1~2002-02-27~10000~2002-02-28~20.0~EA-SF #2~0.0~000001~10000~rel 2~~
po5721~1~2002-02-29~JPS~2002-03-01~30.0~EA-SF #3~0.0~00001~10000~rel 3~~
po5721~2~2002-02-29~JPS~2002-03-01~30.0~EA-SF #4~0.0~00001~10000~rel 4~~
po5754~1~2002-02-29~002~2002-03-01~30.0~EA-SF #5~0.0~000001~10000~rel 5~~
```

Flat File Validation and Conversion

This section has the validation rules for shipping forecast flat files and a conversion summary.

Validation

To be successfully processed by the flat file to XML converter, submitted flat files must pass all of the following validations:

- The first line in the flat file must contain two pound signs (##) followed by the name of the table; for example, ##ShippingForecast.
Error: First line must contain the table name prefixed with ##.
- Each table specification—##tablename—must be a valid table.
Error: Table tablename is not an expected table.
- The second line in the flat file must contain a tilde (~) delimited list of fields names; one for each data column.
Error: No column names found.
- Field names (columns) specified as required must be included in the flat file.
Error: Required column field name not found.
- Only permitted field names (columns) can be included in the flat file.
Error: Column field name is not in the list of possible field names.
- In each data row, the number of tilde (~) delimited data elements must match the number of field names (columns) defined for that table.
Error: Wrong number of data elements in line; expected expected# but received provided#.
- Data provided for an integer field must be a valid integer value.
Error: Integer value expected for column but value entered.
- Data provided for a logical field must be a valid logical value.
Error: Boolean value expected as true or false for column but value entered.
- Data provided for a timestamp field must be a valid timestamp value.
Error: Date/time value expected as YYYY-MM-DD or YYYY-MM-DD HH:MM:SS for column but value entered.

Conversion

Once the data has passed all of the validations, it is output in XML format with each field as an XML attribute. The output file name is the input file name with the .xml extension. The output XML file is passed to the Shipping Forecast XML parser.

Note The conversion sets the case for field names in the generated XML; the case used in the flat file is ignored.

XML File DTD

Required attributes are denoted with: #REQUIRED; all other attributes are optional.

```
<?xml version="1.0" encoding="UTF-8"?>

<!-- DTD for supplier load of Shipping Forecast data from XML file -->
<!ELEMENT ShippingForecast EMPTY>

<!-- Required fields -->
<!ATTLIST ShippingForecast PurchaseOrderNumber CDATA #REQUIRED>
```



```

<!-- ShippingForecast PurchaseOrderLine CData #REQUIRED -->
<!-- ShippingForecast ShipDate CData #REQUIRED -->
<!-- ShippingForecast ShipToID CData #REQUIRED -->
<!-- ShippingForecast UM CData #REQUIRED -->
<!-- ShippingForecast ReleaseID CData #REQUIRED -->

<!-- Optional fields -->
<!-- ShippingForecast CustomerItemID CData #IMPLIED -->
<!-- ShippingForecast CustomerPlaceID CData #IMPLIED -->
<!-- ShippingForecast DeliveryDate CData #IMPLIED -->
<!-- ShippingForecast Quantity CData #IMPLIED -->
<!-- ShippingForecast Reference CData #IMPLIED -->
<!-- ShippingForecast CumQuantity CData #IMPLIED -->
<!-- ShippingForecast PriorCumDate CData #IMPLIED -->
<!-- ShippingForecast PriorCumQuantityShipped CData #IMPLIED -->

<!-- ShippingForecastLoad (ShippingForecast+) -->

```

XML Parser

The XML file—imported or converted from flat format—is processed through a custom XML parser Java class: `eqsv.dataload.ShippingForecastLoad`. The parser uses two passes to load a file:

- The first pass validates against the DTD for required and available fields.
- The second pass performs business validations and creates new records or updates existing records. Existing records are determined based on the primary business keys: PurchaseOrderNumber, PurchaseOrderLine, and ShipDate.

QAD Supplier Portal performs these validations:

Field	Validation	Message	Result
{file name}	Must end with .xml	ERROR: File loaded does not have required .xml suffix	XML file is not processed
{none}	No DTD errors	WARNING: Errors encountered during validation of XML file - no records processed	XML file is not processed
CumQuantity	Non-zero CumQuantity value must have specify PriorCumReq	ERROR: Cumulative quantity specified without prior cumulative quantity for getUniqueID()	ShippingForecast record is not processed
Quantity	Quantity value must be greater than zero	ERROR: Quantity of quantity is less than or equal to zero for getUniqueID()	ShippingForecast record is not processed
{record}		INFO: Updated shipping forecast for getUniqueID()	Denotes that an existing ShippingForecast record has been updated

{record}		INFO: Shipping forecast not updated for getUniqueID()	Denotes that errors occurred while processing record which caused record to not be updated (see resulting error messages)
{record}		WARNING: Existing shipping forecast not found (possibly deleted)	Another user may have deleted the ShippingForecast during XML parsing
{record}		INFO: Created shipping forecast for getUniqueID()	Denotes that a new ShippingForecast record has been created
{record}		INFO: New shipping forecast not created for getUniqueID()	ShippingForecast record was not created due to errors (see resulting error messages)
{XML}	Must pass DTD validation	ERROR: (XML) location: message	XML file is not processed
ShipToID	Ship-to address must match ship-to address on purchase order	ERROR: Ship-to address ShipToAddressID does not match ship-to address on purchase order ('POShipToAddressID')	ShippingForecast record is not processed
UM	Unit of measure must match unit of measure on PO line	ERROR: Unit of measure UM does not match unit of measure on purchase order line PONumber/POLine ('POUM')	ShippingForecast record is not processed
CustomerItemID	ItemID must match customer's item ID for PO line	ERROR: Customer item ItemID does not match customer item on purchase order line PONumber/POLine ('POItemID')	ShippingForecast record is not processed
CustomerPlaceID	PlaceID must match customer's place ID for PO line	ERROR: Customer place PlaceID does not match customer place on purchase order line PONumber/POLine ('POPlaceID')	ShippingForecast record is not processed
PurchaseOrderNumber	Order number must match an open purchase order number for this supplier	ERROR: Purchase order not found for order number PONumber	ShippingForecast record is not processed

PurchaseOrderLine	Order line must match a purchase order line for an open purchase order	ERROR: Purchase order line not found for order PONumber/POLine	ShipForecast record is not processed
PurchaseOrderLine CustomerItemID CustomerPlaceID	PurchaseOrderLine or CustomerItemID/CustomerPlaceID must be provided for a shipping forecast line to match to a purchase order	ERROR: Purchase order line or customer item ID/customer place ID not found for this purchase order number: PurchaseOrderNumber	ShipForecast record is not processed
{XML}	XML attributes specified as required in the DTD must be provided	ERROR: Attribute attribute is a required attribute at location	XML file is not processed
{XML}	Attributes must be from the list provided in the DTD	ERROR: Attribute attribute is not an available attribute at location	XML file is not processed
{XML}	Elements must match elements specified in the DTD	ERROR: Element element is not declared at location	XML file is not processed
{XML}	DTD specifies that at least one ShippingForecast element must be provided	ERROR: At least one element is required at location	XML file is not processed

Printing Kanban Cards

Use the Print tab on Inventory » Kanban » Board to print cards for kanban that are empty and authorized for replenishment.

When users scan printed kanban cards during any transaction except authorize or consume, the transaction confirms to QAD Supplier Portal that the card printed correctly. Cards that did not print correctly are eligible for reprinting.

Printing and Reprinting Cards

1 Go to Inventory » Kanban » Board.

2 Go to the appropriate subtab:

Print » Print Cards displays loops that meet these conditions:

- They satisfy the criteria currently set on the Filter subtab.
- They have cards in the printable state, that is, the cards have not been printed since the latest authorize transaction.

Print » Reprint Cards displays loops with cards that meet these conditions:

- The cards were previously selected for printing.
- There is no confirmation—through transaction entry—that the cards printed correctly.

- 3 Use the buttons and icons to select cards to print or reprint:
 - Click the expand/collapse icons for the loops. Expand displays all of the printable cards for the loop; collapse displays only the loop, this is the default.
 - Click the check boxes or Select All to select individual or all cards, respectively, for printing. For collapsed loops, the check box selects all printable cards in the loop. For expanded loops, each card has a separate check box.
- 4 Click Print Cards to print the cards to an Acrobat PDF document.
- 5 Print the PDF document from a browser.
- 6 Distribute the kanban cards to the appropriate work centers

Auto Download Installation

The auto download function of QAD Supplier Portal provides automatic updates on net changes to Purchase Orders and Schedules from the ERP. It is enabled and configured on the “Supplier Maintenance” or “Company Maintenance” page. The fields (and their valid values) that are autdownloaded are described in “Auto Download Fields and Values”. This topic describes how to install the Auto Download Tool Client.

To use the Auto Download function, an Auto Download Tool Client must be installed. There are two versions of the client:

- Graphical User Interface (GUI), which can be run in Windows environments.
- Character User Interface (CHUI), which can be run in Windows, DOS, and Linux environments.

Prerequisites

The Java Runtime Environment is required to run the Auto Download Tool Client:

- Graphical User Interface (GUI) requires JRE 6.0 or greater
- Character User Interface (CHUI) requires JRE 1.4.2 or greater.

Files

The Auto Download Tool Client is packaged in a ZIP file. The contents of the ZIP file for each version are:

Version	File	Description
GUI	SV-AutoSync-Client.exe	Main client program
	config.properties	Configuration file
CHUI	startup.bat	Start batch file for DOS
	startup.sh	Start script for Linux
	SV-AutoSync-Client.jar	Main client program package
	config.properties	Configuration file

Configuration

The `config.properties` file must be configured with the following information before running the Auto Download Client Tool:

<code>autosync.username=</code>	Required. Enter a valid user ID
<code>autosync.password=</code>	Required. Enter the password associated with the user ID
<code>autosync.downloadTo=</code>	Optional. Specify a folder in which updates will be stored. If not specified, a folder called <code>download</code> will be created in the client installation directory automatically.

Note The interval at which the auto sync download occurs is set on the “Supplier Maintenance” or “Company Maintenance” page.

Execution

To run the Auto Download Client Tool:

GUI	Double-click on <code>SV-AutoSync-Client.exe</code> .
CHUI	In DOS/Windows: Double-click or run <code>startup.bat</code> . In Linux: Invoke <code>startup.sh</code> . Give the shell script execute rights prior to invoking.

To run the Auto Download Client Tool:

GUI	When the client is running, an icon appears on the Windows Notification bar. Right-click the icon and select Close from the menu that displays.
CHUI	Kill the process at the command line or by using CTRL-C if it is foregrounded.

Notifications

When updates are downloaded, the following notifications will be given by the Auto Download Client Tool:

GUI	When the client is running, an icon appears on the Windows Notification bar. When updates are downloaded, a message box displays.
CHUI	When updates are downloaded, a text message displays.

Logging

When the Auto Download Client Tool checks the server for updates, a log file is created in the log directory in the client installation folder.

Auto Download Fields and Values

The auto download function of QAD Supplier Portal provides automatic updates on net changes to purchase orders and schedules from the ERP. It is enabled and configured on the “Supplier Maintenance” or “Company Maintenance” page. Installation of the Auto Download Tool Client is described in “Auto Download Installation”. The fields (and their valid values) that are autodownloaded are described in this topic.

There are two sets of fields automatically updated through Auto Download:

- Purchase Order
- Schedule

Purchase Order Fields and Values

Status	
1	Open
2	Closed
3	Canceled
4	Inactive
Scheduled	
0	No
1	Yes
3	S
4	M
Type	
1	I
2	B
3	S
4	M
Acknowledge Status	
0	Pending
1	Accepted in Full
3	Rejected
4	Item Accepted and Shipped
5	Item Accepted with Date Rescheduled
6	Item Accepted
7	Item Accepted with Changes
8	Item Deleted
9	Item Accepted With Price Change
10	Item Accepted With Quantity Change
11	Re-Acknowledge
PO Header Comments	
0	No
1	Yes
PO Line Comments	
0	No
1	Yes

Schedule Fields and Values

Supplier Schedule Type	
1	Aggregate

2	Planning
3	Shipping
4	Forecast
Release Status	
1	Active
2	Inactive
Quantity Qualifier	
F	F
P	P

Subscription Agreement

This chapter includes the text of the QAD Supplier Portal Subscription Agreement, which customers acknowledge during QAD Supplier Portal installation.

QAD SUPPLIER PORTAL SUBSCRIPTION AGREEMENT
Version 6 – Effective 6/6/2013

Article 1 Subscription Rights Provided

1.1 Subscription Rights. This QAD Supplier Portal Subscription Agreement (hereinafter “Agreement”) is between you and either QAD Inc. or the appropriate QAD Inc. subsidiary or affiliate which is responsible for the territory in which you are located (hereinafter referred to as “QAD”). QAD headquarters are at 100 Innovation Place, Santa Barbara, California, 93108 USA. QAD agrees that you and your suppliers may subscribe to a manufacturing exchange utilizing certain software (hereinafter the “Software”) provided in a hosted Internet environment through the QAD website www.MFGx.net (hereinafter the “QAD Supplier Portal”). Your use of the QAD Supplier Portal is subject to the terms of this Agreement as further set forth in the Terms of Use - Attachment A and Terms Of Use For Global Product Data Synchronization Hosted Service - Attachment B. You hereby represent and warrant that by using the QAD Supplier Portal:

- (i) YOU HAVE THE PROPER AUTHORITY TO ENTER INTO THIS AGREEMENT;
- (ii) YOU HAD THE OPPORTUNITY TO READ THIS AGREEMENT PRIOR TO ACCEPTING IT AND YOU FULLY UNDERSTAND THIS AGREEMENT AND AGREE TO BE BOUND BY ALL SUCH TERMS, CONDITIONS AND OBLIGATIONS CONTAINED HEREIN;
- (iii) THIS AGREEMENT IS BEING FORMED ELECTRONICALLY WITH THE CONSENT OF BOTH YOU AND QAD, AND;
- (iv) YOU MADE A COPY OF THIS AGREEMENT FOR YOUR RECORDS.

Article 2 Use of the QAD Supplier Portal

2.1 Use. Upon your acceptance of the terms and conditions contained in this Agreement, and in consideration of the Subscription Fee (as defined herein) to be paid, QAD grants to you non-exclusive access during the term of this Agreement, to use the QAD Supplier Portal.

2.2 Ownership Rights. You shall not acquire any rights of ownership in the Software or any hardware or any information or content provided by QAD which are used to provide the QAD Supplier Portal. You acquire only the right to use the QAD Supplier Portal subject to the terms of this Agreement.

2.3 QAD Obligations. QAD shall:

- a. provide the QAD Supplier Portal as described herein.
- b. make available to you documentation describing the use of the QAD Supplier Portal.
- c. provide maintenance for the QAD Supplier Portal as provided herein.

2.4 Your Obligations. You shall:

- a. be responsible for providing your own “business grade” communication lines and access to the Internet between your location(s) and the location where the QAD Supplier Portal is provided, at your expense.
- b. assign a person(s) who shall act as the primary contact with QAD with respect to problem determination and who shall be familiar with the requirements for the operation of the QAD Supplier Portal (such as physical connections to servers, printers and workstations).
- c. use the QAD Supplier Portal only as instructed in the documentation provided by QAD.
- d. not modify the Software or the QAD Supplier Portal in any way and/or install additional software.
- e. not remove any copyright or proprietary rights notice or identification which indicates the ownership of the Software used in the QAD Supplier Portal from any part of the Software or the QAD Supplier Portal.
- f. be responsible for your and your supplier’s use of MFGx.net.
- g. not use the QAD Supplier Portal for any purpose not authorized by this Agreement.
- h. be solely responsible for evaluation, selection, and for the results obtained from the QAD Supplier Portal. QAD makes no claims that the QAD Supplier Portal is suitable for your application and is not responsible for such.
- i. allow QAD and QAD subcontractors to retain source documents.
- j. maintain adequate backup procedures that will allow you to recover your data without resort to the QAD Supplier Portal; and
- k. obtain any required third party approvals for the transmission of data.

2.5 Third Party Agreements. QAD is not a party to, third party beneficiary of, or a guarantor of performance with respect to any subsequent agreement between you, your suppliers, and any third party. You agree that QAD is not responsible for the terms and conditions governing the purchase, sale, quality, or delivery of any goods or other services available through your use of the QAD Supplier Portal.

2.6 Availability. You acknowledge that the availability of the Internet depends upon many factors, including the quality of your connection to the Internet, the availability of the Internet and the Internet backbone, and equipment that, by its nature, is not fault tolerant. QAD expressly disclaims any representation or warranty that the access or use of the QAD

Supplier Portal will be error-free, completely secure or uninterrupted. However, QAD agrees that the use of the QAD Supplier Portal will be reasonably available. Use of the QAD Supplier Portal is not available during scheduled server backup and maintenance times or unscheduled outages. You agree that QAD retains the right, if necessary, to schedule downtimes at critical times. QAD shall restore use of the QAD Supplier Portal as promptly as commercially reasonably possible and inform you of any such outages with reasonable promptness. QAD shall promptly investigate any problems that you report to QAD.

2.7 High Risk Activities. The QAD Supplier Portal is not fault-tolerant and is not designed, manufactured, or intended for use in hazardous environments requiring fail-safe performance AD and its affiliates, agents, content providers, service providers, and licensors specifically disclaim any express or implied warranty of fitness for high risk activities.

Article 3 Subscription Fee and Payment Terms

3.1 Subscription Fee. In consideration for the rights herein granted by QAD to you and the other undertakings of QAD contained herein, you agree to pay the current fees in effect during the time you use the QAD Supplier Portal and to pay such fees in accordance with the payment method you select at the time you subscribe to the QAD Supplier Portal as noted on the MFGx.net website (the "Subscription Fee"). Unless terminated, as provided herein, the Subscription Fee is payable whether you use the QAD Supplier Portal or not.

3.2 Fee Exclusions. The Subscription Fee does not include any taxes. You shall make no deductions for taxes of any kind, including withholding taxes, from any payment to QAD under this Agreement. You shall pay any and all taxes and similar or related fees (such as, but not limited to, sales, use, value added, customs duties and import fees) including any expenses, interest and penalties related thereto. If you are required by law to withhold taxes from the Subscription Fee, then you shall pay QAD a gross amount of money, such that the net amount received by QAD (after deducting or withholding the required taxes) is equal to the amount of the Subscription Fee originally owed before subtracting withholding taxes. Taxes on the net income of QAD are the responsibility of QAD.

3.3 Current Policies. The Subscription Fee shall be based upon the current pricing and other policies of QAD in effect during the time you use the QAD Supplier Portal. Such pricing and policies are subject to change at any time at the sole discretion of QAD. Such changes shall only apply to subsequent subscription renewals. If you disagree with any pricing or policy change, you may terminate your use of the QAD Supplier Portal as provided herein.

3.4 Failure To Make Payment. QAD shall not be obligated to provide you access to the QAD Supplier Portal until any payment due QAD has been received by QAD. Your failure to pay when payment is due, or the subsequent dishonoring of any credit card, check or draft, shall constitute a material breach hereunder. All payments shall be made in US dollars, unless otherwise explicitly agreed upon by QAD during your subscription to the QAD Supplier Portal. QAD reserves the right to assign the invoicing or the collection of payments to other subsidiaries of QAD and you hereby expressly agree to such assignment.

3.5 Preprinted Purchase Order Terms and Conditions. If it is necessary for you to issue a purchase order to subscribe to the QAD Supplier Portal, you agree that the pre-printed terms and conditions on the face and reverse side of such purchase order are not part of this Agreement nor will it form any subsequent or further agreement between you and QAD.

Article 4 Change in Use of the QAD Supplier Portal

4.1 Change in Use of the QAD Supplier Portal. QAD may, in its sole discretion, modify the QAD Supplier Portal at any time, without notice.

Article 5 Other QAD Services

5.1 Other QAD Services. As part of this Agreement, you may desire QAD to provide certain training, implementation, or other consulting services that are not a part of your access to the QAD Supplier Portal. Such services are not included in the Subscription Fee. If you desire QAD to provide such additional services, you and QAD shall enter into a separate services agreement.

Article 6 Subcontracting

6.1 Subcontracting. QAD may subcontract the provision of the QAD Supplier Portal to subcontractors selected by QAD.

Article 7 Warranty

7.1 "As Is" Warranty. QAD MAKES NO REPRESENTATIONS OR WARRANTIES OF ANY KIND, EITHER EXPRESSED OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, ACCURACY, INFORMATIONAL CONTENT, QUIET ENJOYMENT, SYSTEM INTEGRATION, AND NON-INFRINGEMENT. QAD SUPPLIER PORTAL IS PROVIDED ON AN

"AS IS" AND "AS AVAILABLE" BASIS. QAD DOES NOT MAKE ANY WARRANTIES REGARDING THE AVAILABILITY OF QAD SUPPLIER PORTAL. QAD DOES NOT WARRANT THAT QAD SUPPLIER PORTAL WILL BE UNINTERRUPTED OR IS ERROR FREE. YOU ACKNOWLEDGE THAT QAD SUPPLIER PORTAL MAY BE UNAVAILABLE FROM TIME TO TIME. YOU ASSUME TOTAL RESPONSIBILITY AND RISK FOR YOUR USE OF QAD SUPPLIER PORTAL.

Article 8 Security and Confidentiality

8.1 Security. Use of the QAD Supplier Portal will be protected by access codes and passwords. QAD shall assign an access code and password to one individual at your company who shall then assign access codes and passwords to employees and suppliers you authorize to access the QAD Supplier Portal. You are responsible for the confidentiality and security of the access code and password once received from QAD and during any transmissions by you to prevent unauthorized access to the QAD Supplier Portal. QAD shall provide reasonable protection from unauthorized access.

If there is a breach of security through your account, you shall immediately notify QAD in writing and QAD will change, or cause to be changed, any affected access codes and passwords and you agree to change such access codes and passwords. QAD is not responsible for lapses in online security outside the control of QAD and does not assume liability for improper use of your information by a third party outside the control of QAD.

8.2 Data Protection Laws. Each party is responsible for complying with their respective obligations under the applicable data protection law(s) governing your data. QAD agrees to use your information in accordance with the QAD privacy policy applicable to personally identifiable user data.

8.3 Submission of Information by You or Your Suppliers. If you or your suppliers submit information to the QAD Supplier Portal, you and your suppliers grant QAD and QAD subcontractors a nonexclusive, worldwide, royalty-free license to link to, utilize, use, copy, exploit, and prepare derivative works of the submitted information to assist QAD and QAD subcontractors i) in carrying out their obligations under this Agreement, ii) in providing better or complementary or ancillary products and services and, iii) to market QAD and QAD subcontractor's products and services to you in the future. You may at any time give written notice to QAD that you do not wish QAD or QAD subcontractors to make use of such information as noted above. YOU RETAIN OWNERSHIP OF ANY COPYRIGHTS OR OTHER INTELLECTUAL PROPERTY RIGHTS APPLICABLE TO ANY INFORMATION YOU SUBMIT TO QAD. YOUR SUPPLIERS RETAIN OWNERSHIP OF ANY COPYRIGHTS OR OTHER INTELLECTUAL PROPERTY RIGHTS APPLICABLE TO ANY INFORMATION YOUR SUPPLIERS SUBMIT TO QAD.

8.4 Monitoring the QAD Supplier Portal. You acknowledge that QAD has the right, but no obligation, to monitor the QAD Supplier Portal and to disclose any information necessary to operate such site, to protect QAD, QAD subcontractors, and providers of the content contained on the QAD Supplier Portal, and to comply with legal obligations or governmental requests. QAD reserves the right to refuse to post any information and to remove any information, including the right to remove any allegedly copyright infringing content, on the QAD Supplier Portal, in whole or in part, for any reason, at any time. QAD reserves the right to limit the use of the QAD Supplier Portal to any person, geographic area or jurisdiction as it so desires, or as required by law. QAD may discontinue hosting the QAD Supplier Portal at any time after the expiration of any then current subscription term.

8.5 Trade Secret. QAD considers the QAD Supplier Portal to be a trade secret. QAD does not disclose any confidential information to QAD competitors or potential competitors. You shall not use design code or documentation gained by access to the QAD Supplier Portal or hardware to develop, market or promote a competing service, software or hardware product.

8.6 Proprietary or Confidential Information. It is recognized that each party under this Agreement may make available to the other, proprietary or confidential information related to the business of such party. Each party shall keep confidential any information disclosed by the other party and identified as proprietary or confidential information.

The commitments pursuant to this Section 8.6 shall continue during the term of this Agreement and survive the termination of this Agreement for five (5) years.

These commitments shall cease if, but only to the extent that, the proprietary or confidential information:

- a. Is or becomes generally known or available to the public at large through no act or omission of the receiving party; or
- b. Can be demonstrated to be available lawfully to the receiving party prior to the disclosure or has thereafter been furnished to the receiving party without restrictions as to disclosure or use; or
- c. Can be demonstrated, subsequent to disclosure, to be independently developed by the receiving party without use of any proprietary or confidential information received from the

disclosing party; or

d. Is disclosed by operation of law or court order, provided that the party whose information is to be disclosed is given an opportunity to prevent such disclosure and, if disclosed, the proprietary or confidential information will only be used for the specified legal purposes.

Article 9 Infringement

9.1Infringement. If you are sued for copyright violations for the authorized use of the QAD Supplier Portal as provided under this Agreement, then QAD shall defend you if you agree to the following conditions:

- a you must notify QAD within ten (10) days of any suit or claim served on you;
- b you must let QAD defend, compromise, or settle the claim, and;
- c you must give QAD requested information and assistance.

QAD will not protect you against suit if you use the QAD Supplier Portal with any software product if the use without that product would not cause a copyright violation. You shall have no authority to defend or settle any claim or suit on behalf of QAD.

9.2Entire Liability. THIS ARTICLE 9 STATES THE SOLE AND EXCLUSIVE LIABILITY OF QAD WITH RESPECT TO INFRINGEMENT OF COPYRIGHTS, TRADE SECRETS, PATENTS AND OTHER INTELLECTUAL PROPERTY RIGHTS AND QAD SHALL HAVE NO ADDITIONAL LIABILITY WITH RESPECT TO ANY ALLEGED OR PROVEN INFRINGEMENT.

9.3QAD Indemnification. You shall defend, indemnify, and hold QAD harmless from and against any liabilities arising out of: (i) your unauthorized use of the QAD Supplier Portal that infringes, or allegedly infringes, on the proprietary rights (including but not limited to intellectual property rights) of a third party; (ii) any claim that your data was compromised because of a failure by you to provide adequate security; (iii) any claim that your data or your use of the QAD Supplier Portal violates any laws or regulations, or any third party's rights; and (iv) any dispute between you, your suppliers, your customers, or any other third party pertaining to the QAD Supplier Portal with respect to the use of the QAD Supplier Portal, or access to or inability to access, or unauthorized access to the QAD Supplier Portal including, without limitation, claims, actions, suits or proceedings alleging fraud, breach of security, noncompliance with laws, breach of contract or negligence by you.

Article 10 Limitation of Liability

10.1Damages. TO THE MAXIMUM EXTENT PERMITTED BY THE APPLICABLE LAW, IN NO EVENT SHALL QAD BE LIABLE FOR ANY LOST REVENUES OR PROFITS OR OTHER SPECIAL, INDIRECT, INCIDENTAL, CONSEQUENTIAL OR PUNITIVE DAMAGES HOWEVER CAUSED AND REGARDLESS OF THEORY OF LIABILITY, EVEN IF QAD HAS OR SHOULD HAVE HAD ANY KNOWLEDGE, ACTUAL OR CONSTRUCTIVE, OF THE POSSIBILITY OF SUCH DAMAGES.

10.2Subscription Fee Limitation. Except for the indemnification provisions of Article 9, the maximum liability of QAD for damages shall be limited to the Subscription Fee paid by you to QAD under this Agreement during the previous six (6) months prior to the date a claim arises.

10.3Loss of Data. QAD shall have no liability for any transactions which fail because of misdirected, delayed, unauthorized, counterfeit, or otherwise disputed transmissions. QAD shall have no liability for lost data.

Article 11 QAD Maintenance Obligations

12.1Maintenance. In consideration for payment of the Subscription Fee, QAD agrees to provide the following maintenance:

- a. QAD will provide the latest version of the QAD Supplier Portal on the MFGx.net website, but the Subscription Fee does not include any additional services, if required, in order for you to convert from one version to another.
- b. QAD offers an automated web knowledge base, and call tracking support system through its website <http://www.QAD.com>. You agree to use such web based services prior to calling QAD for assistance. You agree to inform your suppliers that the only support they may use are the web based support services. If your suppliers require additional support, they may contract with QAD for such support by paying an additional support fee.
- c. QAD or QAD subcontractors shall provide telephone assistance in the English language (or local language if provided by a local subcontractor) and you shall have access to the QAD website on matters pertaining to the QAD Supplier Portal. Telephone assistance shall be available to you during normal business days which generally are from 9 a.m. to 5 p.m., Monday through Friday, excluding holidays.

12.2Your Cooperation. You shall provide to QAD reasonable debugging information and shall cooperate in investigating errors (such as allowing access to your production database, with reasonable notice, during normal business hours, for test and debugging purposes) to duplicate an error, certify that the error is directly related to the QAD Supplier Portal, and verify that the error has been corrected. QAD shall keep any proprietary or confidential information accessed during such sessions confidential in accordance with the terms of this Agreement. You shall, at your expense, acquire and maintain any necessary dial-in software or diagnostic tool products necessary in order to allow QAD access to your production database. If you fail to provide access as noted herein, and QAD is required to provide on site services, you shall reimburse QAD at QAD's per diem rate in effect at the time the site services are performed, plus reasonable travel and living expenses.

Article 13 Term and Termination

13.1Term. This Agreement shall remain in effect for as long as you continue to pay the Subscription Fee unless otherwise terminated earlier as provided herein. You may terminate your access to the QAD Supplier Portal at any time for any reason upon providing QAD thirty (30) days advance written or electronic notice. You are not entitled to a refund of any portion of the Subscription Fee paid if you terminate your access to the QAD Supplier Portal prior to the end of the term you selected at the time you subscribed to the QAD Supplier Portal. QAD may terminate your access to the QAD Supplier Portal for any reason upon providing you thirty (30) days advance written or electronic notice. If QAD terminates your access to the QAD Supplier Portal for the convenience of QAD prior to the expiration of the term you selected at the time you subscribed to the QAD Supplier Portal, QAD shall refund the prorated portion of the Subscription Fee paid related to the period of time access to the QAD Supplier Portal was unavailable, which shall be your sole and exclusive remedy for such termination. If QAD terminates your access to the QAD Supplier Portal for your breach of any obligation under this Agreement, QAD reserves all available remedies available to QAD at law or equity.

13.2Consequences of Termination. In the event of termination or expiration of this Agreement, you shall:

- a. immediately discontinue all use of any Software and the QAD Supplier Portal;
- b. within fourteen (14) days of termination or expiration of this Agreement destroy any copies of the QAD Supplier Portal, any Software and any other information supplied under this Agreement whether designated proprietary or not and confirm in writing that all and any copies and mentioned material are destroyed; and
- c. pay to QAD within thirty (30) days from the effective date of the termination, any unpaid portion of the Subscription Fee, unless termination is due to a breach by QAD.

In the event of termination or expiration of this Agreement, QAD shall, after sixty (60) days, delete any of your or your supplier's data from the servers hosting the QAD Supplier Portal.

Article 14 Miscellaneous

14.1Law Applicable To This Agreement. This Agreement shall be subject to, and construed in conformity with, the laws of the State of California, United States of America. Any dispute arising between the parties shall be settled by arbitration under the rules of the American Arbitration Association in Los Angeles, California, USA before a single arbitrator selected under those rules. The arbitral language shall be English. The arbitral award may be enforced in any court having jurisdiction thereof. You acknowledge and agree that notwithstanding the foregoing, neither party shall bring a legal action against the other more than two (2) years after the cause of action arose unless otherwise provided by local law without the possibility of contractual waiver or limitation.

14.2Advertising Publications. Neither party shall in any way use or apply the other party's logo, emblem, trade names, or workmark in advertisements, sales promotion, publicity, publications, or any hyperlinks or websites, or advertise or publish that they do business with each other, except with prior written consent. It is understood, however, that QAD is allowed, without your prior written consent, to incorporate your name in a QAD reference list or any public filings required by law and to issue a press release that the parties have entered this Agreement.

14.3Entire Agreement. This Agreement contains the entire agreement between the parties hereto with respect to the QAD Supplier Portal and shall supersede any and all prior communications, representations, agreements, and/or undertakings, either verbal or written, between the parties hereto in respect of the said subject matter. Any amendment or other modification of any of the terms and provisions hereof must be in writing (electronic notice is acceptable) and accepted by duly authorized representatives of the parties hereto. Notwithstanding the foregoing, continued use of the QAD Supplier Portal after QAD notifies

you of a change to this Agreement shall be deemed as your acceptance of such change.

14.4Legal Construction. To the extent that any law, statute, treaty, or regulation by its terms as determined by a court, tribunal, or other government authority of competent jurisdiction, is in conflict with this Agreement, the conflicting terms of this Agreement shall be superseded only to the extent necessary by the terms required by such law, statute, treaty, or regulation. If any portion of this Agreement shall be otherwise unlawful, void, or for any reason unenforceable, then that provision shall be enforced to the maximum extent permissible so as to affect the intent of the parties. In either case, the remainder of this Agreement shall continue in full force and effect.

14.5Waiver. The waiver by any party of a breach or default by the other party of any provision of this Agreement shall not be construed as a waiver by such party of any succeeding breach or default by the other party of the same or another provision.

14.6Assignments and Transfers. You shall not assign, or otherwise transfer, your rights or obligations under this Agreement. QAD may assign this Agreement without your consent to (i) a related company under any conditions or (ii) to an unrelated company pursuant to the sale, merger or other consolidation of QAD or any of its operating divisions.

14.7Notices. Any notices required or permitted to be given pursuant to this Agreement may be made by electronic means or in writing. Such notices shall be deemed to have been given when received and such communication is acceptable as a 'signed writing' to the extent permissible under applicable law. Communication shall be in such a manner that proof of delivery can be verified. An identification code contained in an electronic document is sufficient to verify the sender's identity and the document's authenticity. Either party shall have thirty (30) days to cure any alleged breach of this Agreement after receipt of notice from the other party. You acknowledge that it is your responsibility to assure that the software you use to communicate notice to QAD is compatible with the software used by QAD for receiving notice. Any notice shall be provided only by persons that have the authority to bind the respective company to this Agreement.

14.8Force Majeure. Neither party shall be liable for delays or nonperformance of this Agreement caused by reasons which are beyond such party's reasonable control. If performance by either party to this Agreement is delayed as aforementioned, such delay shall not be deemed a breach under this Agreement and this Agreement shall remain in full force and effect. If it shall appear that performance by either party to this Agreement will be delayed, such party shall promptly notify the other party in writing stating the cause of the delay and its expected duration and shall use commercially reasonable efforts to carry out such performance as soon as reasonably possible. If any such events prevent you from accessing the QAD Supplier Portal and continues for more than one (1) month, you may terminate your subscription to the QAD Supplier Portal upon delivery of written notice to QAD.

14.9Survival. The provisions of this Agreement which are by their nature intended to survive termination of this Agreement, will survive such termination. Such provisions include, but are not limited to, the provisions on confidentiality, intellectual property, indemnification, limitation of liability and compliance with laws.

14.10International Transactions. The original of this Agreement has been written in the English language. You hereby waive any right you may have under the laws of the country in which access to the QAD Supplier Portal is provided to have this Agreement written in the native language. The parties hereby acknowledge and agree that the U.N. Convention on Contracts for the International Sale of Goods, and the Uniform Computer Information Transactions Act shall not apply to this Agreement.

14.11Compliance with Laws. You agree to comply fully with all relevant regulations of the United States Department of Commerce, the United States Export Administration Act and regulations of any foreign country to ensure that the QAD Supplier Portal, including any related Software, documentation, and services, is not exported or re-exported in violation of law. Further, you shall not directly or indirectly export or re-export the QAD Supplier Portal, including any related Software, documentation, and services without first obtaining QAD's written approval. Diversion of the QAD Supplier Portal, including any related Software, documentation, and services from the country in which it is intended to be used (as registered at the time you entered into this Agreement) may be contrary to U.S. and other applicable laws. You represent and warrant to QAD that neither you nor your suppliers are an entity prohibited to access the QAD Supplier Portal.

14.12Notice to Government End Users. Access to the QAD Supplier Portal by any Government entity end user is prohibited unless otherwise agreed in writing by QAD or required by law.

ATTACHMENT A

TERMS OF USE

You are only authorized to use of the QAD Supplier Portal to provide data to, and access data from, your suppliers for your own internal business purposes and you shall not:

1. use the QAD Supplier Portal for fraudulent or illegal purposes or creating a false identity or forgery or use the QAD Supplier Portal in connection with chain letters, junk e-mail, junk phone messages, junk faxes, spamming, excessive cross-posting or multiple-posting, or any duplicative or unsolicited messages (commercial or otherwise).
2. use any device, software or technique to interfere with, or attempt to interfere with, the proper working of the QAD Supplier Portal, including repeated automated attempts to access password-protected portions of the QAD Supplier Portal, or to breach security or authentication measures without authorization of the owner of the system, server or network, or to use manual or electronic means to avoid any use limitations placed on the QAD Supplier Portal, or to interfere with another customer's use and enjoyment of the QAD Supplier Portal or Messaging Services.
3. post or transmit to the QAD Supplier Portal any information which is harassing, libelous, defamatory, obscene, pornographic, indecent, lewd, threatening, harmful, or otherwise objectionable.
4. post or transmit to the QAD Supplier Portal any information that contains a virus, bug, Trojan horse, worms, time bombs, cancel bots, or other harmful item.
5. publish, perform, distribute, prepare derivative works, copy, decompile, or reverse engineer any software or content provided to you, or use the content other than as expressly permitted in this Agreement.
6. post or transmit to the QAD Supplier Portal any information in violation of another party's copyright or intellectual property rights.
7. take any action which, in the sole discretion of QAD, imposes an unreasonable or disproportionately large load on the QAD infrastructure or interferes with the use of the QAD Supplier Portal.
8. redeliver any of the content using "framing", hyperlinks, or other technology without the express written permission of QAD.
9. harvest or collect information about others, including e-mail addresses, without their consent.
10. use the QAD Supplier Portal or Messaging Service for telephone solicitation of funds utilizing computer automated voice.
11. use the QAD Supplier Portal or Messaging Service in any other activity that QAD believes could subject QAD or QAD subcontractors to criminal liability or civil penalty or judgment.

In addition:

You agree to periodically allow QAD to verify your usage of the QAD Supplier Portal. If you utilize the QAD Supplier Portal in any manner which would cause a change in the Subscription Fee (such as, but not limited to, changing the number of inventory items for which you registered, or adding additional sites), QAD may change the Subscription Fee accordingly, with effect from the time the change first took place. If you change your usage of the QAD Supplier Portal and such change would alter the Subscription Fee, you agree to notify QAD within ten (10) days of such change. You agree to allow QAD reasonable access to your computer systems to verify your usage of the QAD Supplier Portal provided QAD affords you reasonable notice and such access does not disrupt your normal business operations.

ATTACHMENT B

TERMS OF USE FOR GLOBAL PRODUCT DATA SYNCHRONIZATION HOSTED SERVICE

You may also subscribe to certain UCCnet, ECCnet or EANnet services available for use with the QAD Supplier Portal for an additional fee. This Attachment B shall only apply to you in the event you subscribe to such services.

- (1) Services. Hosted solution ("Services") will consist of the following phases:
- A. Assessment Phase. Phone call where preparation checklist is reviewed with you to assess situation, preparedness, issues, retailer, and other key decisions. This will allow you to collect necessary information and resolve key policy issues before remote data entry can be completed. Assessment Phase will be deemed to have started when QAD sends preparation material to you.
 - B. Automated Remote Data Entry. Using the information and rules reviewed in the Assessment phase, you will collect your item data, and key it into the QAD Supplier Portal. You are solely responsible for all data accuracy. This data will be uploaded into the UCCnet system or other appropriate system(s).
 - C. Retailer Authorization. Items will be published to the retailer organization(s)

designated by you, and assistance will be available in resolving any issues raised by the retailer during the authorization process. QAD will work with you to ensure timely feedback by the retailer. The goal is to receive authorization within two (2) weeks of item publication.

D. Follow-on Support. Telephone support will be provided to you as required during the term of the Services.

E. On-going Data Maintenance. Hosted data maintenance for your products will be available during the data maintenance period. This maintenance will cover new product introductions and/or changes/deletions in item attributes, for the retailers that are covered by the initial data load. In the event you exceed the original number of products initially subscribed to, QAD will invoice for the additional products. A "Product Cycle" will be defined as an update to UCCnet registry information for product adds, changes, and/or deletions.

(2) Fees. Any fees such as those related to membership with UCC and UCCnet, and, if applicable, the UCCnet TESTregistry, or other standards bodies, registries or exchanges are not covered within this agreement, and will be at your direct cost.

(3) Additional Terms.

A. Cancellation: Once the Assessment Phase is initiated all fees are due in full.

B. You need to complete the following tasks before an engagement can be completed. You have up to 60 days to complete them and is your sole responsibility for their completion.

* Completed UCCnet membership: which includes being in possession of ID's & passwords for production environment, and a valid global location number for your organization. All of these items are available from UCCnet. You will be provided a TPSA code of ATR2C001 for registration

* If applicable: completed ECCnet membership: which includes being in possession of ID's & passwords for ECCnet environment, and copy of ECCnet excel worksheet; all of these items are available from ECCnet.

* Collect data and enter it into item form supplied. The quality and completeness of this information will determine the value received during the data entry process. Incomplete or erroneous data may generate fees to you from UCCnet or otherwise prevent successful completion.

C. Additional work outside the scope of Services will be provided at standard rates.

D. All materials provided by QAD are confidential and for internal use only. They may not be shared with third parties.

E. Data Entry Restrictions: unless otherwise agreed in writing by the parties, the entry of your data into the UCCnet system will not include the following: (1) Pricing, (2) Item Groups, (3) Market Groups.

Product Information Resources

QAD offers a number of online resources to help you get more information about using QAD products.

[QAD Forums \(community.qad.com\)](https://community.qad.com)

Ask questions and share information with other members of the user community, including QAD experts.

[QAD Knowledgebase \(knowledgebase.qad.com\)*](https://knowledgebase.qad.com)

Search for answers, tips, or solutions related to any QAD product or topic.

[QAD Document Library \(documentlibrary.qad.com\)](https://documentlibrary.qad.com)

Get browser-based access to user guides, release notes, training guides, and so on; use powerful search features to find the document you want, then read online, or download and print PDF.

[QAD Learning Center \(learning.qad.com\)*](https://learning.qad.com)

Visit QAD's one-stop destination for all courses and training materials.

*Log-in required

