



QAD Enterprise Applications
Standard Edition

Training Guide Customer Sequence Schedules

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About This Course

Course Description

QAD designed this course to cover the basics of preparing to implement the Customer Sequence Schedules (QCS) module of QAD Enterprise Applications Standard Edition (SE). The course includes:

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

Course Objectives

By the end of this class, students will:

- Analyze some key business decisions before setting up the QCS module
- Set up and operate the QCS module

Audience

- Implementation consultants
- Members of implementation teams
- Key users

Prerequisites

- Initial QAD SE Setup training course
- Customer Schedules training course
- Basic knowledge of how QAD SE is used in the business
- Working knowledge of the manufacturing industry in general

Note It is recommended that students unfamiliar with QAD SE work through the User Interface Guide before attending this class.

Course Credit and Scheduling

This course is designed to be taught in a day

QAD Web Resources

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

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

Chapter 1

Introduction to QCS



Introduction to Customer Sequence Schedules

- ▲ Course Overview
- ▲ What are Customer Sequence Schedules
- ▲ What Does It Do
- ▲ Where is QCS in the System
- ▲ QCS Work Flow
- ▲ QCS Example
- ▲ Terminology
- ▲ QCS Life Cycle
- ▲ Processing QCS
- ▲ Customer Sequence Schedules Menu
 - PRO/PLUS Sequence Schedules Menu
- ▲ Related Sources
- ▲ Summary

What Sequence Schedules Do

- ▲ QCS allows you to ship products in a particular, customer specified, sequence by letting you add sequence delivery information to a customer schedule order. Using QCS you can:
 - Set up default sequence schedule details
 - Manage short term requirements that include the sequence in which those requirements will be consumed
 - Use the sequence schedule data to plan your production and shipping of the customer's requirements
 - Receive incoming customer sequence schedules using EDI eCommerce
 - Selectively include sequence requirement information

Customer Sequence Schedules



Sequence Schedule Documents and Variances

- ▲ View variances between shipping or planning schedules and sequence schedules or between different releases of a sequence schedule
 - Generate sequence packing lists automatically when creating pre-shippers and shippers
 - Print sequence packing lists in forward or reverse order
 - Maintain detailed picking records for all sequenced requirements
 - Maintain multiple sequence schedule releases

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CSS-IN-032

The Customer Sequence Schedules (QCS) functionality enhances the current Customer Schedules module.

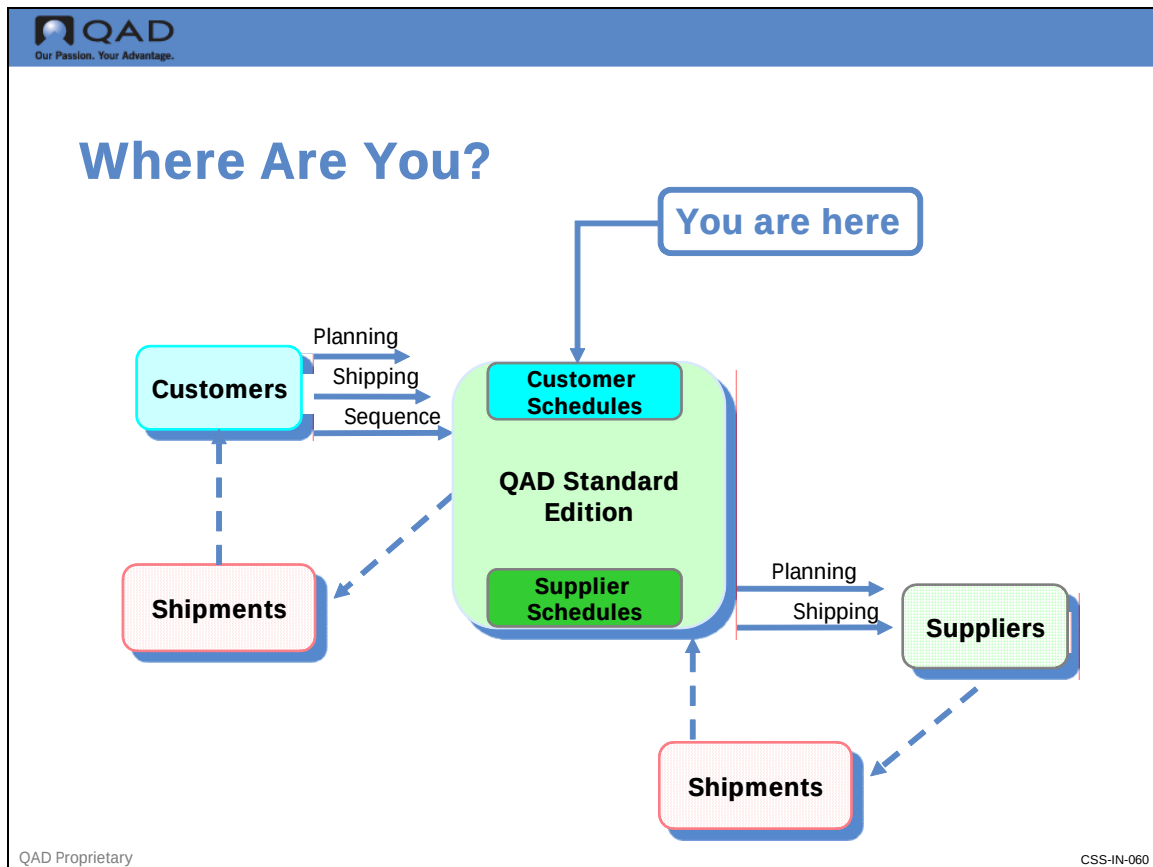
- Allows you to receive and process shorter term, detailed customer sequence schedules
- Sent by an Electronic Data Interchange (EDI) or EDI eCommerce
 - Document type 866

What Customer Sequence Schedules Do

QCS allows you to ship products in a particular, customer specified, sequence by letting you add sequence delivery information to a customer schedule order. Using QCS you can:

- Set up default sequence schedule details
 - Customize the default sequence schedule information for individual customer/ship-to
 - Dates, times, items, quantities
 - Destination information
 - Desired packing order
- Manage short term requirements that include the sequence in which those requirements will be consumed
- Use the sequence schedule data to plan your production and shipping of the customer's requirements

Where Are You?



Receive incoming customer sequence schedules using EDI eCommerce.

Selectively include sequence requirement information on:

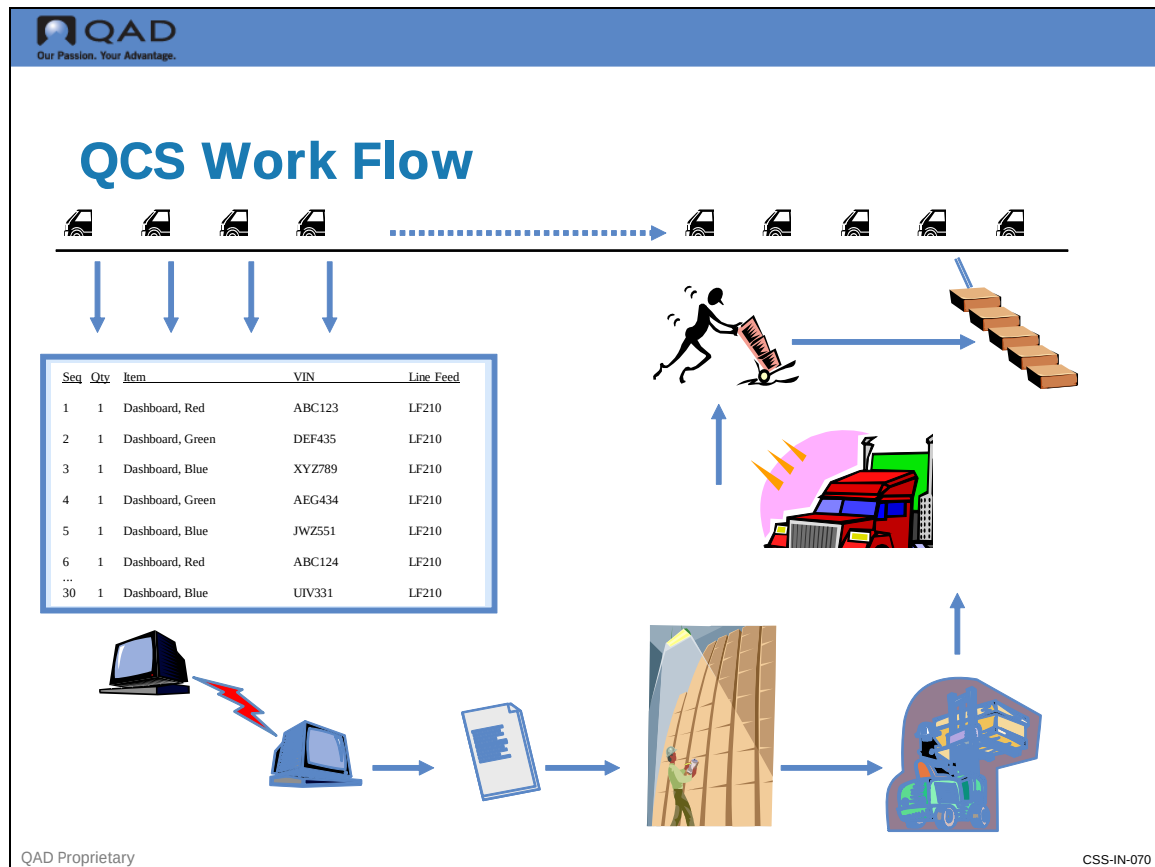
- Picklist/Pre-Shipper
- Shipper
- Invoice
- Advanced Ship Notice (ASN)
- Required Ship Schedule (RSS)

View variances between shipping or planning schedules and sequence schedules or between different releases of a sequence schedule.

- Generate sequence packing lists automatically when creating pre-shippers and shippers
- Print sequence packing lists in forward or reverse order
- Maintain detailed picking records for all sequenced requirements
- Maintain multiple sequence schedule releases

Customer sequence schedules is part of the customer schedules functionality found in QAD Release Management.

QCS Workflow



Some customers need a particular delivery sequence in order to facilitate the consumption of the parts by their own assembly process.

- Existing Customer Schedules functionality did not meet this requirement

This type of shipping is becoming increasingly popular with customers requiring larger subassemblies that are similar, but differ in color, size, or other optional features.

- Sun Roofs
- Dashboards
- Seats

Many companies that operate in just-in-time (JIT) environments regularly provide detailed customer sequence schedules to their key suppliers.

These sequence schedules:

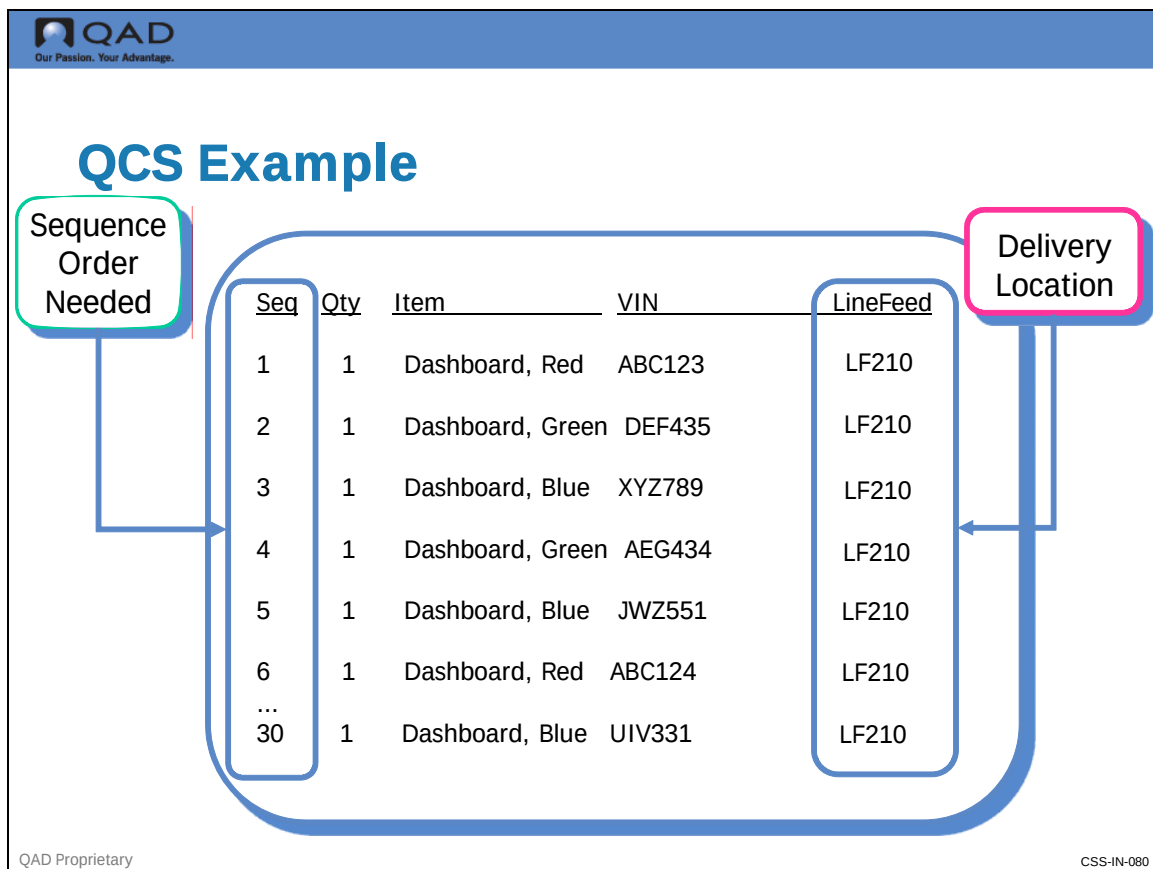
- List requirements in the order needed by the customer to build their products
- Can specify a delivery date and time
- Can specify a dock and assembly line-feed delivery location

For example, in a JIT manufacturing environment such as automotive manufacturing, the supplier would provide subassemblies that are similar, but different in color, size, or other optional features (e.g., seating, sun roofs) directly to the original equipment manufacturer (OEM). The OEM

schedules the production of the vehicles, including colors and options. These requirements, as well as the order (i.e., sequence) in which they are required, are sent to the supplier in a production sequence schedule or 866 document.

Suppliers receiving these customer sequence schedules need accurate and timely visibility into customer production line activity. They use the sequence schedule requirements to plan the manufacturing and delivery of the correct parts, in the correct sequence, to their customers. The sequence information also alerts them to any fluctuations in customer production.

QCS Example



Terminology



Our Passion. Your Advantage.

Terminology

- ▲ Customer Dock
- ▲ Customer Job
- ▲ Customer Reference
- ▲ Customer Sequence
- ▲ Line Feed
- ▲ Packing Order
- ▲ Sequence Pack List

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Customer Dock

Identifies dock location within the customer's site for material to be delivered

Customer Job

Customer supplied ID

- Identifies customer's production process
- Can contain alphanumeric values
 - For example, date – 02/07/2009

Customer Reference

Identifies the customer's end item

- VIN (automotive)
- Serial Number
- Used as an ID to track sequences
- Must be unique

Customer Sequence

Customer supplied ID

- Identifies order of assemblies in their production process
- Can contain alphanumeric values
 - For example, A001, A002, B001

Line Feed

Identifies location within customer's site for material to be delivered.

Packing Order

Indicates how the material is to be packed according to the customer's preference.

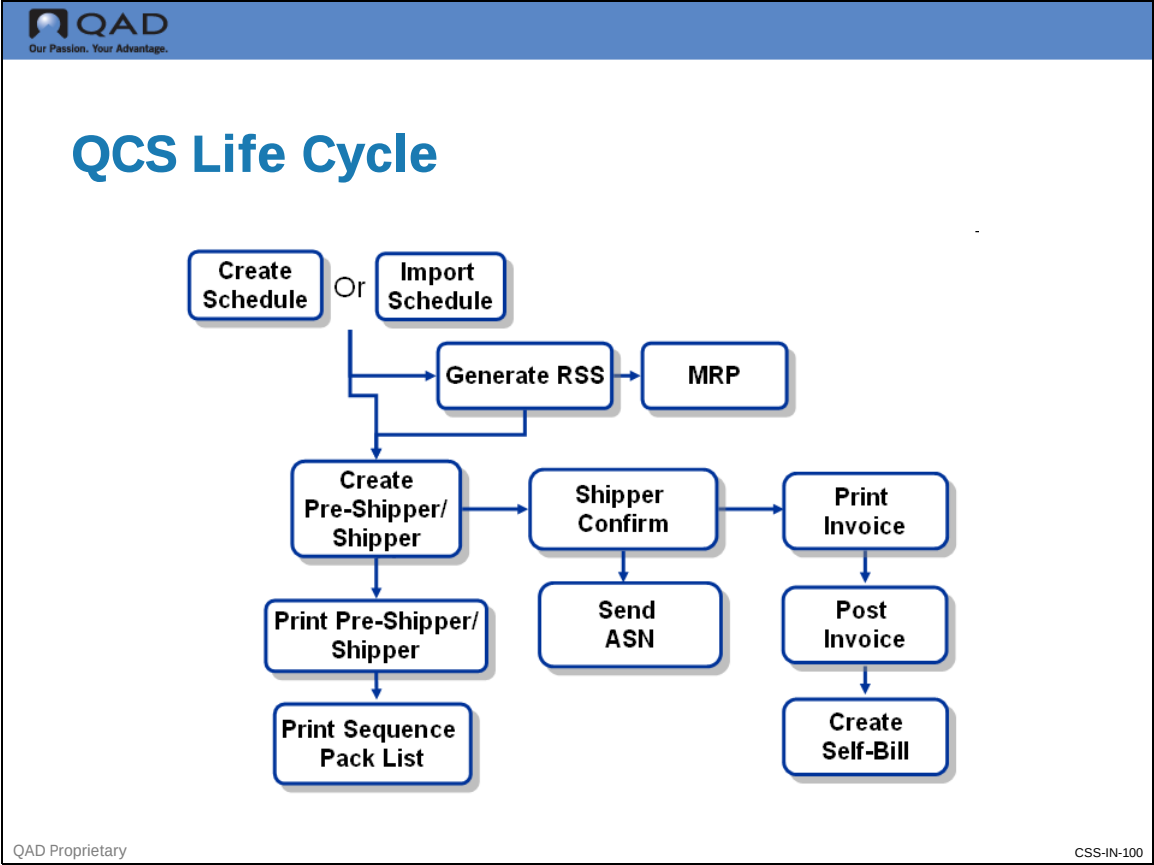
- Two types:
 - Forward
 - Reverse (i.e., first on top)

Sequence Pack List

New document that accompanies pre-shipper (total quantity)

- Displays items in sequence
- Facilitates material handling
 - Staging
 - Shipping

QCS Life Cycle



Processing QCS



The typical procedure for processing a customer's sequence scheduled order is:

- 1 Create a sequence scheduled order for a customer.
- 2 Import the sequence schedule release from the customer.
 - Long term planning schedule outlining the customer's requirements (e.g., dates, quantities)
 - Short term shipping schedule outlining what to ship day-to-day (optional)
- 3 Create the RSS to determine the required quantities for the customer's sequenced scheduled order.
- 4 Using information from the RSS, determine the planning requirements for the sequence scheduled order.
- 5 Pick items being shipped.
- 6 Ship the ordered items.

Schedule Processing Menu (7.5)



Our Passion. Your Advantage.

Schedule Processing Menu

Applications

7.5

7.5.1 Customer Plan Schedule Maint

7.5.2 Customer Ship Schedule Maint

7.5.3 Required Ship Schedule Maint

7.5.4.1 Customer Controls Maintenance

7.5.4.2 Customer Controls Inquiry

7.5.4.5 Sequence Schedule Maintenance

7.5.4.6 Sequence Schedule Inquiry

7.5.4.7 Sequence Schedule Report

7.5.4.10 Sequence Pre-Shipper - Automatic

7.5.4.11 Sequence Shipper Report

7.5.4.13 Sequence Cross-Ref Maintenance

7.5.4.14 Sequence Cross-Ref Report

7.5.4.16 Sequence Schedule Variance Rpt

7.5.4.17 Plan/Ship Sequence Variance Rpt

7.5.4.22 Sequence Schedule Detail Delete

Applications

7.5

7.5.4.24 Sequence Schedule Control

7.5.5 Required Ship Schedule Update

7.5.6 Selective Req Ship Sched Update

7.5.8 Schedule Inquiry

7.5.9 Schedule History Inquiry

7.5.10 Schedule Report

7.5.11 Schedule Comparative

7.5.12 Schedule Authorization Report

7.5.13 Req Ship Schedule Summary Report

7.5.14 Req Ship Schedule Detail Report

7.5.16 Cumulative Shipped Maintenance

7.5.18 Cum Shipped Reset

7.5.20 Shipment History Report

7.5.21 Ship Schedule Variance Report

7.5.22 Ship to Plan Variance Report

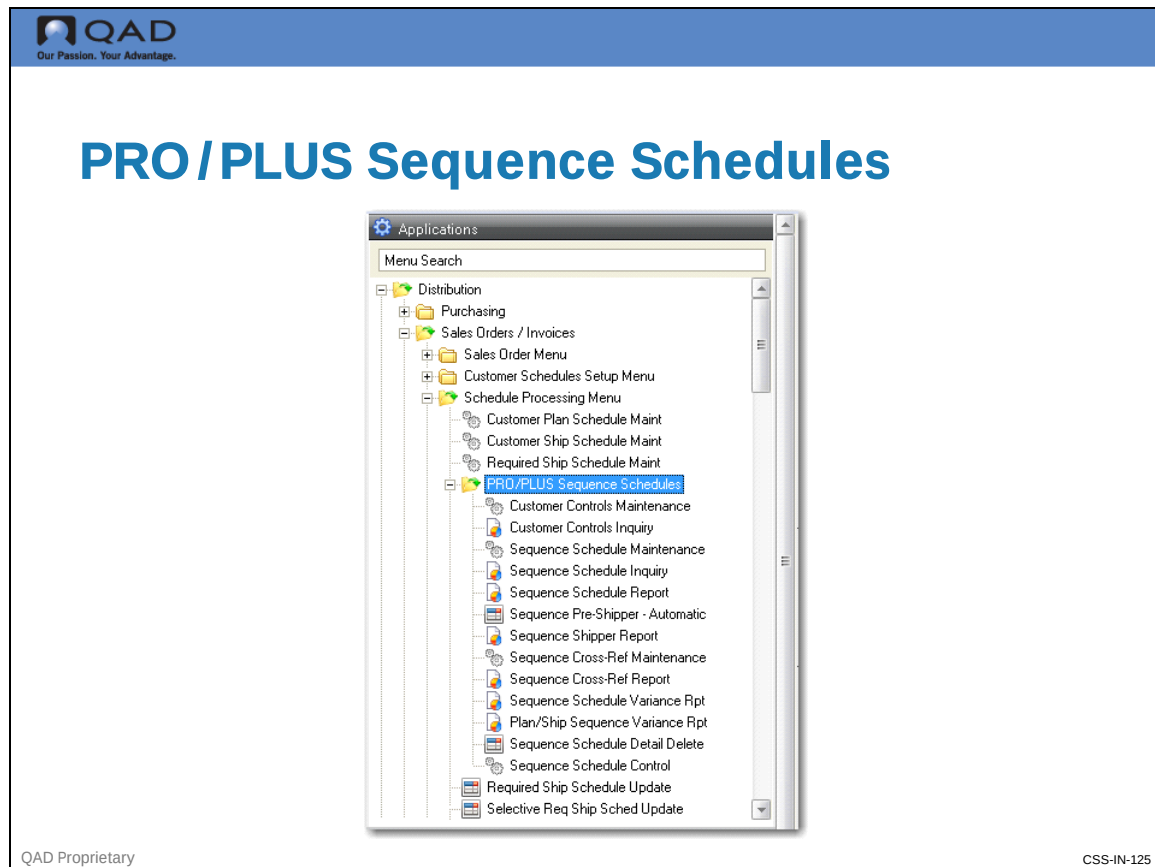
7.5.23 Schedule Delete/Archive

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Access to the QCS functions.

PRO/PLUS Sequence Schedules



Use the PRO/PLUS Sequence Schedules menu to access the QCS functions.

Review Questions:

- 1 What kinds of shipments demand Sequence Schedules? (Large subassemblies with optional features)
- 2 What are the advantages of QCS over standard Customer Schedules? (shorter lead times, greater detail)
- 3 What technology is required to transmit Sequence Schedules? (EDI)
- 4 What document type is transmitted? (866)
- 5 Can picklists include Sequence Schedules? (Y)

Chapter 2

Business Considerations



Business Considerations

In this section you learn how to:

- ▲ Identify key business considerations before setting up QCS in QAD Standard Edition
- ▲ Set up QCS in QAD Standard Edition
- ▲ Loading QCS in QAD Standard Edition
- ▲ Planning QCS in QAD Standard Edition
- ▲ Shipping QCS in QAD Standard Edition
- ▲ QCS Features and Options



Business Considerations

- ▲ EDI/EDI eCommerce
- ▲ Netting Logic

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There are several business considerations to look at before setting up QCS in QAD SE. This section does not discuss all potential considerations, but presents some to generate thought and discussion.

EDI eCommerce



EDI eCommerce

▲ Definition of EDI

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

▲ Definition of EDI eCommerce

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

EDI Business Value and Features



EDI Business Value and Features

- ▲ Time saving
 - Information processed faster
 - Shortened response times
- ▲ Reduced data input
 - Reduces errors
- ▲ Saves labor costs
 - Reduces/eliminates paperwork, fewer people are needed
- ▲ Lower inventory levels
- ▲ Functionality in QAD Standard Edition
 - Support import of customer sequence schedules
 - Support export of invoices and ASNs
- ▲ Setup Implications
 - EDI/eCommerce software, files, etc., need to be setup
- ▲ Discussed in the following Training Guide: EDI/eCommerce

Netting Logic



Netting Logic

Definition

- ▲ Netting logic determines how Required Ship Schedule Update (7.5.5) calculates a new release of the RSS. It uses netting logic to interpret quantities from the planning, shipping, and sequence schedules to arrive at the correct input for MRP (Material Requirements Planning).
- ▲ Why Consider
 - Customer sends sequence, planning, and shipping schedules
 - Need to tell system how to handle the schedules when calculating the RSS
- ▲ Functionality in QAD Standard Edition
- ▲ There are four options. The system uses the one you select to determine:
 - Which schedule to use to calculate the RSS
 - How to handle overlap in planning, shipping, and sequence schedules
- ▲ Netting logic works differently when sequences are associated with a scheduled order line item.

Scheduled and Sequence Scheduled Order Precedence



Scheduled and Sequence Scheduled Order Precedence

- ▲ For scheduled orders without sequence schedules:
 - Option 1 – uses only the shipping schedule
 - Option 2 – uses only the planning schedule
 - Option 3 – combines planning and shipping schedule, with the shipping schedule taking precedence in the interval the schedules overlap
 - Option 4 – combines the planning and shipping schedules, with the greater of the shipping or planning schedule taking precedence in the interval of the schedule overlaps
- ▲ For scheduled orders with sequence schedules:
 - Option 1 – uses sequence and shipping schedule
 - Option 2 – uses sequence and planning schedule
 - Option 3 – combines sequence, planning, and shipping schedule, with the sequence schedule taking precedence over the shipping schedule, then the shipping schedule taking precedence in the interval the shipping and planning schedules overlap

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CSS-BU-024

For scheduled orders without sequence schedules:

- Option 1 – uses only the shipping schedule
 - Short-term planning
- Option 2 – uses only the planning schedule
 - Long-term planning
- Option 3 – combines planning and shipping schedule, with the shipping schedule taking precedence in the interval the schedules overlap
 - Replace logic
- Option 4 – combines the planning and shipping schedules, with the greater of the shipping or planning schedule taking precedence in the interval of the schedule overlaps
 - Consume logic

Note Discussed in the following Training Guide: Customer Schedules.

Sequence Scheduled Orders

For scheduled orders with sequence schedules:

- Option 1 – uses sequence and shipping schedule
 - Short-term planning

- Option 2 – uses sequence and planning schedule
 - Long-term planning
- Option 3 – combines sequence, planning, and shipping schedule, with the sequence schedule taking precedence over the shipping schedule, then the shipping schedule taking precedence in the interval the shipping and planning schedules overlap
 - Replace logic
- Option 4 – combines sequence, planning, and shipping schedules, with the greater of the shipping or planning schedule taking precedence in the interval of the schedule overlaps
 - Consume logic

Setup Implications

- Scheduled Order Maintenance (7.3.13) needs to reflect the netting logic used for this customer's sequence scheduled order
 - Each sequence scheduled order can have a different netting logic

Note See in this training guide: Create Sequence Schedule Order (under Set Up Customer Sequence Schedules).

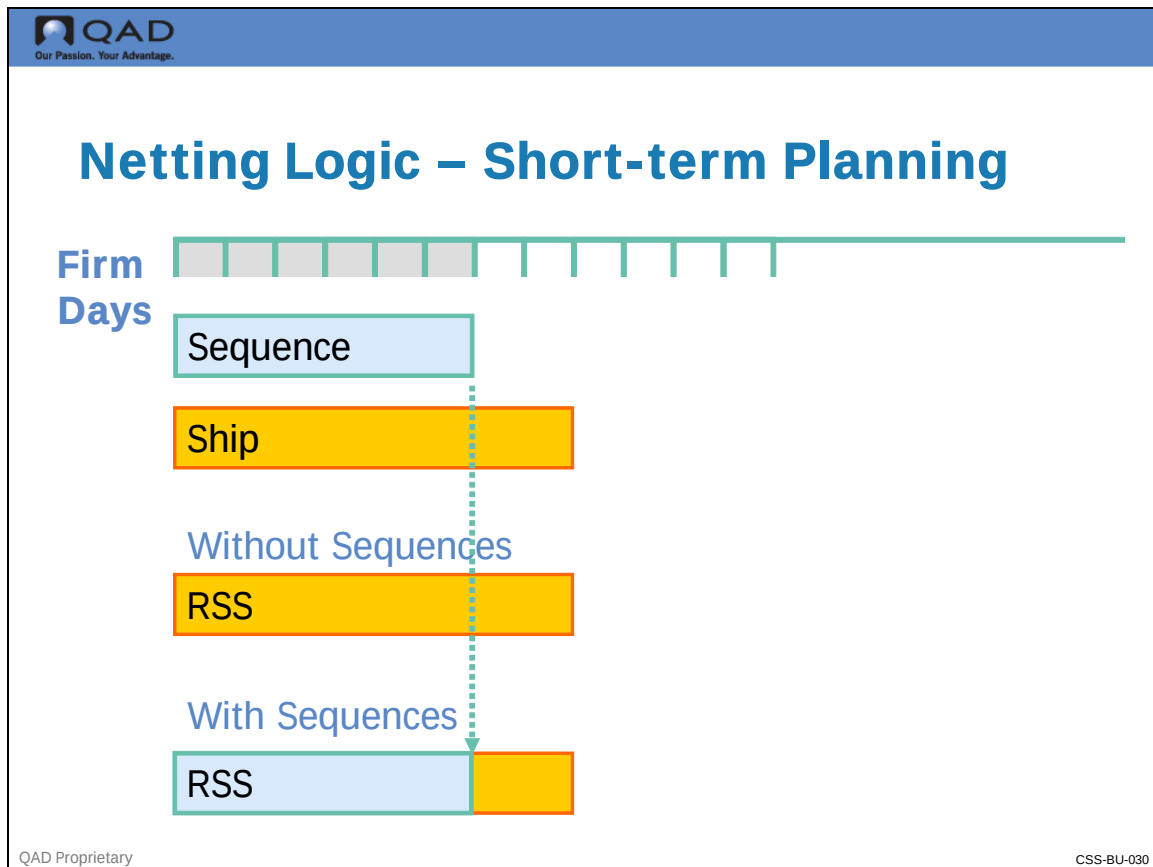
Sequenced Scheduled Orders



Sequenced Scheduled Orders

Short Term Netting	Sequence Schedules	Shipping Schedules	Planning Schedules
Scheduled Orders		1	
Sequences	1	2	
Long Term Netting			
Scheduled Orders			1
Sequences	1		2
Replace Logic			
Scheduled Orders		1	2
Sequences	1	2	3
Consume Logic			
Scheduled Orders		2	1
Sequences	1	3	2

Short Term Planning



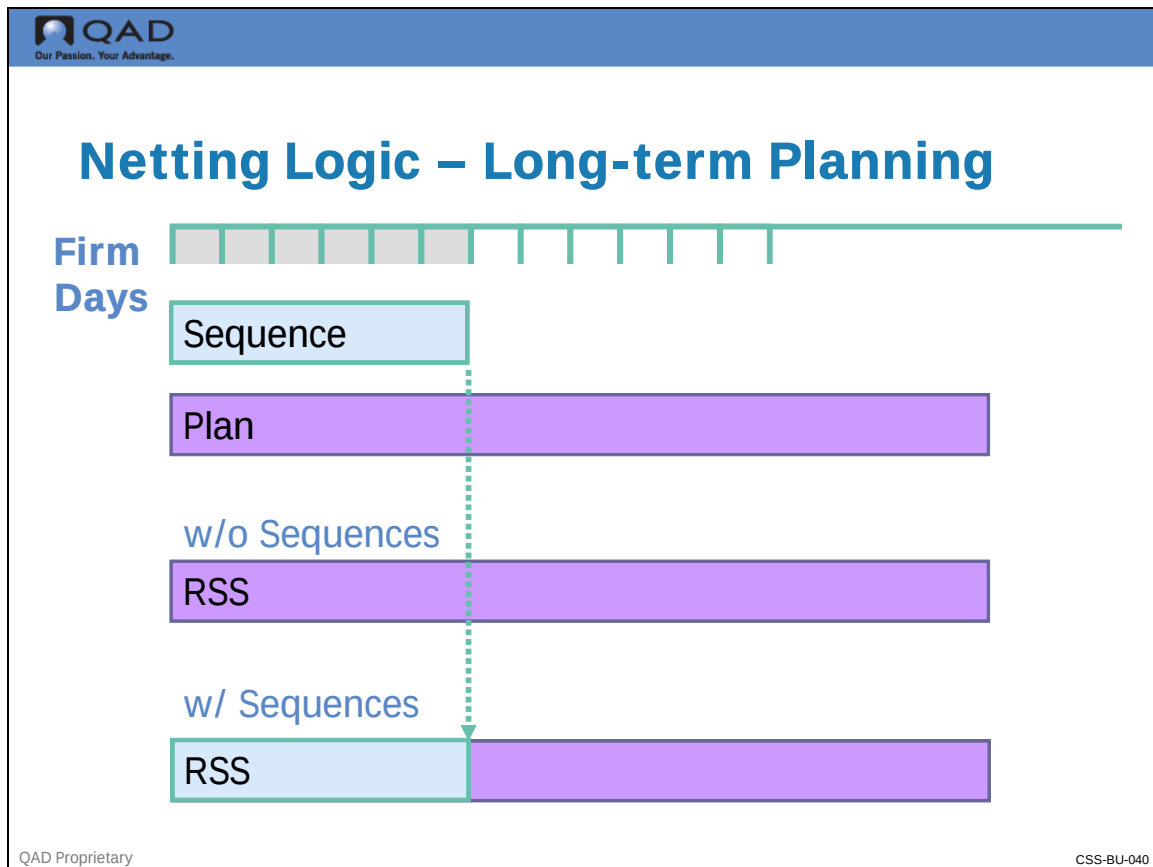
System uses the sequence and the shipping schedule to calculate the RSS.

- To determine the number of sequence schedule days, the system uses the number of Firm Days specified in the sequence scheduled order
 - Specified in Scheduled Order Maintenance, Sequence Delivery Data frame
- Shipping schedule is appended to the end of the sequence schedule days
 - In other words, the beginning of the shipping schedule is replaced by the number of days specified by the Firm Days in the sequenced scheduled order

Using the above graphic as an example, the Firm Days are six.

- When calculating the RSS with sequences, the calculation starts with the sequence schedule for the first six days
- After six days, the calculation goes to the shipping schedule

Long-term Planning



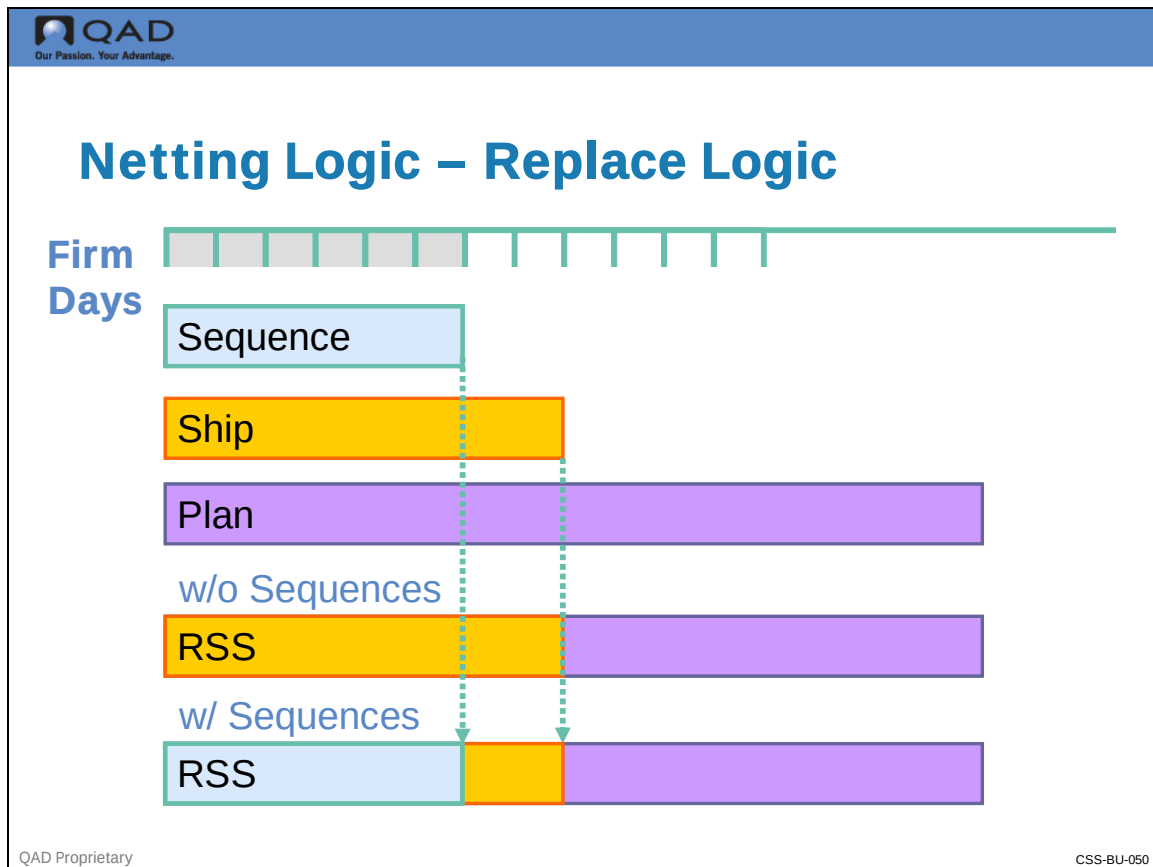
The system uses the sequence and planning schedule to calculate the RSS.

- To determine the number of sequence schedule days, the system uses the number of Firm Days specified in the sequence scheduled order
 - Specified in Scheduled Order Maintenance, Sequence Delivery Data frame
- Planning schedule is appended to the end of the sequence schedule days
 - In other words, the beginning of the planning schedule is replaced by the number of days specified by the Firm Days in the sequenced scheduled order

Using the above graphic as an example, the Firm Days are six.

- When calculating the RSS with sequences, the calculation starts with the sequence schedule for the first six days
- After six days, the calculation uses the planning schedule

Replace Logic



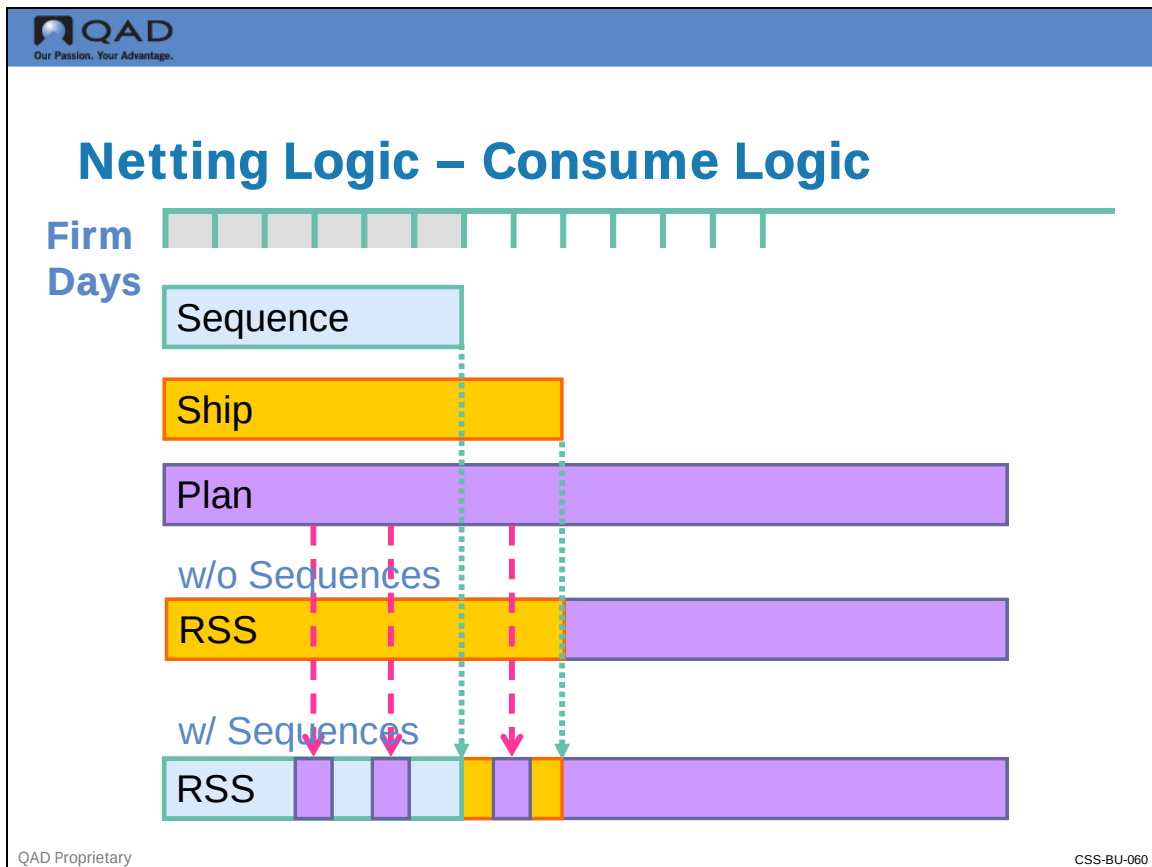
System combines the sequence, planning, and shipping schedules. Calculation starts with the specified sequence schedule days, followed by the shipping schedule, then the planning schedule.

- Sequence schedule days takes precedence over the shipping and planning schedule
- Shipping schedule takes precedence over the planning schedule

Using the above graphic as an example, the Firm Days are six.

- When calculating the RSS with sequences, the calculation starts with the sequence schedule for the first six days
- After six days, the calculation goes to the shipping schedule
- If the planning schedule extends beyond the shipping schedule, that is used after the shipping schedule

Consume Logic



The system uses the sequence, shipping, and planning schedules to calculate the RSS.

- The sequence schedule is processed first
- The shipping schedule is processed after the sequence schedule
- The planning schedule is processed last

The schedule consumes the shipping schedule. The shipping schedule consumes the planning schedule. Any discrepancy is reconciled in the last daily bucket.

Review Questions

- 1 In what instances would you choose Replace Logic?
- 2 What events occur if a customer sends you a revised sequence schedule one day prior to shipment? One hour?
- 3 How does MRP impact schedules?

Chapter 3

Customer Sequence Schedules Setup



Our Passion. Your Advantage.

QCS Setup



- ▲ Item Records *
- ▲ Customer Records *
- ▲ Customer Calendars
- ▲ QCS Control Files
- ▲ Status Codes
- ▲ EDI/eCommerce *
- ▲ Sequence Scheduled Order

* Optional

QAD

CSS-SU-020

QCS Setup



Setting Up QCS Involves the Following

- ▲ Review and update item records.
- ▲ Review and update customer records.
- ▲ Set up customer calendars.
- ▲ Set up QCS Control Files.
 - Enable QCS.
 - Define system wide control file parameters.
 - If desired, define customer control file parameters.
- ▲ Define parameters for EDI/eCommerce.
- ▲ Create sequence scheduled order.

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CSS-SU-030

This illustration is a suggested setup sequence of master files for the QCS module which is based on information that flows from one master file to another and prerequisites that need to be accomplished before setting up a file.

Item Records



QCS Setup



- ▲ Item Records *
- ▲ Customer Records *
- ▲ Customer Calendars
- ▲ QCS Control Files
- ▲ Status Codes
- ▲ EDI/eCommerce *
- ▲ Sequence Scheduled Order

* Optional

QADCSS-SU-040

Before creating a sequence scheduled order, item records must exist for all items and products stored in inventory that you will be shipping. The Item Masterfile contains records for all items, regardless of site. Item records hold the default information about items.

- If you are using shipping containers, you must set up container item numbers

To add item records, use one of the following:

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

First Activity for all SE Courseware

Training

The screenshot shows the QAD software interface. The 'Workspace' menu is open, and 'United States (1)' is selected under the 'Training' category. The main window displays a table of sequence schedules for the year 2009.

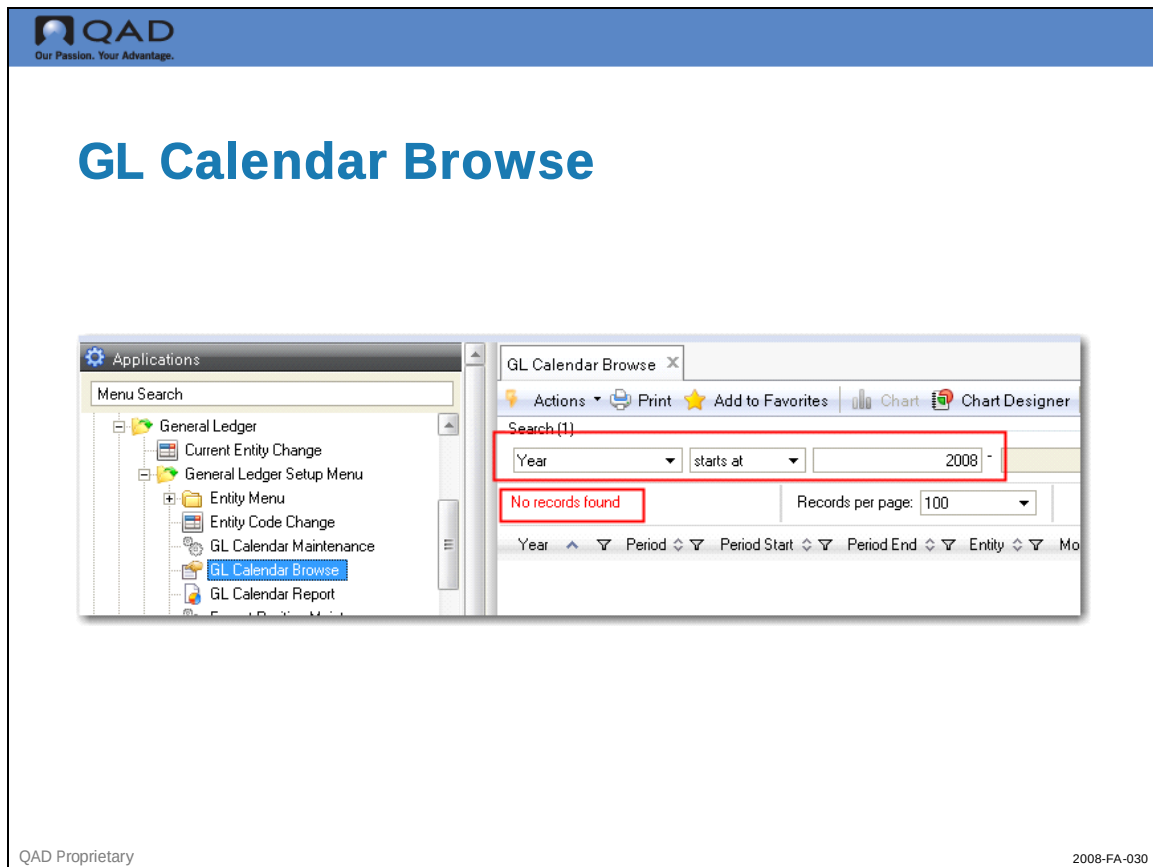
Year	Period	Period Start	Period End	Entity	Modules Closed	G/L Closed
2009	1	01/01/2009	01/31/2009	100	No	No
2009	1	01/01/2009	01/31/2009	2000	No	No
2009	1	01/01/2009	01/31/2009	3000	No	No
2009	2	02/01/2009	02/28/2009	100	No	No
2009	2	02/01/2009	02/28/2009	1000	No	No
2009	2	02/01/2009	02/28/2009	2000	No	No
2009	2	02/01/2009	02/28/2009	3000	No	No
2009	3	03/01/2009	03/31/2009	100	No	No
2009	3	03/01/2009	03/31/2009	1000	No	No
2009	3	03/01/2009	03/31/2009	2000	No	No
2009	3	03/01/2009	03/31/2009	3000	No	No
2009	4	04/01/2009	04/30/2009	100	No	No
2009	4	04/01/2009	04/30/2009	1000	No	No
2009	4	04/01/2009	04/30/2009	2000	No	No

QAD Proprietary 2008-FA-020

1 Verify Domain: From the workspace menu select United States (1).

Note the domain name appears in the top window frame.

GL Calendar Browse



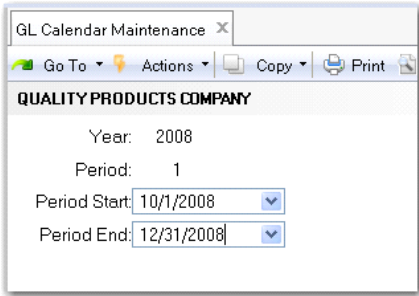
2 Verify GL Calendar Period

- a Use GL Calendar Browse (25.3.5)
- b Start search at current year
- c You should see a list of months for the current year
- d If you find No Records continue to step three.

GL Calendar Maintenance

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GL Calendar Maintenance



GL Calendar Maintenance

Go To Actions Copy Print

QUALITY PRODUCTS COMPANY

Year: 2008

Period: 1

Period Start: 10/1/2008

Period End: 12/31/2008

QAD Proprietary 2008-FA-040

3 Use GL Calendar Maintenance (25.3.4)

- a Enter the current year, then as a short cut enter one period whose dates will cover the term of your training event.

QCS Exercises

You have just been awarded a huge contract with a new customer, Fjord Motor Company. You are the sole supplier to two Fjord plants, supplying five styles of sunroof from your finished goods inventory. Fjord is a JIT automotive assembler who does not want to have a huge investment of your in inventory so they require you to deliver sunroofs at the time they are needed and in the order of their assembly line process. Fjord will be sending you daily schedule from each plant containing the requirements for the next three days in the order of consumption. You are going to use Customer Sequence Schedules to support your Fjord account.

Note Be sure you have the necessary files set up on your database before continuing with the exercises.

See in this training guide: Loading Test Data. Use the instructions in Appendix A or B and C.

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

Exercise: Add Item Record

Create first item record for the new Fjord customer.

Use Item Master Maintenance (1.4.1).

- 1 Create an item record for the sunroof by entering the following:

Field	Data
Item Number:	part1
UM:	EA
Description:	sunroof, red

- 2 Advance to the Item Data frame and enter:

Field	Data
Prod Line:	1500
Promo Group:	pg1
Status:	ac

- 3 Advance to the Item Inventory Data frame and enter:

Field	Data
Site:	10000
Location:	100

- 4 Advance to the Item Shipping Data frame and enter:

Field	Data
Ship Weight:	5 LB
Net Weight:	3 LB

- 5 Advance to the Item Planning Data frame and enter:

Field	Data
Pur/Mfg:	M
Mfg:	LT 1

- 6 Advance to the Item Price Data frame and enter:

Field	Data
Price:	100.00

Exercise: Create Remaining Item Numbers

Since you have already created one item number, you can now use that as the basis for the remaining four sunroofs. This is done by copying the data from the first item record (part).

Use Item Master Copy (1.4.12).

- 1 To create the second item record using the data from the first enter:

Field	Data
Copy Item Number:	part1
To:	part2
Description:	sunroof, green

- 2 Create the third item record by entering:

Field	Data
Copy Item Number:	part1
To:	part3
Description:	sunroof, blue

- 3 Create the fourth item record by entering:

Field	Data
Copy Item Number:	part1
To:	part4
Description:	sunroof, black

- 4 Create the fifth item record by entering:

Field	Data
Copy Item Number:	part1
To:	part5
Description:	sunroof, clear

Customer Item Maintenance (1.16)

Customer Item Maintenance

Customer/Ship-To:

Customer Item:

Item Number:

Comment:

Display Customer Item:

Customer Item ECO Nbr:

Must exist in Item Master File

Prints on Shipper & ASNs

Back Next

Customer Item Maintenance (1.16)

QAD Proprietary CSS-SU-060

Use Customer Item Maintenance (1.16) to set up cross-references between:

- Your internal item numbers and your customer's item numbers
 - You can choose to have one or both item numbers appear on all sales and shipping paperwork

On sales quotes and sales orders the item number can only be 18 characters long.

- Internal numbering systems, industry standard (UPC), or marketing catalog numbers
 - By leaving the Customer field blank, the cross-reference will apply to all customers

Exercise: Create Customer Items for Each Part

Fjord uses their own customer item numbers for each part and wants to have that item number referenced on the sequence scheduled order.

Use Customer Item Maintenance (1.16).

- 1 To create a customer item for the first part, enter:

Field	Data
Customer /Ship-to:	<blank>
Customer Item:	sunroof, red
Item Number	part1

- 2 Create a customer item for the second part by entering:

Field	Data
Customer /Ship-to:	<blank>
Customer Item:	sunroof, green
Item Number	part2

- 3 Create a customer item for the third part by entering:

Field	Data
Customer /Ship-to:	<blank>
Customer Item:	sunroof, blue
Item Number	part3

- 4 Create a customer item for the fourth part by entering:

Field	Data
Customer /Ship-to:	<blank>
Customer Item:	sunroof, black
Item Number	part4

- 5 Create a customer item for the fifth part by entering:

Field	Data
Customer /Ship-to:	<blank>
Customer Item:	sunroof, clear
Item Number	part5

Exercise: Add Inventory

Each part needs to be added to inventory.

Use Receipts - Unplanned (3.9).

- 1 To add inventory for the first part, enter:

Field	Data
Item Number:	part1
Quantity:	1000

Field	Data
Site:	10000
Location:	100

- 2 Add inventory for the second part by entering:

Field	Data
Item Number:	part2
Quantity:	1000
Site:	10000
Location:	100

- 3 Add inventory for the third part by entering:

Field	Data
Item Number:	part3
Quantity:	1000
Site:	10000
Location:	100

- 4 Add inventory for the fourth part by entering:

Field	Data
Item Number:	part4
Quantity:	1000
Site:	10000
Location:	100

- 5 Add inventory for the fifth part by entering:

Field	Data
Item Number:	part5
Quantity:	1000
Site:	10000
Location:	100

Customer Records



QCS Setup



- ▲ Item Records *
- ▲ Customer Records *
- ▲ Customer Calendars
- ▲ QCS Control Files
- ▲ Status Codes
- ▲ EDI/eCommerce *
- ▲ Sequence Scheduled Order

* Optional

QADCSS-SU-080

A customer record must exist for each of your customers. The system uses this information to identify the customer and to determine how to process the customer's order.

Customer Maintenance (2.1.1)

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Customer Maintenance

Customer Maintenance X
Go To Actions Copy Print Preview Attach

Attachments

Customer Address

Customer: 1004000

Name: WORLDWIDE BUSINESS SUPPLY

Address:

Address: 8000 CENTRAL AVENUE

Address:

City: ANAHEIM State: CA Post: 90002 Format: 0

Country: United States of America USA Country:

Attention: MR. ALEX TUMMERS [2] MS. WENDY SMITH

Telephone: 714-555-0239 Ext: [2]

Fax/Telex: 714-555-0023 [2] Added: 5/3/1988

Customer Data

Sort Name: WORLDWIDE BUSINESS SUPPLY Type: 1000

Salespsn1: Multiple: Region: US

Ship Via: GROUND TRUCK Currency: USD

AR Acct: 1200 Dual Pricing Cur:

Resale: 88-02-09 T92X Site: train

Remarks: Lang: us

Delete Back Next

QAD Proprietary Customer Maintenance (2.1.1) CSS-SU-090

Use Customer Maintenance (2.1.1) to set up and maintain customer records. Customer records contain information about the customer such as:

- Address
- General Data
- Credit Data
- Freight Data
- Bank Information

Exercise: Setup Customer

Since Fjord is a new customer, you need to create a customer record.

Use Customer Maintenance (2.1.1).

- 1 Create a customer record for Fjord by entering the following:

Field	Data
Customer:	Fjord
Name	Fjord Motor Company
<Country Code>	USA

- 2 Advance to the Customer Data frame and enter:

Field	Data
Site:	10000
Lang:	US

A pop-up window will require a time zone, use GMT-8.

- 3 Advance to the Customer Credit Data frame and enter:

Field	Data
Credit Limit:	1,000,000,000

Customer Addresses



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Customer Maintenance

- ▲ Customer Addresses
 - ▲ Sold-To Address
 - ▲ Bill-To Address
 - ▲ Ship-To Address

QAD Proprietary

CSS-SU-110

A sequence scheduled order references three customer addresses:

- Sold-to
 - Places the order
- Bill-to
 - Pays the invoice
- Ship-to
 - Receives the order

Customer Maintenance (2.1.1)

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Customer Maintenance

Customer Maintenance X

Go To Actions Copy Print Preview Attach

Attachments

Customer Address

Customer: 1004000

Name: WORLDWIDE BUSINESS SUPPLY

Address:

Address: 8000 CENTRAL AVENUE

Address:

City: ANAHEIM State: CA Post: 90002 Format: 0

Country: United States of America USA County:

Attention: MR. ALEX TUMMERS [2]: MS. WENDY SMITH

Telephone: 714-555-0239 Ext: [2]:

Fax/Telex: 714-555-0023 [2]: Added: 5/3/1988

Customer Data

Sort Name: WORLDWIDE BUSINESS SUPPLY Type: 1000

Salespsn1: Multiple: Region: US

Ship Via: GROUND TRUCK Currency: USD

AR Acct: 1200 Dual Pricing Cur:

Resale: 88-02-09 T92X Site: train

Remarks: Lang: us

Delete Back Next

QAD Proprietary Customer Maintenance (2.1.1) CSS-SU-120

- Places the order
- Always entered first
- The following fields in the sequence scheduled order default from the sold-to address unless you enter a different ship-to address:
 - Site
 - Language
 - Taxable (Y/N)
 - Salesperson
 - Remarks
 - Ship Via

Sold-to/Bill-To Relationship

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Customer Maintenance

Customer Maintenance X

Go To Actions Copy Print Preview Attach

Attachments

Customer Address

Customer: 1004000
 Name: WORLDWIDE BUSINESS SUPPLY
 Address:
 Address: 8000 CENTRAL AVENUE
 Address:
 City: ANAHEIM State: CA Post: 90002 Format: 0
 Country: United States of America USA County:
 Attention: MR. ALEX TUMMERS [2]: MS. WENDY SMITH
 Telephone: 714-555-0239 Ext: [2]:
 Fax/Telex: 714-555-0023 [2]: Added: 5/3/1988

Customer Credit Data

Credit Limit: 10,000,000 Disc Pct: 0.00% Bill To:
 Terms: 2/10-30 Finance Charge: ☒ Last Credit Review:
 Credit Hold: ☒ Statement: ☒ Last Credit Update: 12/16/1994
 Credit Rating: 9 Statement Cycle: 12/1 High Credit: 4,620
 DB Number: 901020 Dun Letter: ☒ High Date: 9/30/1989
 PO Required: ☐ Last Payment: 9/30/1989 Last Sale: 9/30/1990

Back Next

Customer Maintenance (2.1.1)

QAD Proprietary CSS-SU-130

- Pays the invoices
- Set up in Customer Maintenance if different from the sold-to
- Defaults to sold-to, unless you assign a different bill-to on the sold-to record
- Determines the default credit terms and currency and the Accounts Receivable account

Ship-To Address

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Customer Ship-to Maintenance

Customer Ship-to Maintenance

Go To Actions Copy Print Preview Attach

Attachments

Customer Address

Customer: 1004000
Name: WORLDWIDE BUSINESS SUPPLY
Address:
Address: 8000 CENTRAL AVENUE
City: ANAHEIM

County:
State: CA USA
Country: United States of America
Postal Code: 90002 Format: 0

Customer Ship-To

Code: 00010000 Temporary: ☐
Name: WORLDWIDE BUSINESS SUPPLY
Address:
Address:
Address:
City: State: Postal: Format: 0
Country: County:
Attention: [2]:
Telephone: Ext: [2]:
Fax/Telex: [2]: Language: us
Sort Name: WORLDWIDE BUSINESS SUPPLY

Sold-To / Ship-To Relationship

Delete Back Next

QAD Proprietary Customer Ship-to Maintenance (2.1.13) CSS-SU-140

- Receives the order
- Defaults to sold-to, unless you assign a different ship-to
- Can set up alternate ship-to addresses in Customer Ship-to Maintenance (2.1.13)
- Can set up the ship-to in Customer Maintenance if information such as language, currency, etc., are different from the sold-to

Exercise: Create Ship-To Address

Fjord want to receive the shipments at a location different from the corporate offices. You need to set up ship-to addresses.

Use Customer Ship-to Maintenance (2.1.13).

- 1 Create Ship-To Addresses for each Fjord plant.

Field	Data
Customer:	Fjord

- 2 Advance to the Customer Ship-To frame and add the first ship-to location.

Field	Data
Code:	f001
Name:	Explorer Assembly Plant
<Country Code>:	USA

- 3 Add the second ship-to location by entering:

Field	Data
Code:	f002
Name:	Mustang Assembly Plant
<Country Code>:	USA

Customer Calendars


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QCS Setup



- ▲ Item Records *
- ▲ Customer Records *
- ▲ Customer Calendars
- ▲ QCS Control Files
- ▲ Status Codes
- ▲ EDI/eCommerce *
- ▲ Sequence Scheduled Order

* Optional

QAD

CSS-SU-160

QAD SE allows you to define calendars matching your customer's work schedule (for the ship-to location). The system uses this calendar when calculating shipments for the customer. This calendar:

- Identifies the customer's holidays, shutdowns, hours, etc.
- Allows you to calculate a ship date acceptable to you and your customer

Customer Calendar Maintenance (7.3.1)

Customer Calendar Maintenance (7.3.1)

Customer/Ship-To: 1004000 WORLDWIDE BUSINESS SUPPLY

Work Day	Hours
Sunday: ☐	0.00
Monday: ☒	8.00
Tuesday: ☒	8.00
Wednesday: ☒	8.00
Thursday: ☒	8.00
Friday: ☒	8.00
Saturday: ☐	0.00

Operating Day Hour Exceptions

Reference:

Start:

End: Daily Hours:

Back Next

QAD Proprietary CSS-SU-170

Use Customer Calendar Maintenance (7.3.1) to set up a customer calendar.

- Useful when a customer has a work schedule different from your company's work schedule
- Specify your customer's work days and their hours of operation
- Can specify exceptions to the customer's calendar

System checks the calendar when calculating the required ship schedule for the customer so releases do not occur on the customer's non-working days.

- If you do not set up a customer calendar, system uses your shop calendar (set up in Calendar Maintenance (36.2.5))

Two additional frames let you specify exceptions to your customer's regular work week:

- Operating Day Hour Exceptions
 - Specify exceptions to the regular work week (e.g., shutdown periods)
 - Specify a start and end date
 - Reference only, not used in schedule calculations
- Non-Operating Days
 - Specify a date

Exercise: Customer Calendar

Each ship-to location needs a calendar.

Use Customer Calendar Maintenance (7.3.1). For each calendar accept the default values.

- 1 Create a calendar for the first plant by entering:

Field	Data
Customer Ship-To:	f001

- 2 Create a calendar for the second plant by entering:

Field	Data
Customer Ship-To:	f002

QCS Control Files Setup



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QCS Control Files Setup

- ▲ Sequence Schedule Control File (7.5.4.24)
- ▲ Customer Controls Maintenance (7.5.4.1)

QAD Proprietary

CSS-SU-190

Control files contain parameters which tell the system how processing takes place and what defaults to use. Two control files are available to use when setting QCS control parameters.

- Sequence Schedule Control File (7.5.4.24)
 - Required
 - Enables QCS
 - System wide, affecting all sequence schedules
- Customer Controls Maintenance (7.5.4.1)
 - Optional
 - Use to set custom control parameters for an individual customer
- Overrides the settings in Sequence Schedule Control File for the individual customer

Sequence Schedule Control (7.5.4.24)

Sequence Schedule Control

Sequence Schedule Control X

Go To Actions Copy Print Preview

Enable Sequence Schedules: ☒ ←

Schedule Order Default: ☒

Include Seq in Req Ship Sched: ☒

Firm Days: 5

Packing Order: Forward

Sequences Per Container: 0

Merge Schedules: ☐

Check Sequence Tolerance: ☒

Maximum Tolerance: 2

Print Sequence Range on Shipper: ☒

Print Sequence Range on Invoice: ☒

Send Sequence with ASN: ☒

Send Sequence with Invoice: ☒

Set to Yes to Activate Sequence Schedules

Back Next

Sequence Schedule Control (7.5.4.24)

QAD Proprietary CSS-SU-210

Use Sequence Schedule Control File (7.5.4.24) to enable QCS functionality and to set the system wide defaults.

QCS Control Files



QCS Setup



- ▲ Item Records *
- ▲ Customer Records *
- ▲ Customer Calendars
- ▲ QCS Control Files
- ▲ Status Codes
- ▲ EDI/eCommerce *
- ▲ Sequence Scheduled Order

* Optional

QADCSS-SU-200

Note When you initially enable QCS, certain programs are automatically updated to be used with QCS. If you deactivate QCS after enabling it, the modified programs function as they did before they were updated.

Sequences Per Container Option: Example

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Sequences Per Container Option: Example

Ship To: 01000036
Northwest Reliable
1000 B Street

SIMULATION
PICKLIST / PRE-SHIPPER
SEQUENCE PACK LIST
Pre-Shipper: P00000289
Page: 2

Coos Bay
United States of America

Packing Order: forward
Sequences Per Container: 2

Customer Dock:
Line Feed:

Container Parameter

Customer Job
Customer Sequence
Seq Customer Reference

Pack Seq	Customer Reference	Item Number	Quantity	UM	Status
1	20000131 001 1R1234XYZ006	88-100	1.0	EA	
2	20000131 002 1R1234XYZ007 Container ()				
3	20000131 003 1R1234XYZ008	88-100	1.0	EA	
4	20000131 004 1R1234XYZ009 Container ()	88-100	1.0	EA	

Separator

QAD Proprietary

CSS-SU-220

The above shows an example of a Sequence Pack List and the number of sequences per container for a shipment.

- Sequences Per Container field set to 2 in the control file
 - Two sequences are to be packed in each container

Tolerance Checking: Example

The screenshot displays the 'Sequence Schedule Maintenance' window in the QAD system. The window title is 'Sequence Schedule Maintenance (7.5.4.5)'. It features a menu bar with 'Go To', 'Actions', 'Copy', 'Print', and 'Preview'. The main form contains the following fields and options:

- Ship-From: 100 (with a dropdown arrow) and 'Your Main Warehouse' (with a dropdown arrow)
- Ship-To: 00010006 (with a dropdown arrow) and 'Customer' (with a dropdown arrow)
- Release ID: 1 (with a dropdown arrow)
- Active: ☐
- Create Date: (empty)
- Cumulative: ☐
- Packing Order: Reverse
- Sequences Per Container: (empty)
- Check Sequence Tolerance: ☐
- Maximum Tolerance: (empty)
- Schedule Date Type: Delivery
- Active Start: (empty)
- Active End: (empty)

A blue arrow points from a callout box to a warning message box. The callout box contains the text: 'System displays a warning message'. The warning message box contains the text: 'WARNING: SEQUENCE TOLERANCE EXCEEDED. PRIOR SEQUENCE:006'. At the bottom right of the window are 'Back' and 'Next' buttons.

QAD Proprietary CSS-SU-230

The above shows an example of tolerance checking in effect when adding a sequence record in Sequence Schedule Maintenance (7.5.4.5).

- Check Sequence Tolerance option is turned on
- Specified Maximum Tolerance value exceeded

Print Sequence Range on Pre-Shipper: Example

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Print Sequence Range on Pre-Shipper: Example

Quality Products Inc.
Div/Consolidated Corporation
Suite 1, Consolidated Bldg.
One Consolidated Plaza
San Diego, CA 92130

United States of America

Sold To: 01000036

Northwest Reliable
1000 B Street
Coos Bay
United States of America

Ship Via:
FOB Point: ESCONDIDO

P R E - S H I P P E R

Pre-Shipper ID: P00000288
Ship Date: 02/01/00
Print Date: 02/01/00
Page: 1

Ship To: 01000036

Northwest Reliable
1000 B Street
Coos Bay
United States of America

Mode of Transport:
Carrier Shipment Ref: P00000288
Vehicle ID:

Sequence Ranges

Item Number	PO Number	Qty Shipped	Cumulative Qty Shipped UM
88-100		5.00	5.00 EA

Sequence Ranges

Customer Job: 20000128

Customer Sequence	To
001	005

QAD Proprietary CSS-SU-240

Sequence Range on Pre-Shipper

The above shows an example of a sequence range printed on a pre-shipper.

Check the Print Sequence Range on Shipper field to Yes in control file.

Print Sequence Range on Invoice: Example

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Print Sequence Range on Invoice: Example

Quality Products Inc.
Div/Consolidated Corporation
Suite 1, Consolidated Bldg.
One Consolidated Plaza
San Diego, CA 92130
United States of America

Bill To: 01000036

I N V O I C E

Invoice: IV645 Revision: 0
Invoice Date: 02/01/00 Page: 1
Print Date: 02/01/00

Sold To: 01000036

Sequence Ranges

Item Number	UM	Shipped	Backorder Tax	Price	Ext Price
88-100	EA	5.0	0.0 no	100.00	500.00
CASE, AUTO-UNIT					

Customer Job: 20000128

Sequence Ranges

Customer Sequence	To
001	005

QAD Proprietary CSS-SU-250

Sequence Range on Invoice

The above shows an example of a sequence range printed on an invoice.

- Print Sequence Range field on Invoice set to Yes in control file

Including sequence information on the invoice gives the supplier and the customer better visibility of the items being shipped and received.

- Sequence information on the invoice can be used for self-billing

Exercise: Enable Customer Sequence Schedules

Before you can create a sequence scheduled order, you must enable sequence schedules.

Use Sequence Schedule Control File (7.5.4.24).

- 1 Turn on the Customer Sequence Schedules module.

Field	Data
Enable Sequence Schedules:	Yes
Schedule Order Default:	Yes
Include Seq in Req Ship Sched:	Yes
Firm Days:	0
Packing Order:	Forward
Sequences Per Container:	0
Merge Schedules:	No
Check Sequence Tolerance:	No
Maximum Tolerance:	0
Print Sequence Range on Shipper:	Yes
Print Sequence Range on Invoice:	Yes
Send Sequence with ASN:	Yes
Send Sequence with Invoice:	Yes

Customer Controls Maintenance (7.5.4.1)

Customer Controls Maintenance

Ship-To: 1004000 WORLDWIDE BUSINESS SUPPLY

Include Seq in Req Ship Sched: ☒

Firm Days: 5

Packing Order: Forward

Sequences Per Container: 0

Merge Schedules: ☐

Check Sequence Tolerance: ☒

Maximum Tolerance: 0

Print Sequence on Shipper: ☒

Print Sequence on Invoice: ☒

Send Sequence with ASN: ☒

Send Sequence with Invoice: ☒

Settings Only Apply To This Customer / Ship-To Address

Delete Back Next

Customer Controls Maintenance (7.5.4.1)

QAD Proprietary CSS-SU-270

Use Customer Controls Maintenance (7.5.4.1) to create customer control records. These are customer specific default values that are different from the system wide default values specified in the Sequence Schedule Control File (7.5.4.24). This gives you the ability to set up customize parameters for an individual customer or ship-to address.

- Except for the Ship-To, all values default from the Sequence Schedule Control File
- Settings entered here default to sequence schedules created for the ship-to address
- These settings override the corresponding Sequence Schedule Control File settings for the individual customer/ship-to address

Note Customer control settings are optional.

Status Codes



QCS Setup



- ▲ Item Records *
- ▲ Customer Records *
- ▲ Customer Calendars
- ▲ QCS Control Files
- ▲ Status Codes
- ▲ EDI/eCommerce *
- ▲ Sequence Scheduled Order

* Optional

QAD CSS-SU-280

Generalized Codes Maintenance (36.2.13)

Generalized Codes Maintenance

Field Name: rcsd_Status
Value: Offline

Comments: Sequence is off customer production line

Delete Back Next

Generalized Codes Maintenance (36.2.13)

QAD Proprietary CSS-SU-290

Use Generalized Codes Maintenance (36.2.13) to set up status codes.

- Status codes are used in the Status field of Sequence Schedule Maintenance (7.5.4.5)
- Allow you to create user-defined entries (e.g., Offline)
- Can use to create a Blank status code
 - Value field would be <blank>
- Creating status codes is optional

Exercise: Create Status Codes

In the following exercises you need to use status codes.

Use Generalized Codes Maintenance (36.2.13).

- 1 Create three status codes entries. Enter the following:

Field	Data
Field Name:	rcsd_status

- 2 Create a second status code by entering:

Field	Data
Field Name:	rcsd_status
Value:	9000
Comments:	9000-series part - special build

- 3 Create a third status code by entering:

Field	Data
Field Name:	rcsd_status
Value:	offline
Comments:	Vehicle is offline

EDI/eCommerce



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QCS Setup

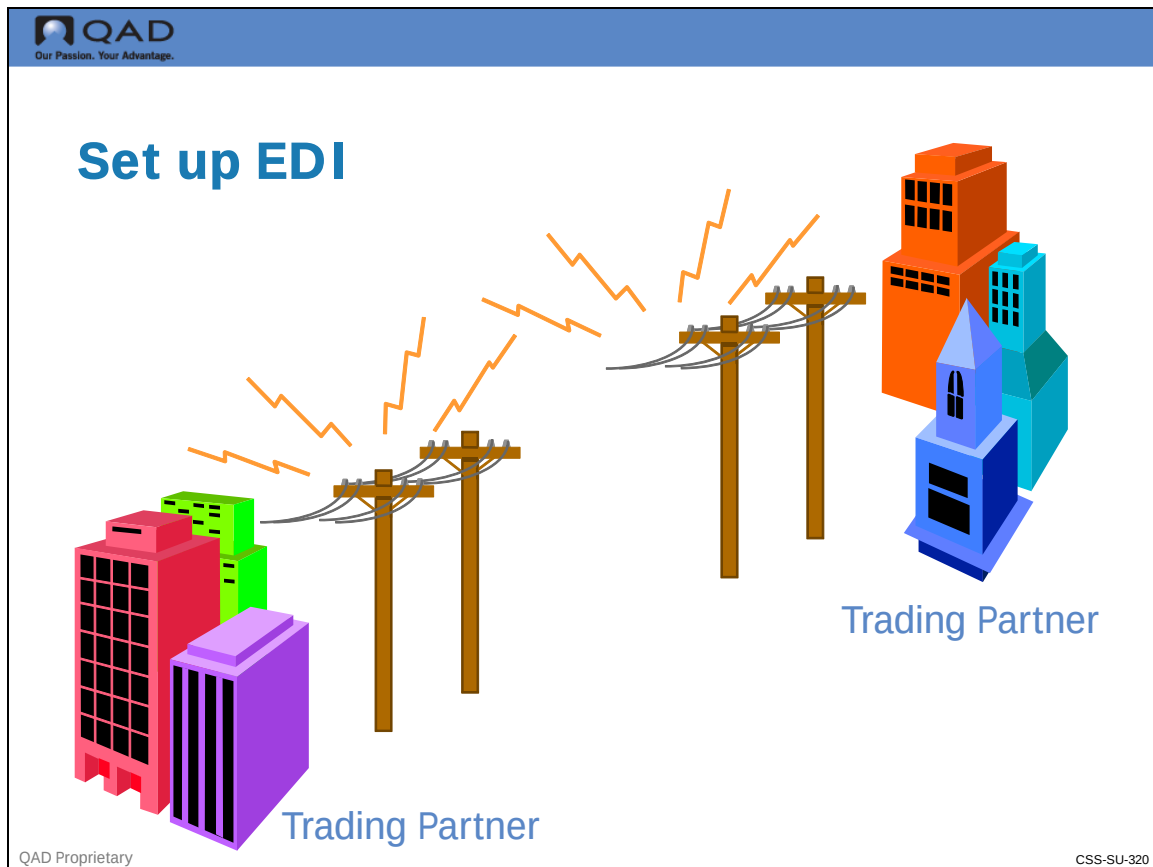


- ▲ Item Records *
- ▲ Customer Records *
- ▲ Customer Calendars
- ▲ QCS Control Files
- ▲ Status Codes
- ▲ EDI/eCommerce *
- ▲ Sequence Scheduled Order

* Optional

QAD CSS-SU-310

Set up eCommerce



You use the following functions to set up eCommerce data:

- Exchange Definition Maintenance (35.15.6)
- Application Definition Maintenance (35.15.10)
- Transformation Definition Maintenance (35.15.17)
- Trading Partner Maintenance (35.13.7)
- Trading Partner Parameter Maintenance (35.13.10)

Exchange Definition Maintenance (35.15.6)

File: MFG850 Version: 1 Direction: Out
 Desc: MFG850 Flat File Advanced: ☐

Seq	Record Name	Requirement	Loop Occur	Loop End	Seq Fields	XML
1	Header	Man	1	99	☐	☐
2	Header-Comments	Optional	99	2	☐	☐
12	Line-Items	Optional	99999	19	☐	☐
14	SalesOrderBill	Optional	999	14	☐	☐
19	Line-Comments	Optional	999	19	☐	☐

Exchange Definition Maintenance (35.15.6)

QAD Proprietary CSS-SU-430

Use Exchange Definition Maintenance (35.15.6) to define the layout and content of exchange file documents.

Note An exchange file defines documents communicated between EC subsystems and QAD SE.

Exchange Definition Maintenance (35.15.8)

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Exchange Definition Maintenance

Exchange Definition Maintenance... X

Go To Actions Copy Print Preview

File: MFG850 Version: 1 Direction: Out
Desc: MFG850 Flat File Advanced: ☐

Exchange File Field Record: Header

Seq	Name	Reqd	Type	Min	Max	Token	Adv
1	ShipTo	Opt	an	1	24		☐
2	ShipFrom	Optional	an	1	24		☐
3	PONumber	Optional	an	1	10	tp-document-nbr	☐
4	Filler1	Optional	an	1	1		☐
5	CreditTerms	Optional	an	1	8		☐
6	Filler2	Optional	an	1	1		☐
7	FOB	Optional	an	1	20		☐
8	Filler3	Optional	an	1	1		☐
9	DueDate	Optional	d	1	6		☐
10	Filler4	Optional	an	1	4		☐
11	ShipToName	Optional	an	1	28		☐

Delete Back Next

Exchange Definition Maintenance (35.15.6)

QAD Proprietary CSS-SU-440

In this frame you identify the document for which you are creating an exchange file definition.

- Cust-Seq-Sched

Exchange File Field Record: Header Frame

This frame displays only if Fields is set to Yes for the selected record.

Application Definition Maintenance (35.15.10)

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Application Definition Maintenance

Application Definition Maint x

Go To Actions Copy Print Preview

Name: MFG850
Gateway Prgm: edompopr.p

Version: 1
Gateway Rpt Prgm: edompopr.p
Gateway Process Priority: 1

Direction: Out
QAD

Application File Records

Seq	Record Name	Requirement	Loop Occur	Loop End	Seq Fields
1	HDR	Man	1	0	☐
2	HDR-CMT	Optional	99	2	☐
3	DET	Mandatory	999	5	☐
4	DET-EXT	Optional	99	4	☐
5	DET-CMT	Optional	99	5	☐

Delete Back Next

Application Definition Maintenance (35.15.10)

QAD Proprietary
CSS-SU-450

Use Application Definition Maintenance (35.15.10) to set up individual application template document definition.

Implementation Definition Maintenance (35.15.13)

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Implementation Definition Maintenance

Implementation Definition Maint x

Go To Actions Copy Print Preview

Implementation Name: Schedule Version: 1
Application Name: customer-schd Version: 1
Direction: In Desc: 866 Schedule
Advanced: ☐ Print Gateway Error Data: ☐

Implementation File Records

Seq	Record Name	Requirement		Loop End	Seq Fields	XML
1	HDR	Man	1	0	☐	☐
2	HDR-EXT	Optional	1	0	☐	☐
3	HDR-CMT	Optional	999	0	☐	☐
4	DET	Mandatory	999999	7	☐	☐
5	DET-EXT	Optional	1	0	☐	☐
6	DET-CMT	Optional	999	0	☐	☐
7	ATH	Optional	100	0	☐	☐

Delete Back Next

QAD Proprietary Implementation Definition Maintenance (35.15.13) CSS-SU-460

Use Implementation Definition Maintenance (35.15.13) to define the data exchange requirements for a specific trading partner implementation.

Transformation Definition Maintenance (35.15.17)

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Transformation Definition Maintenance

Transformation Definition Maint ✕

Go To Actions Copy Print Preview

Transformation: MFG850
Exchange File Name: MFG850
Application: MFG850
Implementation Name: MFG850

Dir: In
Version: 1
Version: 1
Version: 1

Can Run: ☒
Debug level: 0
Many to Many: ☐

Transformation File Records

Record Name	Ev	Seq	EQ	TQ	Target	Type	SQ	Source
Header	RE	10	E	I	Header	Read		
Header	RE	20	E	O	HDR.order-date	Equat	F	SysDate
Header	RE	30	E	O	HDR.tp-ship-to	Equat	F	getMFGPROAddress
Header	RE	40	E	O	HDR.tp-ship-fro	Equat	F	getMFGPROSite
Header	RE	50	E	O	HDR.purchase-or	Equat	I	Header.PONumber
Header	RE	60	E	O	HDR.credit-term	Equat	I	Header.CreditTe
Header	RE	70	E	O	HDR.due-date	Equat	I	Header.DueDate
Header	RE	80	E			If	F	notblank
Header	RE	90	E	O	HDR.due-date	Equat	F	ToDate
Header	RE	100	E			EndIf		

Delete Back Next

QAD Proprietary
Transformation Definition Maintenance (35.15.17)
CSS-SU-470

Use Transformation Definition Maintenance (35.15.17) to define the maps needed to convert between exchange file data and QAD SE data.

- Inbound map representing Customer's sequenced schedule

Trading Partner Maintenance (35.13.7)


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Trading Partner Maintenance

Trading Partner Maintenance
Go To Actions Copy Print Preview

TP ID: HAUSEV
Name: HONDA ALABAMA (USEV)

Trading Partner Document Records

TP Doc ID	Dir	Document Map	Transmission Group	Token List	T	A	F
830	In	hondadelta-830-dmo			☐	☐	☒
850	In	hondadelta-850-dmo			☐	☐	☐
856	Out	hondadelta-856-dmo	OUTGENQP		☐	☐	☐
862	In	hondadelta-862-dmo			☐	☐	☐

TP Location Cross-Reference

TP Site	TP Address Reference	Token List Values	Site	App Addr	Exp	T/O
192774347	827961264		10000	HAUSEV	☐	☐
21061001	NSE2 01		10000	NSE201	☐	☐
21061001	NSE2 09		10000	NSE209	☐	☐
21061001	NSE5 17		10000	NSE517	☐	☐

Delete Back Next

Trading Partner Maintenance (35.13.7)

QAD Proprietary
CSS-SU-480

- Use Trading Partner Maintenance (35.13.7) to:
- Identify the document types that are exchanged with each trading partner
- Set up cross-references between trading partner documents and QAD SE
- Cross-reference the trading partner's site and address codes to the codes used in QAD SE

Trading Partner Parameter Maintenance (35.13.10)

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Trading Partner Parameter Maintenance

Trading Partner Parameter Mai... X

Go To Actions Copy Print Preview

App Addr: 10001000

TP Address:

App Site: Site-10

TP Site:

Logical Param Desc	Logical Parameter Value
	☐
	☐
	☐
	☐
	☐
	☐
	☐
	☐
	☐

BackNext

Trading Partner Parameter Maintenance (35.13.10)

QAD Proprietary CSS-SU-490

Use Trading Partner Parameter Maint (35.13.10) to assign parameters and values to a variety of trading partner-specific processing actions, such as setting a logical flag.

Sequence Scheduled Order



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QCS Setup



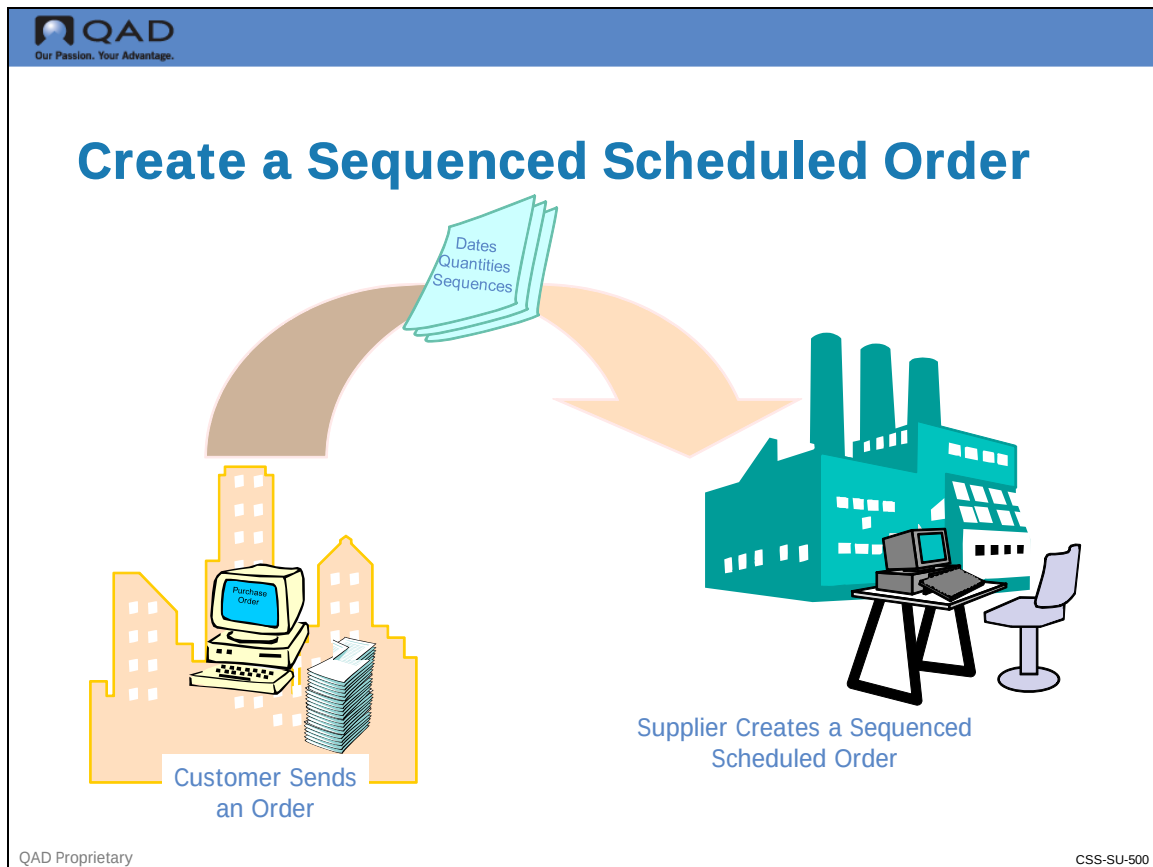
- ▲ Item Records *
- ▲ Customer Records *
- ▲ Customer Calendars
- ▲ QCS Control Files
- ▲ Status Codes
- ▲ EDI/eCommerce *
- ▲ **Sequence Scheduled Order**

* Optional

QAD

CSS-SU-510

Create a Sequenced Scheduled Order



You are now ready to create a sequenced scheduled order for your customer. To do this, you do would use Scheduled Order Maintenance (7.3.13).

- A scheduled order contains the quantities the customer needs and the dates they are needed by
- A sequenced scheduled order tells the supplier's system that the customer will be sending sequence schedule releases

Scheduled Order Maintenance (7.3.13)

Scheduled Order Maintenance

Ship-From: 100 Order: S033696
 Ship-To: CompUS-A CompUS Ship Address A

Order Data

AR Account: 1200 Ship Via: ground
 Taxable: FOB Point:
 Week Offset: 0 Transport Days: 0.00
 Inv by Auth:
 Include Sat/Sun:
 Cumulative:
 Consignment:
 Bill To: CompUS
 Auto Inv Post:
 Import/Export:
 Sequenced: ☒ **Yes Indicates This is a Sequence Scheduled Order**
 Dynamic Unpeg:
 Entered By: mfg
 Remarks:

Customer Ref Is Customer Item:
 Print Invoice History:
 EDI Invoice History:
 Print Pack List:
 Comments:
 AR Site: 100
 Channel:
 Ship to Cum/Req: Cum
 Currency: USD

Back Next

Scheduled Order Maintenance (7.3.13)

QAD Proprietary CSS-SU-520

Use Scheduled Order Maintenance (7.3.13) to create a sequenced scheduled order.

Order Data Frame

In the Order Data frame you set up the scheduled order parameters.

- Setting the Sequenced field to Yes makes this scheduled order a sequenced scheduled order

Tax Data Frame



Tax Data Frame

Scheduled Order Maintenance X

Go To Actions Copy Print Preview

Ship-From: 100 Order: SO33695
Ship-To: 00010006 Customer

Order Data

AR Account: 1200
Taxable: ☐
Week Offset: 0
Inv by Auth: ☐
Include Sat/Sun: ☒
Cumulative: ☐
Consignment: ☐
Bill To: 00010006
Auto Inv Post: ☒
Import/Export: ☐
Sequenced: ☒
Dynamic Unpeg: ☐
Entered By: mlg
Remarks:

Tax Usage:
Tax Environment: NY
Tax Class:
Taxable: ☐
Tax In: ☐

Ship Via: GROUND
0.00

Comments: ☐
AR Site: 100
Channel:
Ship to Cum/Req: Cum
Currency: USD

Back Next

Scheduled Order Maintenance (7.3.13)

QAD Proprietary
CSS-SU-540

The order tax data frame displays for the input of Global Tax Management data.

Line Item Data Frame

Scheduled Order Maintenance

Go To Actions Copy Print Preview

Ship-From: 100 Order: S033695
Ship-To: 00010006 Customer

Item Number: 100634 Finished Good #100634 UM: EA
PO Number:
Customer Ref:
Model Year: Line: 1

Order Line Item Data

Discount Tbl:

List Price:

Net Price:

Sales Account:

Discount Acct:

Consume Forecast: ☒

Type:

Location: FG

Taxable: ☐

Category:

Consignment: ☐

Delete Back Next

Scheduled Order Maintenance (7.3.13)

QAD Proprietary CSS-SU-550

In the line item data frame you identify the item being shipped and the line number.

- Item number
- Customer purchase order number (optional)
- Unit of measure (UM)
- Sequence scheduled order line number
 - Sequential number
 - Can be system assigned or user assignee

Note If your customer has multiple docks, with requirements coming on the same sequence scheduled order, you should create a line for each dock, with the same item number and different purchase orders.

The system asks you if you want to copy order details from another purchase order for the same item.

- If Yes, the system prompts you through the copy
- You need the purchase order number and the sequential line number you are copying from

Order Line Item Data: First Frame


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Order Line Item Data: First Frame

Scheduled Order Maintenance X
Go To Actions Copy Print Preview

Ship-From: 100
Ship-To: 00010006

Order: S033695
Customer

Item Number: 100634
PO Number:
Customer Ref:
Model Year:

Finished Good #100634

UM: EA

Line: 1

Order Line Item Data

Discount Tbl:				Consume Forecast: ☒
List Price:	20.00			Type:
Net Price:	20.00			Location: FG
Sales Account:	3000	100	1000	Taxable: ☐
Discount Acct:	3905	100	1000	Category:
				Consignment: ☐

Delete Back Next

Scheduled Order Maintenance (7.3.13)

QAD Proprietary
CSS-SU-560

There are two Order Line Item Data frames. The first frame contains pricing and inventory information.

Order Line Item Data: Second Frame

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Order Line Item Data: Second Frame

Scheduled Order Maintenance X

Go To Actions Copy Print Preview

Ship-From: 100 Order: S033695
Ship-To: 00010006 Customer

Item Number: 100634 Finished Good #100634 UM: EA
PO Number:
Customer Ref:
Model Year:

1 / 3 - Mon / Wed / Fri

Line: 1

Order Line Item Data

Req Sched Days: 0 Dock:
Req Sched Weeks: 0 Start Effective:
Req Sched Months: 0 End Effective:
Fab Auth Days: 0 Max Order Qty: 0.0
Raw Auth Days: 0 Std Pack Qty: 1
Customer Item:
Container Item: Alternates: ☐
Charge Type:

Plan SDP Code:
Plan SDT Code:
Ship SDP Code:
Ship SDT Code:
Netting Logic:
Cum Start: 12/22/2008
Comments:

Connection with Firm Days

Back Next

Scheduled Order Maintenance (7.3.13)

QAD Proprietary CSS-SU-570

Exercise: Create Scheduled Order

Explorer Assembly Plant

You are now ready to create a Scheduled Order

Use Scheduled Order Maintenance 7.3.13

- 1 Create a scheduled order.

Field	Data
Ship-From:	10000
Ship-To:	f001
Order:	SO100

- 2 Advance to the Order Data frame and enter:

Field	Data
Sequenced:	Yes
Ship Via:	Ground

- 3 Advance to the Sequenced Delivery Data frame and enter:

Field	Data
Incl Seq in Req Ship Sched:	Yes
Firm Days:	0

- 4 Advance to the line item frame and enter:

Field	Data
Item:	part1
Line:	1

- 5 Advance to the second Order Line Item Data frame and enter:

Field	Data
Req Sched Days:	5
Req Sched Weeks:	3
Req Sched Months:	1
Netting Logic:	1

- 6 Return to the line item frame. You are going to create a second line, for part2.

Advance to the line item frame and enter:

Field	Data
Item:	part2
Line:	2

- 7 Advance to the second Order Line Item Data Frame and enter:

Field	Data
Req Sched Days:	5
Req Sched Weeks:	3

Field	Data
Req Sched Months:	1
Netting Logic:	2

- 8 Return to the line item frame. You are going to create a third line, for part3.

Field	Data
Item:	part3
Line:	3

- 9 Advance to the second Order Line Item Data frame and enter:

Field	Data
Req Sched Days:	5
Req Sched Weeks:	3
Req Sched Months:	1
Netting Logic:	3

- 10 Return to the line item frame. You are going to create a fourth line, for part4.

Field	Data
Item:	part4
Line:	4

- 11 Advance to the second Order Line Item Data frame and enter:

Field	Data
Req Sched Days:	5
Req Sched Weeks:	3
Req Sched Months:	1
Netting Logic:	4

- 12 Return to the line item frame. You are going to create a fifth line, for part5.

Field	Data
Item:	part5
Line:	5

- 13 Advance to the second Order Line Item Data frame and enter:

Field	Data
Req Sched Days:	5
Req Sched Weeks:	3
Req Sched Months:	1
Plan SDP Code:	20 (1/5 Monday through Friday)
Netting Logic:	3

QCS Setup Summary



QCS Setup Summary



- ▲ Item Records *
- ▲ Customer Records *
- ▲ Customer Calendars
- ▲ QCS Control Files
- ▲ Status Codes
- ▲ EDI/eCommerce *
- ▲ Sequence Scheduled Order

* Optional

QADCSS-SU-590

Chapter 4

Loading Sequence Schedule Release

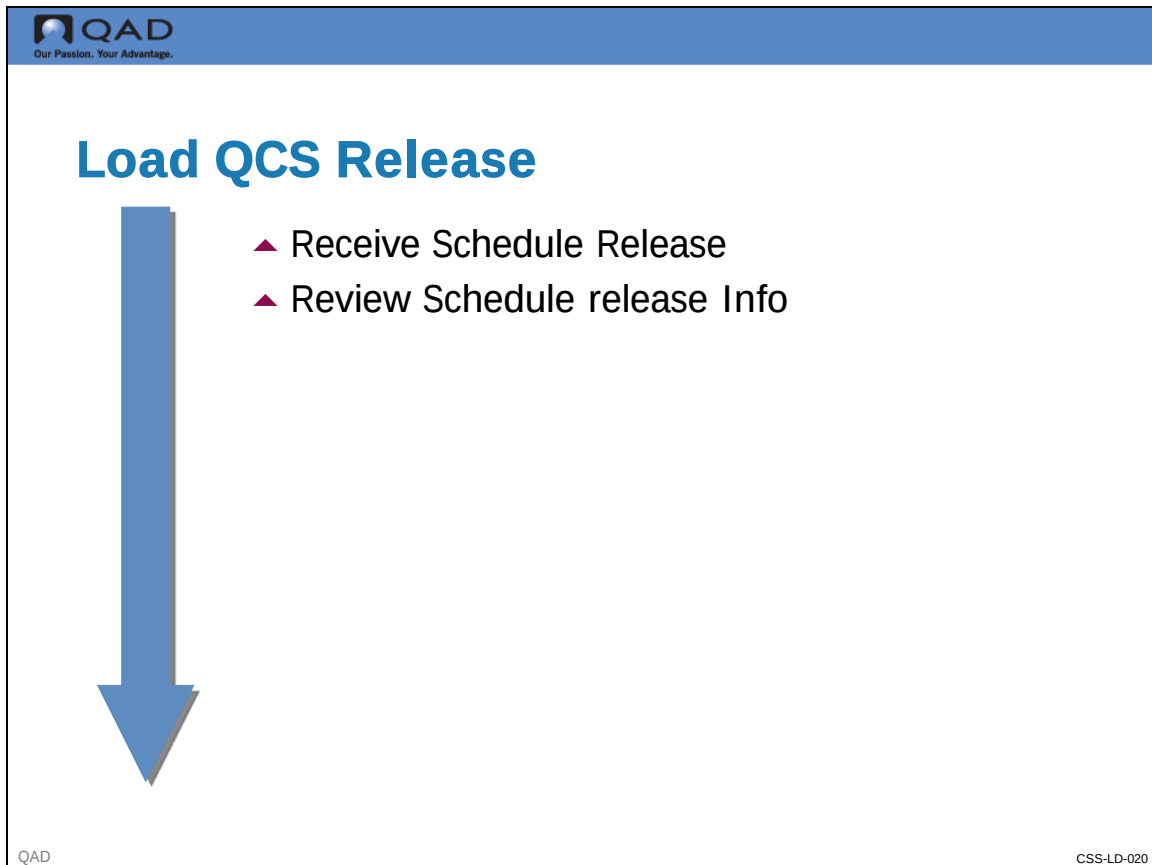


Load QCS Release

In this section you learn how to:

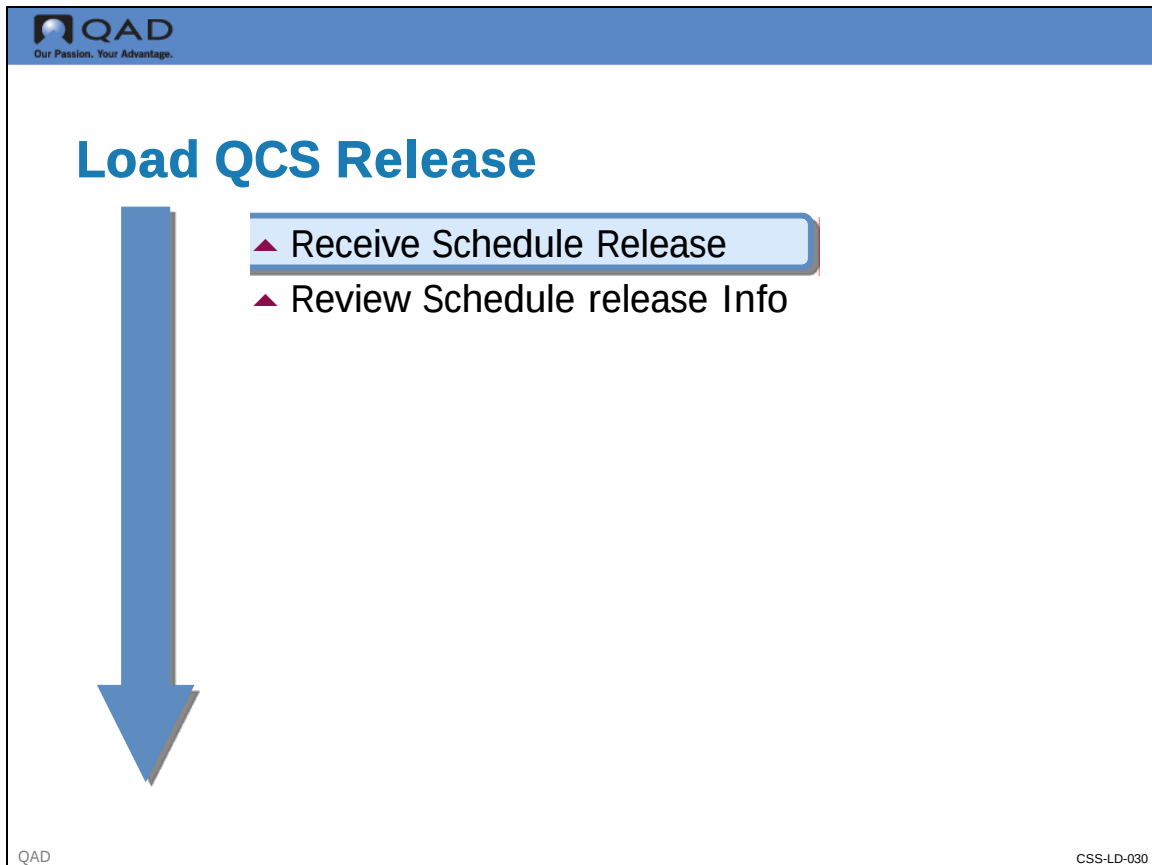
- ▲ Identify key business considerations before setting up QCS in QAD Standard Edition
- ▲ Set up QCS in QAD Standard Edition
- ▲ Loading QCS in QAD Standard Edition
- ▲ Planning QCS in QAD Standard Edition
- ▲ Shipping QCS in QAD Standard Edition
- ▲ QCS Features and Options

Load QCS Release



This illustration is a suggested setup sequence of master files for the QCS module which is based on information that flows from one master file to another and prerequisites that need to be accomplished before setting up a file.

Receive Schedule Release



Once you have set up a customer's sequence scheduled order, you are ready to start receiving their schedule releases.

- Sequence schedule releases contain the customer's demand requirements
 - Dates, times, and quantities
- The most recently received schedule release normally supersedes all previous schedule releases
 - Raw and fabrication authorization are an exception to this
 - The longest authorizations, calculated by end date, are the valid ones

There are two types of schedule releases supported by QAD SE. Each states how much of a certain item a customer expects to need and when. The primary difference between the two is the planning horizon. The two types of schedule releases are:

- Planning Schedule (830, Delfor)
 - Shows long-term planning (e.g., weekly, monthly buckets)
- Shipping Schedule (862, Deljit)
 - Shows short-term planning (e.g., daily buckets)
 - Usually the more accurate

If there are two schedules, the scheduled order's netting logic (set up in Scheduled Order Maintenance (7.3.13)) determines how to combine the schedules to obtain a RSS.

QAD SE retains every schedule the customer sends until you delete them from the system using Schedule Delete/Archive (7.5.23).

Exercise: Planning Schedule

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

Note No Planning Schedule needed for Line 1.

Use Customer Plan Schedule Maintenance (7.5.1)

- 1 Create a planning schedule for line 2 by entering the following:

Field	Data
Order:	so100
Line:	2
Release ID:	1

- 2 Advance to the lower frame and enter:

Field	Data
Comments:	No
Prior Cum Date:	<Yesterday's Date>
Schedule Data Type:	Ship

- 3 Advance to the Schedule Detail Data frame and enter the following:

Date	Time	Int	Reference	Quantity	Q	Cmt	Rqm Det
Next Monday		W		20	F	No	No
Monday Week +1		W		25	F	No	No
Monday Week +2		M		100	F	No	No

- 4 Enter Yes when the system prompts you to make this schedule active.
- 5 Repeat the process, creating a planning schedule for line 3 by entering:

Field	Data
Order:	so100
Line:	3
Release ID:	1

Note Delete the Ship-From, Ship-To, and Item fields.

- 6 Advance to the lower frame and enter:

Field	Data
Comments:	No
Prior Cum Date:	<Yesterday's Date>
Schedule Data Type:	Ship

- 7 Advance to the Schedule Detail Data frame and enter the following:

Date	Time	Int	Reference	Quantity	Q	Cmt	Rqm Det
Next Monday		W		20	F	No	No
Monday Week +1		W		25	F	No	No
Monday Week +2		M		100	F	No	No

8 Enter Yes when the system prompts you to make this schedule active.

9 Repeat the process, creating a planning schedule for line 4 by entering:

Field	Data
Order:	so100
Line:	4
Release ID:	1

Note Delete the Ship-From, Ship-To, and Item fields.

10 Advance to the lower frame and enter:

Field	Data
Comments:	No
Prior Cum Date:	<Yesterday's Date>
Schedule Data Type:	Ship

11 Advance to the Schedule Detail Data frame and enter the following:

Date	Time	Int	Reference	Quantity	Q	Cmt	Rqm Det
Next Monday		W		20	F	No	No
Monday Week +1		W		25	F	No	No
Monday Week +2		M		100	F	No	No

12 Enter Yes when the system prompts you to make this schedule active.

13 Repeat the process, creating a planning schedule for line 5 by entering:

Field	Data
Order:	so100
Line:	5
Release ID:	1

Note Delete the Ship-From, Ship-To, and Item fields.

14 Advance to the lower frame and enter:

Field	Data
Comments:	No
Prior Cum Date:	<Yesterday's Date>
Schedule Data Type:	Ship

15 Advance to the Schedule Detail Data frame and enter the following:

Date	Time	Int	Reference	Quantity	Q	Cmt	Rqm Det
Next Monday		W		20	F	No	No
Monday Week +1		W		25	F	No	No
Monday Week +2		M		100	F	No	No

16 Enter Yes when the system prompts you to make this schedule active.

Exercise: Shipping Schedule

- 1 Create a shipping schedule for line 1 by entering the following:

Use Customer Ship Schedule Maintenance (7.5.2)

Field	Data
Order:	so100
Line:	1
Release ID:	1

- 2 Advance to the lower frame and enter.

Field	Data
Comments:	No
Prior Cum Date:	<Yesterday's Date>
Schedule Data Type:	Ship

- 3 Advance to the Schedule Detail Data frame and enter the following:

Date	Time	Int	Reference	Quantity	Q	Cmt	Rqm Det
Next Monday		D		5	F	No	No
Tuesday		D		5	F	No	No
Wednesday		D		5	F	No	No
Thursday		D		5	F	No	No
Friday		D		5	F	No	No
Monday Week +1		D		5	F	No	No
Tuesday		D		5	F	No	No
Wednesday		D		5	F	No	No

- 4 Enter Yes when the system prompts you to make this schedule active.

Note No Shipping Schedule needed for line 2.

- 5 Repeat the process, creating a shipping schedule for line 3 by entering:

Field	Data
Order:	so100
Line:	3
Release ID:	1

Note Delete the Ship-From, Ship-To, and Item fields.

- 6 Advance to the lower frame and enter.

Field	Data
Comments:	No
Prior Cum Date:	<Yesterday's Date>
Schedule Data Type:	Ship

- 7 Advance to the Schedule Detail Data frame and enter the following:

Date	Time	Int	Reference	Quantity	Q	Cmt	Rqm Det
Next Monday		D		5	F	No	No
Tuesday		D		5	F	No	No
Wednesday		D		5	F	No	No
Thursday		D		5	F	No	No
Friday		D		5	F	No	No
Monday Week +1		D		5	F	No	No
Tuesday		D		5	F	No	No
Wednesday		D		5	F	No	No

8 Enter Yes when the system prompts you to make this schedule active.

9 Repeat the process, creating a shipping schedule for line 4 by entering:

Field	Data
Order:	so100
Line:	4
Release ID:	1

Note Delete the Ship-From, Ship-To, and Item fields.

10 Advance to the lower frame and enter.

Field	Data
Comments:	No
Prior Cum Date:	<Yesterday's Date>
Schedule Data Type:	Ship

11 Advance to the Schedule Detail Data frame and enter the following:

Date	Time	Int	Reference	Quantity	Q	Cmt	Rqm Det
Next Monday		D		5	F	No	No
Tuesday		D		5	F	No	No
Wednesday		D		5	F	No	No

12 Enter Yes when the system prompts you to make this schedule active.

13 Repeat the process, creating a shipping schedule for line 5 by entering:

Field	Data
Order:	so100
Line:	5
Release ID:	1

Note Delete the Ship-From, Ship-To, and Item fields.

14 Advance to the lower frame and enter.

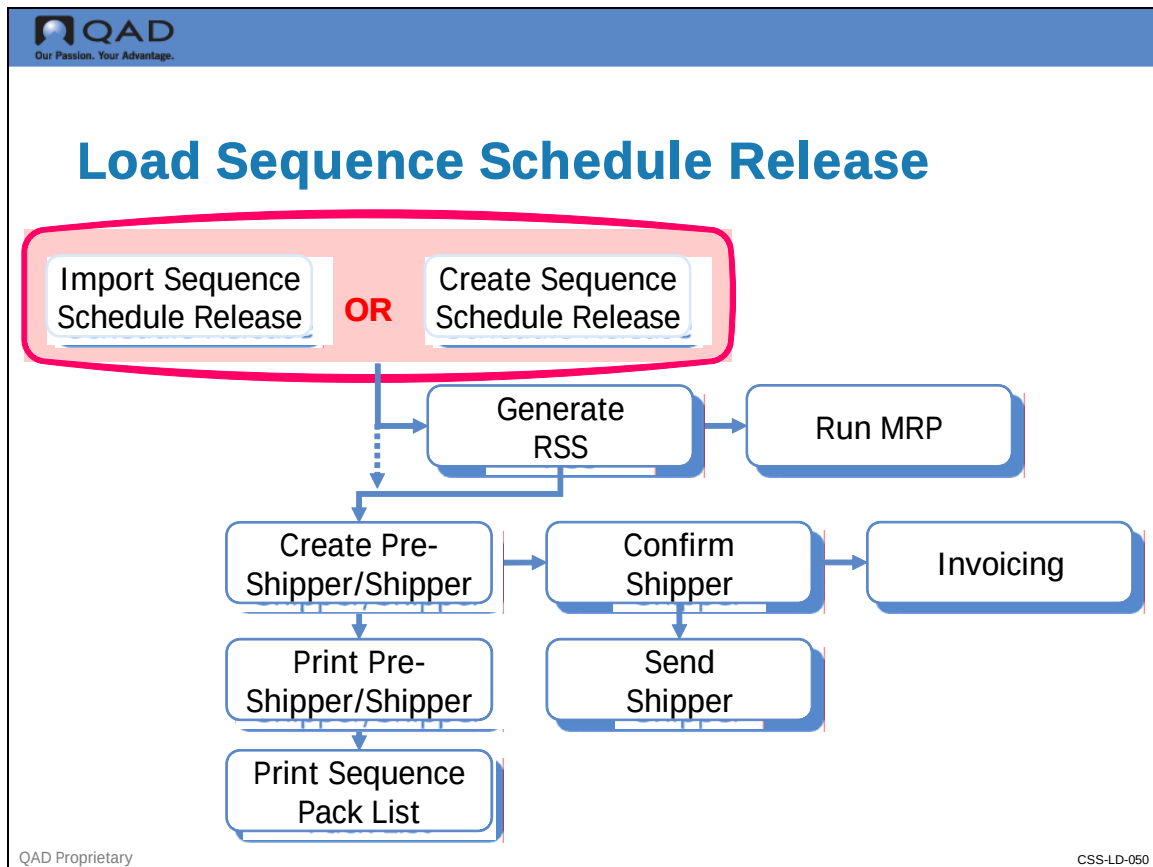
Field	Data
Comments:	No
Prior Cum Date:	<Yesterday's Date>
Schedule Data Type:	Ship

15 Advance to the Schedule Detail Data frame and enter the following:

Date	Time	Int	Reference	Quantity	Q	Cmt	Rqm Det
Next Monday		D		5	F	No	No
Tuesday		D		5	F	No	No
Wednesday		D		5	F	No	No
Thursday		D		5	F	No	No
Friday		D		5	F	No	No
Monday Week +1		D		5	F	No	No
Tuesday		D		5	F	No	No
Wednesday		D		5	F	No	No

16 Enter Yes when the system prompts you to make this schedule active.

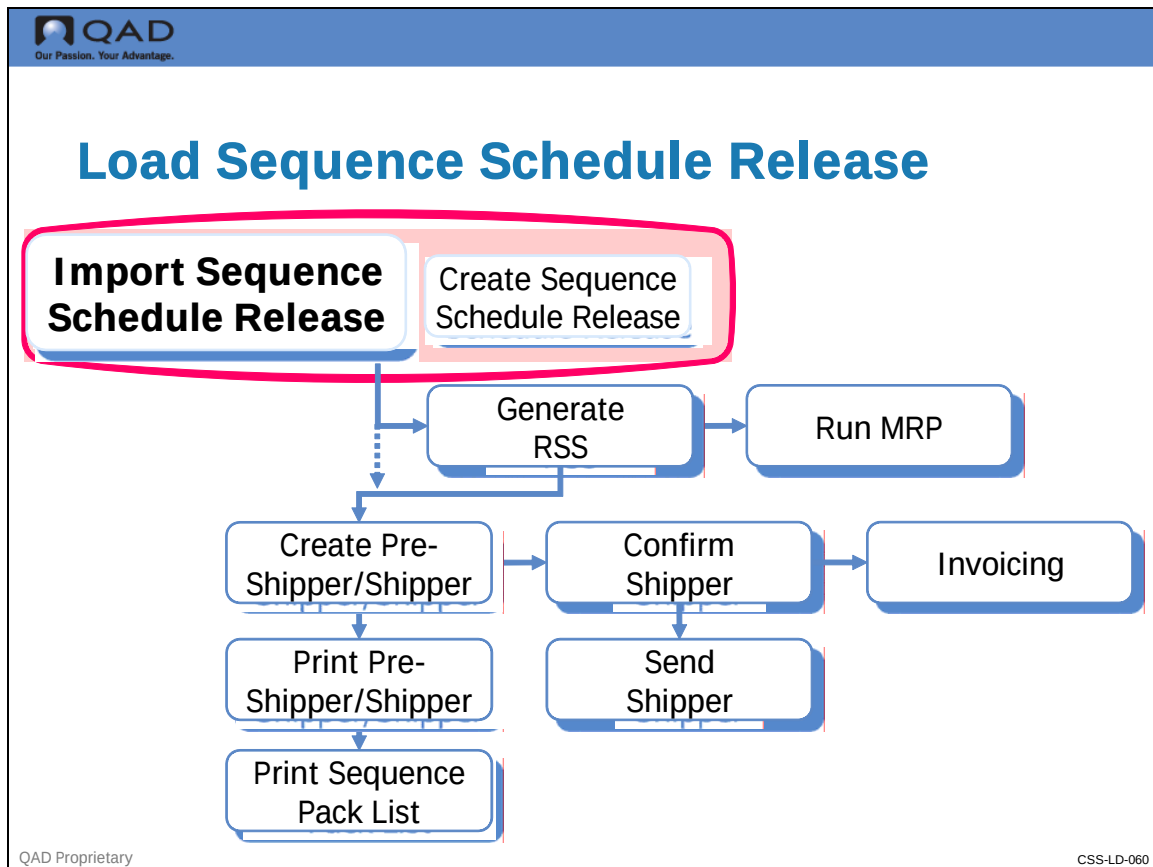
Load Sequence Schedule Release



There are two ways to load a schedule release onto the system so you can begin processing the customer's order:

- Electronically
 - Document Import (35.1) (eCommerce)
 - Shipper Gateway (7.9.22) (ASCII file)
- Manually
 - Sequence Schedule Maintenance (7.5.4.5)

Import Sequence Schedule Release



There are two ways to import a sequence schedule release:

- Import using eCommerce
 - Use Document Import (35.1) (eCommerce)
- Import from an ASCII formatted file from an external system
 - Use Shipper Gateway (7.9.22)

Document Import (35.1)

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Document Import

Document Import x

Go To Actions Copy Print Preview

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

Print Details: ☐ Pre-Select All: ☒

Print Fail/Pass/Both: B Failed

Files:

Sessions:

Output:

Batch ID:

Back Next

Document Import (35.1)

QAD Proprietary CSS-LD-070

Use Document Import to start the process of loading standards neutral format (SNF) files from the eCommerce subsystem, transforming them into formats usable by QAD SE, and transferring them into the QAD SE database using a gateway program.

The system generates a report on the import process.

Note Import directory specified Inbound Directory in the eCommerce Control File (35.21.13.24).

- If Error, system displays only files containing documents that encountered load errors during previous imports

Note Stored in the error file directory specified in the Error File Directory field set in the eCommerce control file.

Shipper Gateway

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Shipper Gateway

Shipper Gateway

Go To Actions Copy Print Preview

Process/File: File

File Name:

Load Multiple Containers: ☐

Verify Only: ☐

Output:

Back Next

QAD Proprietary Shipper Gateway (7.9.22) CSS-LD-080

Use Shipper Gateway import an ASCII formatted file.

- Contains fields for customer sequence information

When you import a shipper gateway file from an external system, the system looks for the corresponding sequence to pick from the sequenced scheduled order. If the corresponding sequence is not found, the system picks the next available sequence.

Exercise: Import Sequence Schedule

Note You can load the schedule electronically via EDI/eCommerce or load the sequence schedule manually. Electronically is the preferable method, but if problems occur then load the sequence schedule manually and continue with the exercises.

Sequence Schedules have been manually loaded in a previous exercise, (Appendix B).

Use Document Import (35.13)

- 1 To import the detail sequence schedule enter the following:

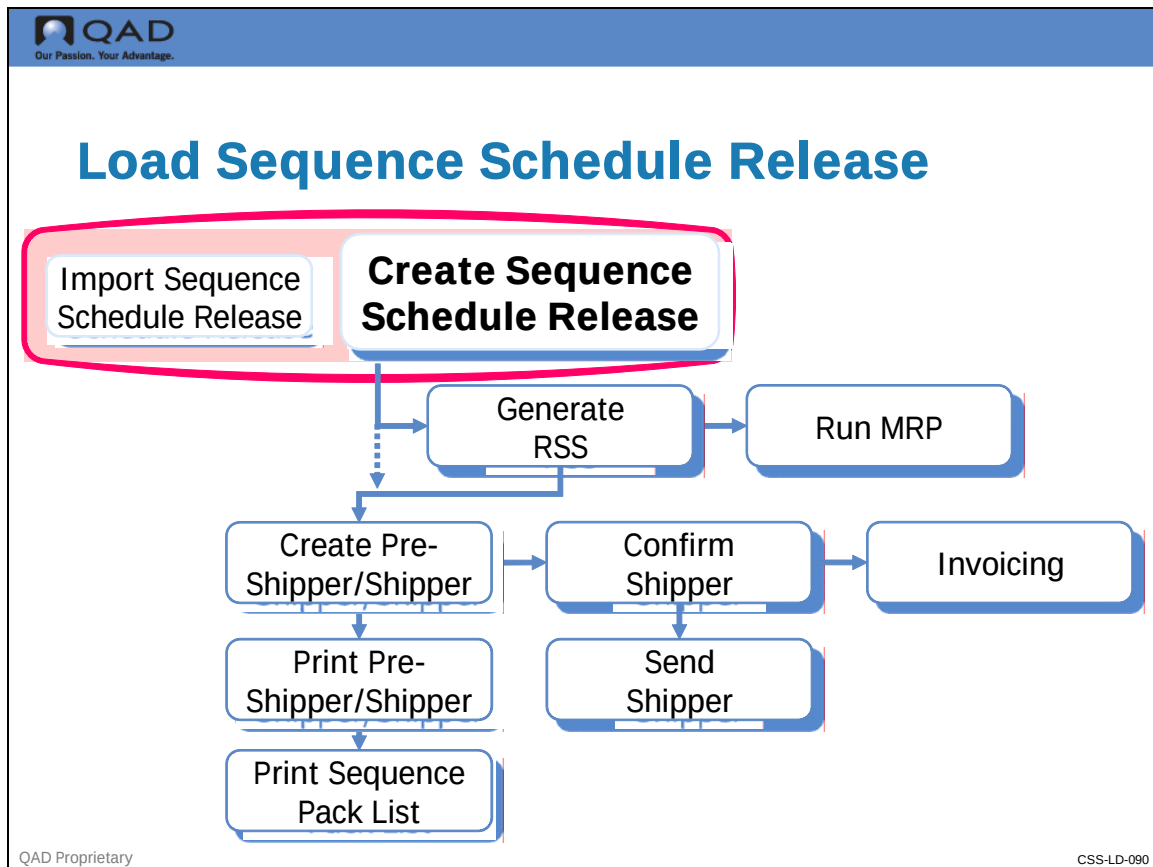
Field	Data
Import from File/Process:	File
Import File/Process Name:	train1.886
Report Detail/Summary:	Detail
Update:	No

Note There should be one warning message, and no error messages.

- 2 Verify the schedule with the table entries found in Manually Create Sequence Schedule on page 315.
- 3 To import the summary sequence schedule enter the following:

Field	Data
Import from File/Process:	File
Import File/Process Name:	train1.886
Report Detail/Summary:	Summary
Update:	No

Create Sequence Schedule Release



You can manually enter a sequence schedule release by using Sequence Schedule Maintenance (7.5.4.5).

Sequence Schedule Maintenance (7.5.4.5)

Sequence Schedule Maintena... X

Go To Actions Copy Print Preview

Ship-From: T12000 Electronics Division

Ship-To: 01000000 Colossal Conglomerates LTD

Release ID: RSS0001 Active: ☐

Create Date:

Cumulative: ☐

Packing Order: Reverse

Sequences Per Container:

Check Sequence Tolerance: ☐

Maximum Tolerance:

Schedule Date Type: Delivery

Active Start:

Active End:

Back Next

QAD Proprietary Sequence Schedule Maintenance (7.5.4.5) CSS-LD-100

Use Sequence Schedule Maintenance (7.5.4.5) to:

- Manually enter (i.e., create) a sequenced schedule release
- Modify existing sequence schedule releases
 - Imported
 - Manually created
- Logically delete sequence records

Creating a New Release

When creating a new release, the system gives you the option of copying all non-deleted sequence records from the current active release to the new release.

If you choose to copy the data from the active release, the system checks to see if any sequences from the active release have been picked. If sequences have been picked, the system asks if you want to create cross-references between the sequences on the new release and the corresponding references on the active release.

- If you choose Yes, the system creates cross-references between the sequences on the new release and the corresponding references on the active release

You cannot pick sequences from the new release that are cross-referenced to sequences on the active release. These cross-referenced sequences have already consumed their requirements.

If you choose No, then the system:

- Copies all sequences from the active schedule to the new schedule
- Resets any sequence records previously marked as picked or cross-referenced

Note By resetting the sequences, the system considers them as open requirements.

When you finish creating the new schedule release, the system prompts you to make the new release the active release.

Header Frame

In the header frame you identify the sequence schedule.

- A scheduled order must already exist for the ship-from/ship-to combination

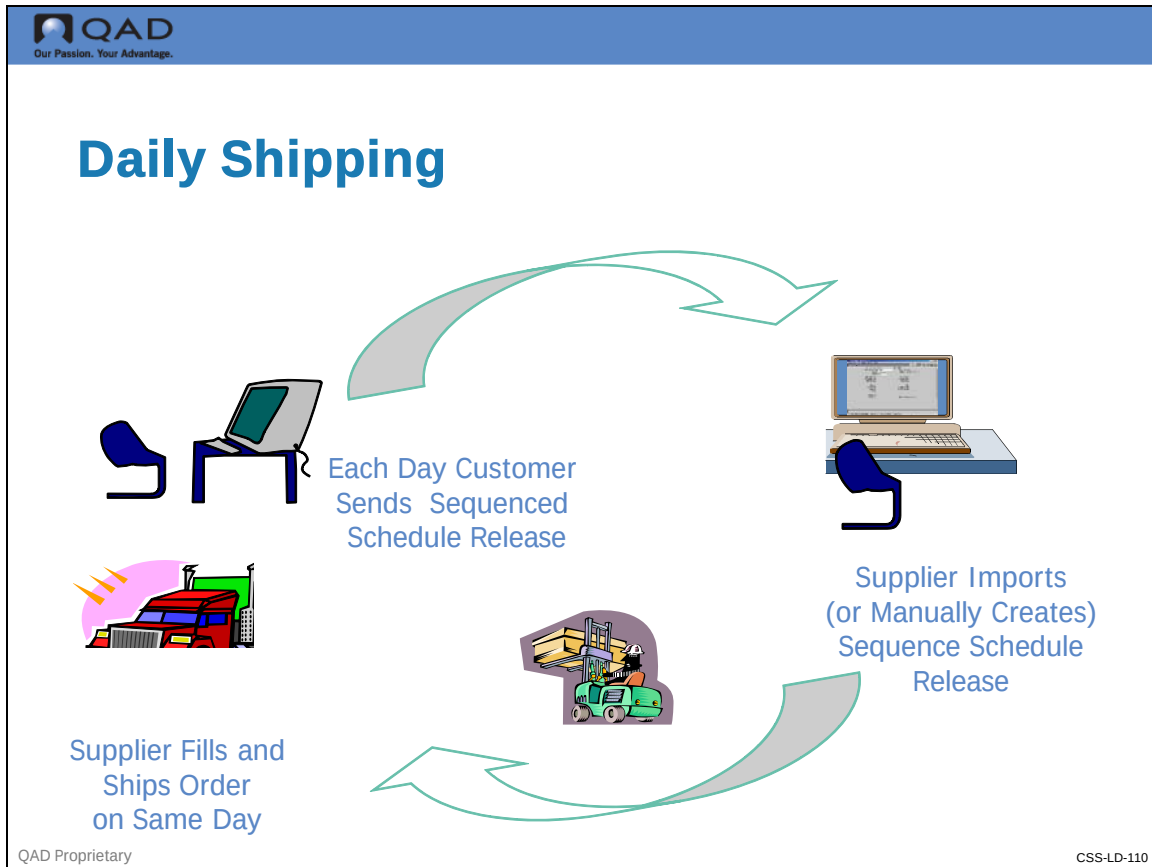
Sequence Schedule Maintenance (7.5.4.5) Detail Data Frame

Use the Sequence Detail Data frame to:

- Create new sequence records
- Edit existing sequence records
- Mark existing sequence records as deleted
 - System makes record inactive for the schedule release
 - Sequence record is marked as deleted, but is not physically removed from the database
 - To permanently delete the record, use Sequence Schedule Detail Delete 7.5.4.22

Note Deleted sequences remain on the schedule, but are not considered for picking or planning. Once deleted, sequences are no longer active and cannot be re-activated.

Daily Shipping



Some suppliers receive sequence schedule releases every morning for that day's deliveries. Basically they ship the same day they receive the schedule release from their customers.

- Supplier ships directly off the sequence schedule release
- No need to create a RSS
- No need to run MRP
 - MRP looks out to the future to plan replenishments
 - Since sequence schedule release is used for the current day, running MRP is not necessary

Review Schedule Release Information



Reviewing Schedule Release Information

You can use any of the following to review and/or compare sequence schedule information. This is particularly useful if you have imported the sequence schedule information.

- ▲ Sequence Schedule Maintenance (7.5.4.5)
- ▲ Sequence Schedule Inquiry (7.5.4.6)
 - Displays all sequences on a sequence schedule release
- ▲ Sequence Schedule Report (7.5.4.7)
 - Prints a report showing a complete sequence schedule release
- ▲ Sequence Schedule Variance Report (7.5.4.16)
 - Compares two sequence schedule releases
- ▲ Plan/Ship Sequence Variance Report (7.5.4.17)
 - Compares specific item requirements on the active sequence schedule to those on the active shipping or planning schedule release

Sequence Schedule Inquiry (7.5.4.6)

Sequence Schedule Inquiry

Sequence Schedule Inquiry X

Go To Actions Copy Print Preview

Ship-From: 110

Ship-To: 1005000

Release ID: RS00001

Active: ☐

Starting Job:

Starting Sequence:

Starting Date:

Output:

Starting Points Allow You to Determine Where to Start Looking

Back Next

Sequence Schedule Inquiry (7.5.4.6)

QAD Proprietary CSS-LD-140

Use Sequence Schedule Inquiry (7.5.4.6) to view sequences on a sequence schedule release.

Can view all or all from a specified starting point

Sequence Schedule Report (7.5.4.7)

Sequence Schedule Report

Sequence Schedule Report x

Go To Actions Copy Print Preview

Ship-From: 110 To: 10

Ship-To: To:

Release ID: To:

Customer Job: To:

Customer Sequence: To:

Line Item Cust Ref: To:

Model Year: To:

Customer Reference: To:

Item Number: To:

Order: To:

PO Number: To:

Status: To:

Ship/Delivery Date: To:

Active/History: Active To:

Include Sequences: 1 1-All, 2-Picked Only, 3-Unpicked Only

Include Deleted: ☐ ← Sequences Marked as Deleted Not Included in the Report

Details: Sub-Totals:

Output: page

Batch ID:

Back Next

QAD Proprietary Sequence Schedule Report (7.5.4.7) CSS-LD-150

Use Sequence Schedule Report (7.5.4.7) to print a report which shows you the complete sequence schedule release.

- Gives you a snapshot of what is going on

The report criteria gives you the option of:

- Including active or history data
- Including:
 - Picked and unpicked sequences
 - Only picked sequences
 - Only unpicked sequences
- Including sequence records marked as deleted
 - If Yes, only sequence records logically deleted will be included in the report
 - If No, only sequence records not marked as deleted will be included in the report

Sample Detail Report



Sample Detail Report

rcrp05.p
Page: 1
7.5.4.7 Sequence Schedule Report
Public Test Progress 91
Date: 01/28/00
Time: 11:29:02

Ship-From: 10000
Customer: GM
Ship-To: orion
Release ID: 991210-22

nj plant
General Motors
Lake Orion Assembly Plant

Active: yes

Schedule Date Type: Delivery
Active Start: 12/09/99
Cumulative: no
Check Sequence Tolerance: yes

Active End:

Create Date: 12/10/99 11:54
Packing Order: forward
Sequences Per Container: 0
Maximum Tolerance: 2

Date: 12/08/99

Customer Job Customer Sequence	Item Status	Order UM Line	Customer Ref PO	Customer Dock Line Feed	Quantity Cum Quantity	Delete
9110	100-1	EA ori-test 1	vin0110 ori-99		1.0	no
	Picked: yes		Pre-Shipper/Shipper: shp99087		Confirmed: yes	
9111	100-1	EA ori-test 1	vin0111 ori-99		1.0	no
	Picked: yes		Pre-Shipper/Shipper: shp99087		Confirmed: yes	
9112	100-1	EA ori-test 1	vin0112 ori-99		1.0	no
	Picked: yes		Pre-Shipper/Shipper: shp99087		Confirmed: yes	
9113	100-1	EA ori-test 1	vin0113 ori-99		1.0	no
	Picked: yes		Pre-Shipper/Shipper: shp99087		Confirmed: yes	

QAD Proprietary
CSS-LD-160

The above shows an example of a Sequence Schedule Report using the Detail report option.



Sample Report with Sub-Totals



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rcrp05.p
Page: 6

7.5.4.7 Sequence Schedule Report
Public Test Progress 91

Date: 01/28/00
Time: 11:29:03

Sample Report with Sub-Totals

Item Sub-Totals By Date

Date	Item Number	Description	Sub-Total	
			Qty	UM
12/08/99	100-1	Blue Overhead Interior	5.0	EA
	100-2	Gray Overhead Interior	7.0	EA
	100-3	Red Overhead Interior	4.0	EA
	100-4	Sand Overhead Interior	1.0	EA
12/09/99	100-1	Blue Overhead Interior	5.0	EA
	100-2	Gray Overhead Interior	4.0	EA
	100-4	Sand Overhead Interior	3.0	EA
12/10/99	100-1	Blue Overhead Interior	6.0	EA
	100-2	Gray Overhead Interior	1.0	EA
	100-3	Red Overhead Interior	1.0	EA
	100-4	Sand Overhead Interior	1.0	EA
12/13/99	100-1	Blue Overhead Interior	5.0	EA
	100-3	Red Overhead Interior	1.0	EA
	100-4	Sand Overhead Interior	1.0	EA

QAD Proprietary

CSS-LD-170

The above graphic shows an example of the report with sub-totals broken out by date.

Exercise: Print Sequence Schedule Report

Use Sequence Schedule Report (7.5.4.7)

- 1 To generate the Sequence Schedule Report enter the following:

Field	Data
Ship-To:	f001
To:	f001
Sub-Totals:	Yes

- 2 Verify all sequences are displayed and the sub-totals are correct for each day.

Sequence Schedule Variance Report (7.5.4.16)

Sequence Schedule Variance Report

Sequence Schedule Variance... x

Go To Actions Copy Print Preview

Ship-From: To:

Ship-To: To:

Item Number: To:

Order: To:

Variance %:

ABC Class:

Current Release ID:

Previous Release ID:

Output:

Batch ID:

Back Next

Sequence Schedule Variance Report (7.5.4.16)

QAD Proprietary CSS-LD-190

Use Sequence Schedule Variance Report to generate a report that compares sequence schedules of different releases.

- Variance percentage reported
- Useful when looking for extremes

Plan/Ship Sequence Variance Report (7.5.4.17)

Plan / Ship Sequence Schedule Variance Report

Plan/Ship Sequence Variance...

Go To Actions Copy Print Preview

Ship-From: To:

Ship-To: To:

Item Number: To:

Order: To:

Variance %: Use to Specify Percentage Reported

ABC Class:

Output:
Batch ID:

Back Next

Plan/Ship Sequence Schedule Variance Report (7.5.4.17)

QAD Proprietary CSS-LD-200

Use Plan/Ship Sequence Variance Report to generate a report comparing sequence schedule to the shipping or planning schedule.

- Variance percentage reported

Chapter 5

Planning

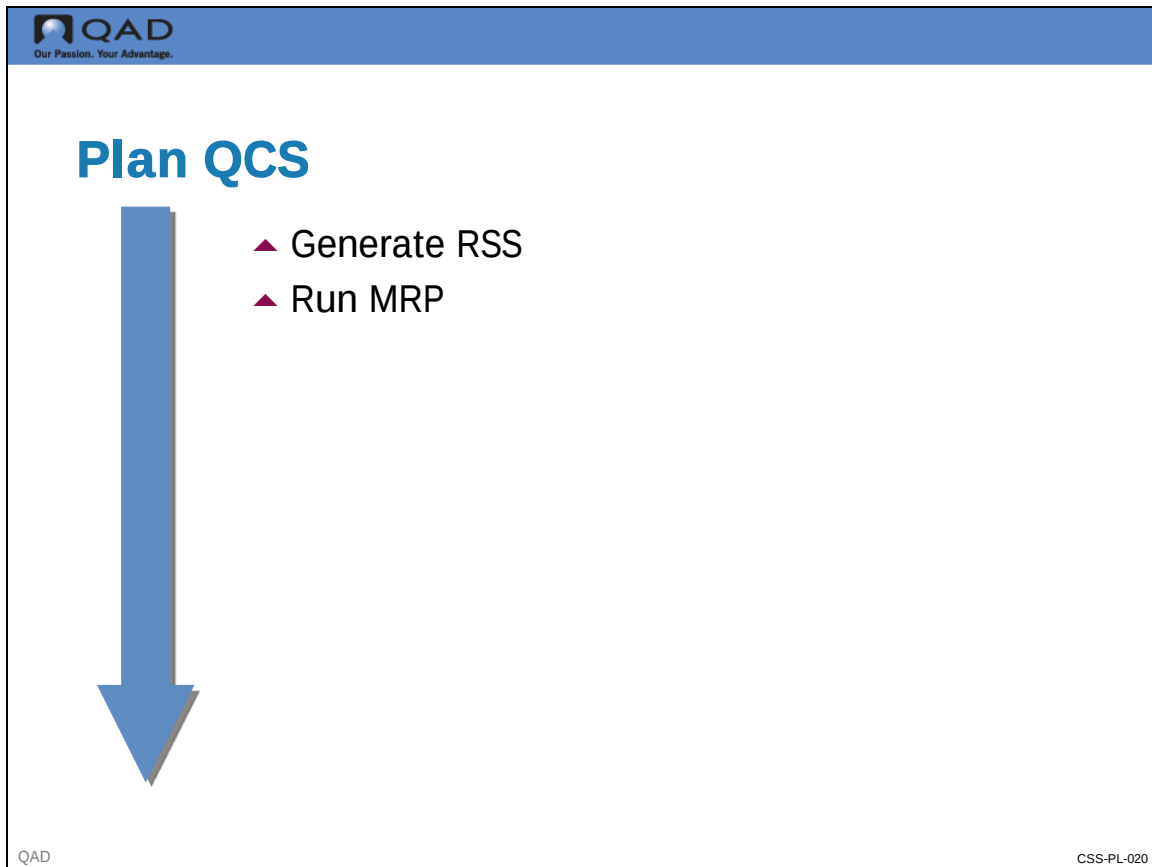


Plan QCS

In this section you learn how to:

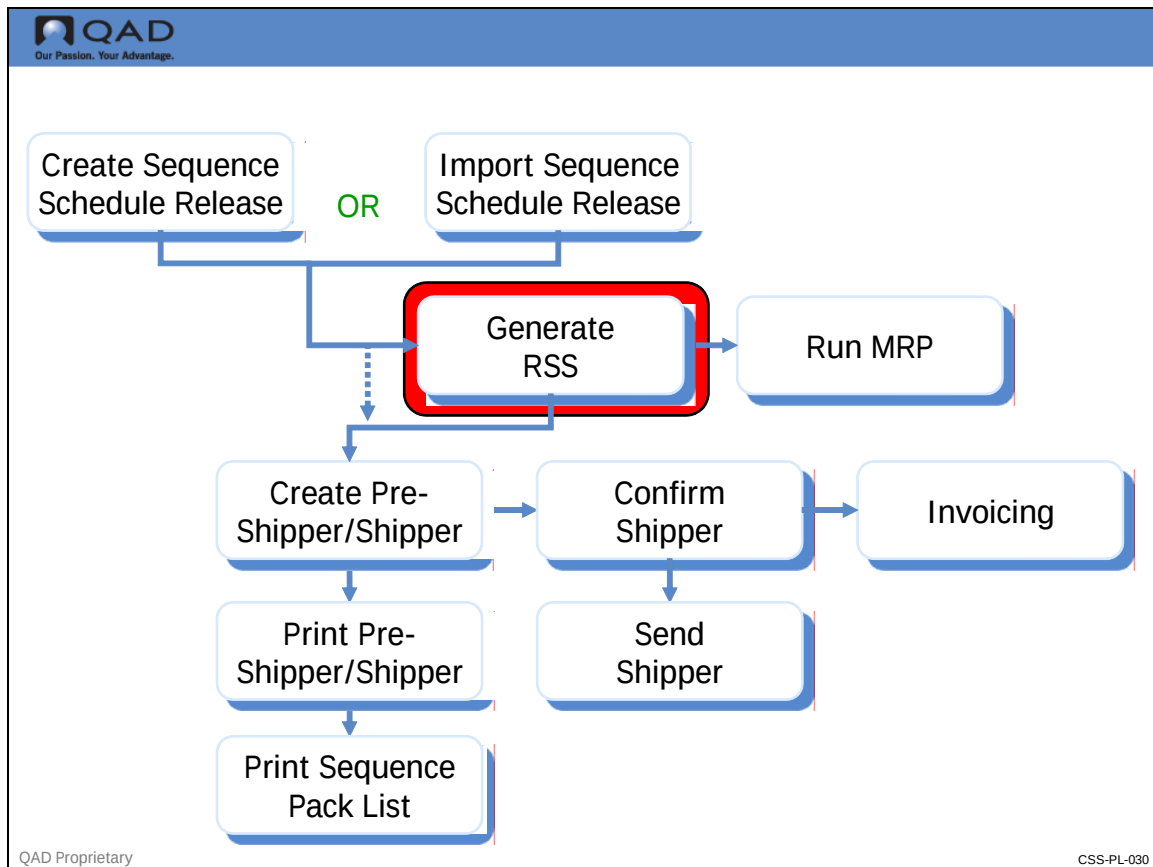
- ▲ Identify key business considerations before setting up QCS in QAD Standard Edition
- ▲ Set up QCS in QAD Standard Edition
- ▲ Loading QCS in QAD Standard Edition
- ▲ Plan QCS in QAD Standard Edition
- ▲ Shipping QCS in QAD Standard Edition
- ▲ QCS Features and Options

Plan QCS



This illustration is a suggested setup sequence of master files for the QCS module which is based on information that flows from one master file to another and prerequisites that need to be accomplished before setting up a file.

Generate RSS



The RSS identifies for a particular customer and sequenced scheduled order, what they need you to ship, on what dates, and by what time.

Basically the RSS has two purposes:

- It supplies MRP with the dates, times, and quantities of the customer's demands
- Provides the information used to instruct the shipping dock what to ship

You create a new version of the RSS using one of the following:

- Required Ship Schedule Update (7.5.5)
- Selective Req Ship Sched Update (7.5.6)

Required Ship Schedule Update (7.5.5)

Required Ship Schedule Update

Ship-From: 100000 To: 200
 Sold-To: 200 To:
 Ship-To: To:
 Dock: To:
 Item Number: To:
 PO Number: To:
 Customer Ref: To:
 Model Year: To:
 Order: To:

Report Detail/Summary: Summary
 Update: Yes ← Determines if RSS is created

Output:
 Batch ID:

F1=Go 2=Help 3=Ins 4=End 7=Recall 8=Clear 11=Paste

QAD Proprietary Required Ship Schedule Update (7.5.5) CSS-PL-050

Use Required Ship Schedule Update to generate a new RSS.

The RSS:

- Turns customer demand from the schedule release into dates, times, and quantities which you can then use for planning and production
 - Information used to supply MRP allowing it to plan future replenishment orders
- Instructs the shipping dock what needs to be shipped
 - Information used to generate the picklist/pre-shipper

Note It is a good idea when first running this process to set Update to No. This gives you the ability to review the new schedule release prior to actually creating it.

Creating the RSS

When creating the RSS, the system first selects the active schedule release for each schedule type (e.g., sequence, shipping, planning). Then the system uses the customer requirement information from active schedule release(s) and the following information to generate the RSS:

- Sequence scheduled order data (e.g., Week Offset, Cumulative, Transport Days, Req Sched Days, Weeks, Months, standard pack quantity, Netting Logic, and SDP codes)
- Your calendar
- Your customer's calendar, if necessary

- System uses this to adjust dates or quantities if your customer does not schedule their requirements to coordinate with your open days, ship schedule, or shipment multiples
- QAD SE back-schedules all date adjustments

If Sequenced is set to Yes in Scheduled Order Maintenance (7.3.13), the system knows this is a sequence scheduled order and updates the RSS with sequence schedule data. When sequences are involved:

- Netting logic works differently
 - Netting logic is set up in the Netting Logic field of Scheduled Order Maintenance
- If Include Seq in Req Ship Sched is set to Yes in Scheduled Order Maintenance then the system includes the number of firm days from the sequence scheduled order
 - Defined in the Firm Days field of Scheduled Order Maintenance

Required Ship Schedule Update Report: Sequence Schedule

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Required Ship Schedule Update Report: Sequence Schedule

rcrsup.p 7.5.5 Required Ship Schedule Update Date: 02/03/00
Page: 1 Public Test Progress 91 Time: 11:38:09

Using ship-to calendar 01000036 **Sequence Schedule**

Customer Sequence Schedule- Required Quantities

Ship-From: 10000 Order: so2077 Line: 1
Ship-To: 01000036 Northwest Reliable
Item: 88-100 CASE, AUTO-UNIT UM: EA
PO Number: Release ID: 1

Schedule Date Type: Delivery Create Date: 01/28/00 10:54
Active Start: 01/28/00 Cumulative: noxx
Active End:

Summarized Quantities

Schedule Detail Data

Date	Time	Reference	Quantity
01/31/00	10:00		4.0
02/01/00	10:00		6.0ccx

QAD Proprietary CSS-PL-060

The image above shows an example of a Required Ship Schedule Update report using a sequence schedule.

Required Ship Schedule Update Report: Shipping Schedule

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Required Ship Schedule Update Report: Shipping Schedule

rcrsup.p
Page: 2

7.5.5 Required Ship Schedule Update
Public Test Progress 91

Date: 02/03/00
Time: 11:38:10

Customer Ship Schedule- Required Quantities

Line: 1

Ship-From: 10000
Ship-To: 01000036
Item: 88-100
PO Number:

Order: S02077
Northwest Reliable
CASE, AUTO-UNIT
Release ID: 1

UM: EA

Comments: no
SDP Code:
SDT Code:
Int Purpose Code:
Ext Purpose Code:
Prior Cum Req: 0.0
Prior Cum Date: 01/01/00

Create Date: 01/31/00 15:08:02
Cumulative: no
Schedule Date Type: Delivery
Active Start: 01/31/00
Active End:

Schedule Detail Data

Date	Time	Int Reference	Quantity	Q	Cmt	Rqm Det
01/28/00	10:00	d	9.0	F	no	no
01/31/00	10:00	d	2.0	F	no	no
02/01/00	10:00	d	5.0	F	no	no
02/02/00	10:00	d	6.0	F	no	no
02/03/00	10:00	d	4.0	F	no	no
02/04/00	10:00	d	9.0	F	no	no
02/07/00	10:00	d	2.0	F	no	no
02/08/00	10:00	d	5.0	F	no	no

Shipping Schedule

The image above shows an example of a Required Ship Schedule Update report using a shipping schedule.

Required Ship Schedule Update Report: Planning Schedule

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Required Ship Schedule Update Report: Planning Schedule

rcrsup.p 7.5.5 Required Ship Schedule Update Date: 02/03/00
Page: 3 Public Test Progress 91 Time: 11:38:11

Customer Plan Schedule- Required Quantities

Ship-From: 10000 Order: 002077 Line: 1
Ship-To: 01000036 Northwest Reliable
Item: 88-100 CASE, AUTO-UNIT UN: EA
PO Number: Release ID: 1

Comments: no Create Date: 01/31/00 15:06:52
SDP Code: Cumulative: no
SDT Code:
Int Purpose Code:
Ext Purpose Code: Schedule Date Type: Delivery
Prior Cum Req: 0.0 Active Start: 01/31/00
Prior Cum Date: 01/01/00 Active End:

Schedule Detail Data

Date	Time	Int Reference	Quantity	Q	Cmt	Rqm Det
01/24/00	10:00	w	20.0	F	no	no
01/31/00	10:00	w	15.0	F	no	no
02/07/00	10:00	w	25.0	F	no	no

Resource Authorization Data

Fab Qty: 0.0 Fab Start: 01/28/00 Fab End:
Raw Qty: 0.0 Raw Start: 01/28/00 Raw End:

Planning Schedule

QAD Proprietary CSS-PL-060

The image above shows an example of a Required Ship Schedule Update report using a planning schedule.

Required Ship Schedule Update Report: Netting Options Section

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Required Ship Schedule Update Report: Netting Options Section

New Section

rcrsup.p 7.5.5 Required Ship Schedule Update Date: 02/03/00
Page: 4 Public Test Progress 91 Time: 11:38:11

Netting Options
Netting Logic: 3 Use Plan & Ship schedules for Req Sched
Use Ship/Plan PCR: no

Plan Schedule Adjustment For Ship Schedule Overlap

Date	Time	Reference	Quantity	Adjustment Qty
02/07/00	10:00		25.0	-7.0
02/09/00			18.0	

Combined Schedule

Date	Time	Reference	Quantity	From
01/31/00	10:00		4.0	Seq Schedule
02/01/00	10:00		3.0	Seq Schedule
02/02/00	10:00		3.0	Ship Schedule
02/03/00	10:00		4.0	Ship Schedule
02/04/00	10:00		3.0	Ship Schedule
02/07/00	10:00		2.0	Ship Schedule
02/08/00	10:00		5.0	Ship Schedule
02/09/00	10:00		18.0	Plan Schedule

Adjustment for Weekly Plan Quantity

Schedule Used

QAD Proprietary CSS-PL-090

The image above shows an example of a report containing the new section, Netting Options.

Required Ship Schedule Update Report: RSS Schedule



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Required Ship Schedule Update Report: RSS Schedule

New RSS Schedule

rcrsup.p
Page: 6

Ship-From: 10000
Ship-To: 01000036
Item: 88-100
PO Number:

7.5.5 Required Ship Schedule Update
Public Test Progress 91

Order: 502077
Northwest Reliable
CASE,AUTO-UNIT

Release ID: 000002

Date: 02/03/00
Time: 11:38:12

Line: 1
UM: EA

Required Ship Schedule- Required Quantities

Comments: no
Prior Cum Req: 0.0
Prior Cum Date: 01/01/00
From Plan Id: 1
From Ship Id: 1

Create Date: 02/03/00 11:38:11
Cumulative: no
Active Start: 02/03/00
Active End:

Schedule Detail Data

Date	Time	Int	Reference	Quantity	Q	Cmt	Rqm Det
01/31/00	10:00	D		4.0	4	no	no
02/01/00	10:00	D		6.0	4	no	no
02/02/00	10:00	D		6.0	2	no	no
02/03/00	10:00	D		4.0	2	no	no
02/04/00	10:00	D		9.0	2	no	no
02/07/00	10:00	D		2.0	2	no	no
02/08/00	10:00	D		5.0	2	no	no
02/09/00	10:00	D		18.0	1	no	no

QAD Proprietary
CSS-PL-100

The image above shows an example of the new Required Ship Schedule.

Selective Req Ship Sched Update (7.5.6)

Selective Req Ship Sched Update

Ship-From: Order: Line:

Ship-To: UM:

Item Number:

PO Number:

Customer Ref:

Model Year:

Ship Schedule Release ID:

Plan Schedule Release ID:

Sequence Schedule Release ID:

Report: ☐

Update: ☐ **Leave unchecked to Preview Changes**

Output:

Back Next

Selective Req Ship Sched Update (7.5.6)

QAD Proprietary CSS-PL-110

Use Selective Req Ship Sched Update to determine the sequence schedule requirements using a specific release.

- You do not necessarily have to use the active release
- System uses the sequence schedule release ID to select the sequence schedule
 - Only sequence lines associated with the specified schedule order lines are used

The method for calculating the RSS is the same as used in Required Ship Schedule Update.

Exercise: Required Ship Schedule Update

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

The required ship schedule function identifies what needs to be shipped and when. In this exercise you are going to see the results of the Netting Logic used when setting up the scheduled order.

Use Required Ship Schedule Update (7.5.5) To run a preview of the required ship schedule by enter the following:

Field	Data
Ship-To:	f001
To	f001
Report Detail/Summary:	Detail
Update:	No

- 3 Use the following information to verify all of the required ship schedules are correct, based on the Netting Logic.

Line 1:

Field	Data
M-W	Requirements from sequence schedule
Th-F	Requirements from sequence schedule
Week 2+:	Requirements from sequence schedule

Line2:

Field	Data
M-W	Requirements from sequence schedule
Th	Adjustment from weekly planning schedule
Week 2+:	Requirements from sequence schedule

Line 3:

Field	Data
M-W	Requirements from sequence schedule
Th-F	Requirements from sequence schedule
M-W	Requirements from sequence schedule
Th	Adjustment from weekly planning schedule
Week 3+	Requirements from sequence schedule

Line 4.

Field	Data
M-W	Requirements from sequence schedule
Th-F	Requirements from sequence schedule
F	Adjustment from weekly planning schedule if planning requirements NOT consumed
M-W	Requirements from sequence schedule

W	Adjustment from weekly planning schedule if planning requirements NOT consumed
Week 3+	Requirements from sequence schedule

Line 5:

Field	Data
M-F	Requirements from sequence schedule
M-W	Requirements from sequence schedule
Th-F	Requirements from shipping schedule
Week 3+	Requirements from sequence schedule

Note The weekly intervals of the planning schedule of Line 5 are distributed according to the SDP before the requirements are combined.

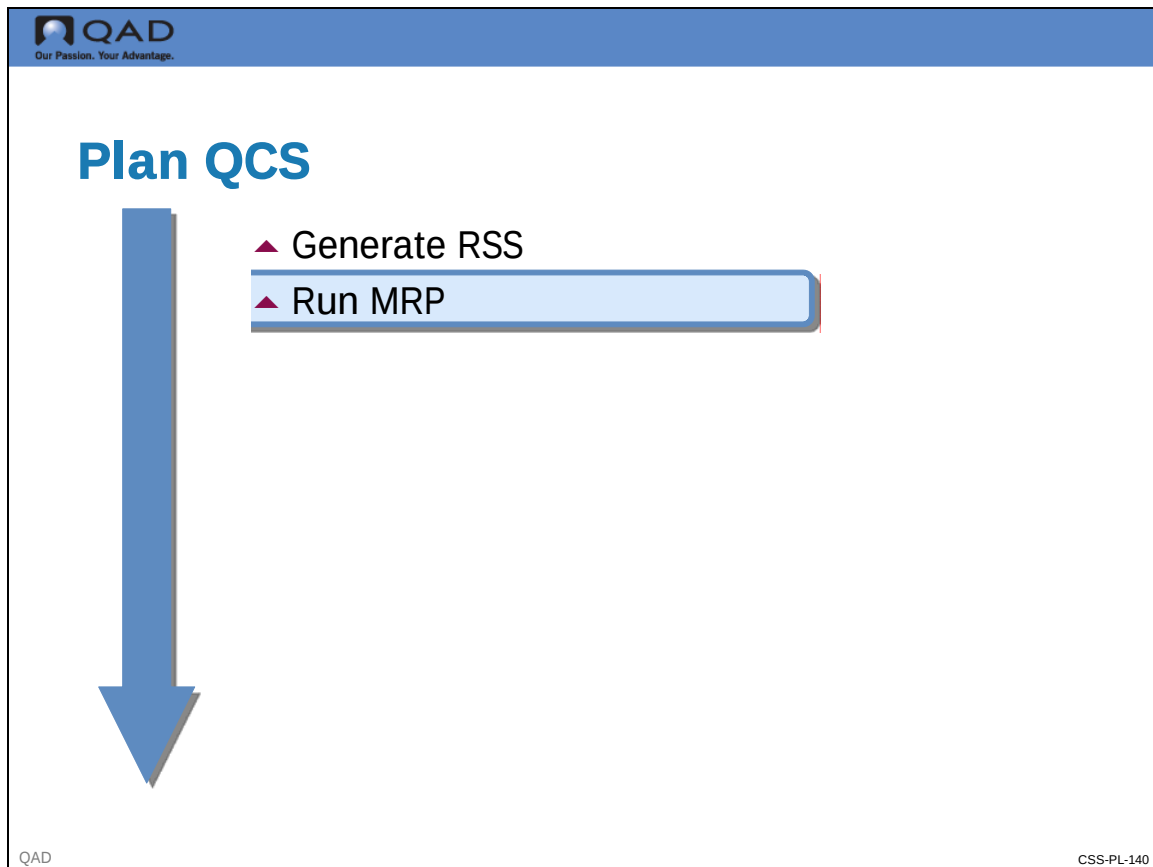
4 To generate the RSS, enter the following:

Use Required Ship Schedule Update (7.5.5)

Field	Data
Ship-To:	f001
To	f001
Report Detail/Summary:	Detail
Update:	Yes

Note If the output report from the Required Ship Schedule Update fails to display check the result with Required Ship Schedule Detail Report (7.5.14).

Run MRP



Once you have the new RSS, you are ready to run MRP. Running MRP determines the planning requirements for the customer's demands.

Note MRP only looks at the active RSS.

QAD SE offer you three ways to run MRP.

- Net Change Materials Plan (23.1)
 - Calculates requirements only for those items that have changed since the last update
 - Many companies use this option for their normal MRP runs
- Regenerate Materials Plan (23.2)
 - Generates a plan for all items, not just those that have changed since the last run
 - Recalculates demand and plans supply for all items in the site
- Selective Materials Update (23.3)
 - Updates only the items and sites you select

MRP - Calculating Requirements



MRP – Calculating Requirements

- ▲ Net Change Materials Plan (23.1)
- ▲ Regenerate Materials Plan (23.2)
- ▲ Selective Materials Plan (23.3)

MRP Detail Inquiry (23.16)

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MRP Detail Inquiry

MRP Detail Inquiry X

Go To Actions Copy Print Preview

Item Number: 02-0005 Site: 100 Start Date: 12/29/2008

MECHANICAL PENCIL (5MM) BLISTER PACKED Output: page

Back Next

MRP Detail Inquiry (23.16)

QAD Proprietary CSS-PL-160

Use MRP Detail Inquiry to see a detailed look at MRP for specified date buckets.

Selection Criteria

Item Number/Site/Start Date

Use one or more of the above criteria to select MRP detail information. To select all, leave the field blank.

MRP Detail Inquiry: Display


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MRP Detail Inquiry: Display

MRP Detail Inquiry - 12/29/200... X



MRP Detail Inquiry

12/29/08

Item Number: 02-0005 Site: 100 Start Date: 12/29/08
MECHANICAL PENCIL (5MM) BLISTER PACKED Output: page

Item Number: 02-0005 Qty on Hand: 0.0 Site: 100
MECHANICAL PENCIL (5MM) BLISTER PACKED UM: EA Pur/Mfg:

Buyer/Planner: Ord Pol: POQ Min Order: 0 Mfg LT: 0
Mstr Sched: Yes Order Period: 7 Max Order: 0 Pur LT: 0
MRP Required: Yes Time Fence: 0 Ord Mult: 0 Ins LT: 0
Plan Orders: Yes Safety Time: 0 Order Qty: 0 Inspect: No
Issue Policy: Yes Safety Stock: 0 Yield%: 100.00% Cum LT: 0

Due Date	Gross Reqs	Sched Rcpt	Proj QOH	Plan Ords	Details
12/29/08			0		Beginning Available

List complete

23.16
MRP Detail Inquiry
mrmpiq01.p

QAD Proprietary

CSS-PL-170

Using your selection criteria, the system shows you the order information from the RSS.

Plan QCS Summary



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Plan QCS Summary



- ▲ Generate RSS
- ▲ Run MRP

QAD

CSS-PL-180

Chapter 6

Shipping

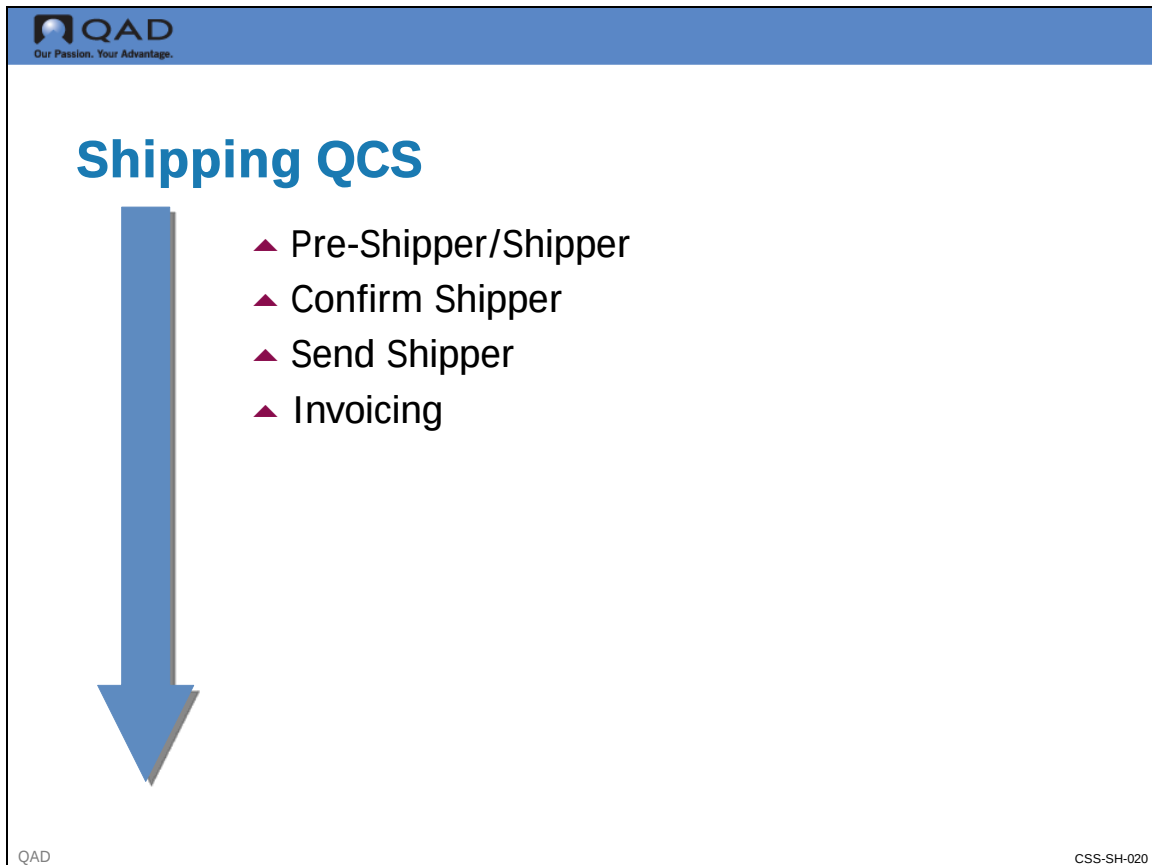


Shipping QCS

In this section you learn how to:

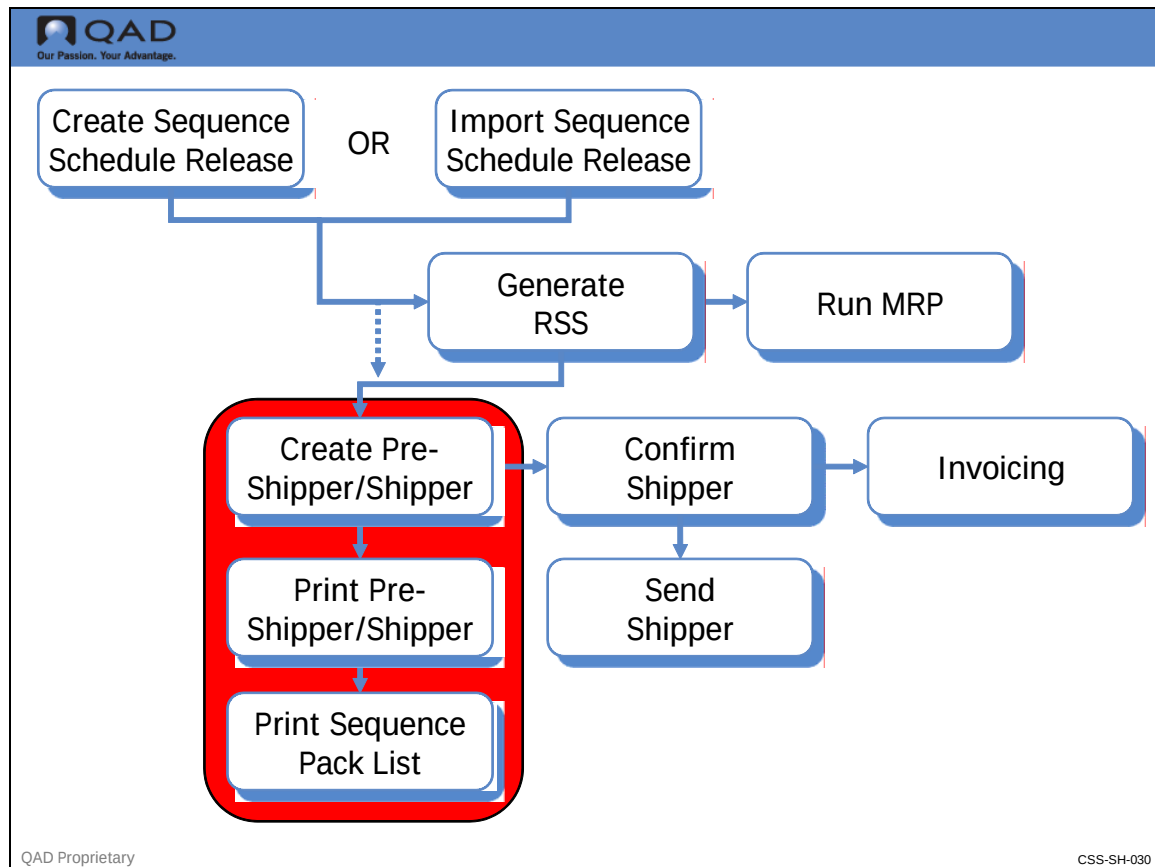
- ▲ Identify key business considerations before setting up QCS in QAD Standard Edition
- ▲ Set up QCS in QAD Standard Edition
- ▲ Loading QCS in QAD Standard Edition
- ▲ Planning QCS in QAD Standard Edition
- ▲ Shipping QCS in QAD Standard Edition
- ▲ QCS Features and Options

Shipping QCS



This illustration is a suggested setup sequence of master files for the QCS module which is based on information that flows from one master file to another and prerequisites that need to be accomplished before setting up a file.

Create Pre-Shipper/Shipper



The first step in the shipping process is to create a pre-shipper/shipper. The system uses the pre-shipper/shipper to select and ship inventory. (QAD SE converts pre-shippers to shippers before shipping.) Use one of the following to create the pre-shipper/shipper:

- Picklist/Pre-Shipper - Automatic (7.9.1)
 - Creates pre-shippers for both sequenced and non-sequenced schedules
- Sequence Pre-Shipper - Automatic (7.5.4.10)
 - Creates pre-shippers for sequenced schedules
- Shipper Gateway (7.9.22)
 - Creates shippers for external systems using an ASCII file

The terms picklist and pre-shipper are synonymous. A pre-shipper describes which items and/or containers need to be picked for the shipment.

Shipping QCS



Shipping QCS



- ▲ Pre-Shipper/ Shipper
- ▲ Confirm Shipper
- ▲ Send Shipper
- ▲ Invoicing

QAD

CSS-SH-040

Sequence Pre- Shipper - Automatic (7.5.4.10)

Sequence Pre-Shipper Automatic

Sequence Pre-Shipper - Auto...

Go To Actions Copy Print Preview

Due Date: [] To: []

Ship-To: [] To: []

Site: [] To: []

Customer Job: [] To: []

Customer Sequence: [] To: []

Customer Reference: [] To: []

Customer Dock: [] To: []

Line Feed: [] To: []

Status: [] To: []

Auto Allocation: ☐

Stage Open Quantities: ☐

Override Partial OK Flag: ☐

Use Containers: ☐

Break on Maximum Sequence: 0

Update: ☒

Form Code: 1

Break on Maximum Weight: 0.00

Break on Maximum Volume: 0.00

Include Packing List Comments: ☐

Print Only Lines to Pick: ☒

Print Features and Options: ☐

Print Packing List Comments: ☐

Create Pre-Shipper in SO UM: ☒

Output: []

Batch ID: []

Back Next

Sequence Pre-Shipper Automatic (7.5.4.10)

QAD Proprietary CSS-SH-050

Use Sequence Pre-Shipper - Automatic to create a pre-shipper for sequence schedules.

- Can be for one or a range of sequence schedules
- Only applies to sequence schedules
 - Use Picklist/Pre-Shipper - Automatic 7.9.1 to create pre-shippers for non-sequenced and sequenced schedules
- Only selects unpicked sequences from active schedules
 - Selected sequences cannot be marked as deleted, picked, or cross-referenced
- Contains sequence specific criteria
 - Job
 - Sequence
 - Dock
 - Line Feed
 - Status
 - Break on Max Sequence (e.g., truck can hold so many items)

Note You can also use Pre-Shipper/Shipper Print (7.9.4) to print the Picklist/Pre-Shipper report.

Picklist/Pre-Shipper: Sample Report

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Picklist / Pre-Shipper: Sample Report

Ship To: 01000036
Northwest Reliable
1000 B Street
Coos Bay
United States of America

P I C K L I S T / P R E - S H I P P E R
Pre-Shipper: P00000288
Page: 1
Print Date: 02/01/00

Customer Dock:
Line Feed:

Sales Order: so2077 Order Date: Ship To PO:

Ln	Item Number	Site T Location	Lot/Serial Ref	Qty Open Qty to Ship	Open UM	Due Shipped
1	88-100 Revision: AA CASE, AUTO-UNIT	10000				
			1R1234XYZ001	1.0	EA	01/28/00
			1R1234XYZ002	1.0	EA	01/28/00
			1R1234XYZ003	1.0	EA	01/28/00
			1R1234XYZ004	1.0	EA	01/28/00
			1R1234XYZ005	1.0	EA	01/28/00
		100		5.0	()	

PO Nbr:

QAD Proprietary CSS-SH-060

The above shows an example of the first page of the Picklist/Pre-Shipper.

Sequence Pack List: Sample Report

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Sequence Pack List: Sample Report

Ship To: 01000036
Northwest Reliable
1000 B Street
United States of America

PICKLIST / PRE-SHIPPER
SEQUENCE PACK LIST
Pre-Shipper: P00000288
Page: 2

Print Date: 02/01/00

Packing Order: forward
Sequences Per Container: 0

Customer Dock:
Line Feed:

Customer Job
Pack Customer Sequence
Seq Customer Reference

	Item Number	Quantity UM Status
1 20000128 001 1R1234XYZ001	88-100	1.0 EA
2 20000128 002 1R1234XYZ002	88-100	1.0 EA
3 20000128 003 1R1234XYZ003	88-100	1.0 EA
4 20000128 004 1R1234XYZ004	88-100	1.0 EA
5 20000128 005 1R1234XYZ005	88-100	1.0 EA

Sequence

Second Page of Pre-Shipper

QAD Proprietary CSS-SH-070

If the scheduled order contains sequences, the Sequence Pack List prints after the pre-shipper. It contains:

- Instructions for dock personnel
- Sequential order of every item in the shipment
 - Forward or Reverse (i.e., reverse load packing)

Picklist/Pre-Shipper - Automatic (7.9.1)

Picklist/Pre-Shipper - Automatic

Go To Actions Copy Print

Selection Criteria

Due Date: [] : []

Sales Order: [] To: []

Ship-To: [] To: []

Language ID: [] To: []

Site: [] To: []

Address List Type: [] To: []

Item Number: [] To: []

Reference: [] To: []

Creation and Print Options

Auto Allocation: ☐

Allocate Components: ☐

Ship Avail Qty for Kit: ☐

Stage Open Quantities: ☐

Override Partial OK Flag: ☐

Use Containers: ☐

Break on Sales Order: ☐

Update: ☒

Break on Maximum Weight: [0.00]

Break on Maximum Volume: [0.00]

Include Packing List Comments: ☐

Print Only Lines to Pick: ☒

Print Features and Options: ☐

Print Packing List Comments: ☐

Create Pre-Shipper in SO UM: ☒

Form Code: [1]

Output: []

Batch ID: []

Back Next

Picklist/Pre-Shipper – Automatic (7.9.1)

QAD Proprietary

CSS-SH-09

Use Picklist/Pre-Shipper - Automatic to generate a pre-shipper for sequenced and non-sequenced scheduled orders.

- Recognizes sequenced items
- Reads sequence schedule for the requirements
- Creates separate pre-shippers for sequence items and non-sequenced items by Ship-To

Shipper Gateway (7.9.22)

The screenshot shows the 'Shipper Gateway' application window. The title bar reads 'Shipper Gateway'. Below the title bar is a menu bar with 'Go To', 'Actions', 'Copy', 'Print', and 'Preview'. The main area contains a 'Process/File:' dropdown menu set to 'File', a 'File Name:' text input field, a 'Load Multiple Containers:' checkbox, a 'Verify Only:' checkbox, and an 'Output:' label. At the bottom right are 'Back' and 'Next' buttons. The QAD logo and tagline 'Our Passion. Your Advantage.' are in the top left corner. The text 'Shipper Gateway (7.9.22)' is centered at the bottom. The footer contains 'QAD Proprietary' on the left and 'CSS-SH-090' on the right.

Use Shipper Gateway to build shippers containing sequences.

- Uses an external ASCII file in the designated format to create shippers
- Accepts status codes

You have the option of including sequence values (from customer) or having the system select available sequences.

Shipper Gateway: Sample Report



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Shipper Gateway: Sample Report

rcshgw.p 99
Page: 1

7.9.22 Shipper Gateway
Your Name Here

Date: 02/01/00
Time: 17:22:39

Type: s	Site:	Location:
Ship From: 17500	Number: ESHP000	
Part:	Lot/Serial:	Reference:
Qty: 0	Ship To: 001	Order:
.....		
Kanban:		

Shipper created ESHP000.

Type: i	Site: 17500	Location:
Ship From: 17500	Number:	
Part: item y	Lot/Serial:	Reference:
Qty: 10	Ship To:	Order: so10063
Line: 1	Parent: sESHP000	
Customer PO: po100	Qty UM: EA	Ship Weight: 0
Weight UM:	Volume: 0	Volume UM:
Net Weight: 0	Ship Via:	Fob:
Carrier Ref:	Trans Mode:	Tare Weight:
Vehicle Ref: vin100		
Customer Job: job1		
Customer Seq: seq1		
Customer Doc: dock1		
Line Feed: line1		
Kanban:		

Item added to shipper item y.

Sequence Data

Shipper Gateway: Sample Report (7.9.22)

QAD Proprietary

CSS-SH-100

The above graphic shows an example of a Shipper Gateway report containing sequence information.

Pre-Shipper/Shipper Workbench (7.9.2)

Pre-Shipper / Shipper Workbench

Pre-Shipper/Shipper Workbench

Go To Actions Copy Print Preview

Ship-From ID: 1000

Pre-Shipper/Shipper: Shipper

Number:

Ship-To/Dock: 00010006

Shipping Group:

Inventory Movement Code:

Leave blank to have system assign number

Back Next

Pre-Shipper/Shipper Workbench (7.9.2)

QAD Proprietary CSS-SH-110

Use Pre-Shipper/Shipper Workbench for the manual maintenance of pre-shippers or shippers.

- Add, view, or delete sequences
 - Validates number of sequences on pre-shipper or shipper

Header Frame

In the header frame you identify the pre-shipper or shipper that you want to see. You do this by specifying:

- Ship-From
- Pre-shipper/shipper number, if existing
- Ship-To

Carrier Detail Frame

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Pre-Shipper/Shipper Workbench: Carrier Detail Frame

Pre-Shipper/Shipper Workbench

Go To Actions Copy Print Preview

Ship-From ID: 1000 Main Site
Pre-Shipper/Shipper: Shipper
Number: 00000127

Ship-To/Dock: 00010006 Customer
1212 Customer St

Shipping Group:
Inventory Movement Code:

Carrier: TOL01 Multi: ☐ **Set to Yes if there is more than one carrier**

Ship Via: GROUND

FOB Point:

Mode of Transport:

Carrier Shipment Ref: 00000127

Vehicle ID:

Document Format: 01

Consolidate Ship: optional

Language: us

Merge Other Pre-Shippers: ☐

Comments: ☐

Back Next

Pre-Shipper/Shipper Workbench (7.9.2)

QAD Proprietary CSS-SH-120

Use the Carrier Detail frame to enter carrier data for this shipment (Ship Via, FOB Point, Mode of Transport).

Shipper Workbench Frame

The screenshot shows the 'Pre-Shipper/Shipper Workbench' window. At the top, there's a QAD logo and the tagline 'Our Passion. Your Advantage.'. Below this is a title bar with 'Pre-Shipper/Shipper Workbench' and a close button. A menu bar contains 'Go To', 'Actions', 'Copy', 'Print', and 'Preview'. The main area is titled 'Shipper Workbench' and contains a table with columns: Level, Order, Ln, Item Number, Quantity, UM, Container, and Canc B/O. The first row shows '0' in the Level column and 'Shipper: 1000/00000127 Ship-To: 00010006' in the Order column. A blue arrow points from the '1. Select item' annotation to the '0' in the Level column. Another blue arrow points from the '2. Modify/view item information' annotation to the 'Shipper: 1000/00000127 Ship-To: 00010006' text. Below the table is a form with two columns of fields. The left column includes 'Sales Order:', 'Quantity: 1.0', 'Qty Picked: 0.0', 'Net Weight: 0.0', 'Tare Weight: 0.0', 'Gross Weight: 0.0', and 'Volume: 0.0'. The right column includes 'Line:', 'UM:', 'Order:', 'Site:', 'Loc:', 'Lot/Serial:', 'Reference:', 'Type:', 'Consume Req: [checkbox]', 'ID:', 'Description:', 'Comments: [checkbox]', and 'Cancel B/O: [checkbox]'. A blue arrow points from the '2. Modify/view item information' annotation to the 'ID:' field. At the bottom right of the form are three buttons: 'Delete', 'Back', and 'Next'. Below the form, the text 'Pre-Shipper/Shipper Workbench (7.9.2)' is displayed. At the bottom left, it says 'QAD Proprietary' and at the bottom right, 'CSS-SH-130'.

1. Select item

2. Modify/view item information

Sales Order: Line: Order: Loc:

Quantity: 1.0 UM: Site: Lot/Serial:

Qty Picked: 0.0 Reference: Type:

Net Weight: 0.0 Consume Req: ☐ ID:

Tare Weight: 0.0 Description: Cancel B/O: ☐

Gross Weight: 0.0 Comments: ☐

Volume: 0.0

Delete Back Next

Pre-Shipper/Shipper Workbench (7.9.2)

QAD Proprietary CSS-SH-130

The Shipper Workbench frame shows what items and containers are included in this shipment. The lower frame shows the shipper detail for individual items or containers.

Display Sequences Frame

Pre-Shipper/Shipper Workbench: Display Sequences Frame

Level	Order	Ln	Item Number	Quantity	UM	Container	Canc B/O
0	Pre-Shipper: 10000/SH000002 Ship-To: f001						
.1	so100	1	Part 1	2.0 EA		no	
.1	so100	2	Part 2	3.0 EA		no	
.1	so100	3	Part 3	2.0 EA		no	

Display Sequence Detail - Order Quantity: 2 EA

Customer Job: 20090615

Customer Sequence: 001

Customer Reference: 1R001

Customer Dock:

Line Feed:

Date: 6/15/2009 Time: :

Quantity: 1.0 UM: EA

Status: 9000

Customer Build Date:

Volume: 0.0

Comments: ☐

Cancel B/O: ☐

Loc: 100

Type:

ID:

pot, Red

QAD Proprietary Pre-Shipper/Shipper Workbench (7.9.2) CSS-SH-140

You can use the Display Sequences frame to:

- Track quantities on the sequence schedule
 - Shows all the sequences on the pre-shipper/shipper
 - Displays only if pre-shipper/shipper contains sequences
- Delete sequences
- Access the Add Sequences frame
- Access the Display Sequences frame

Deleting Sequences

The Display Sequences frame can be used to delete sequences.

- Move your cursor to the sequence you want to delete, then press F5 (Delete)
- System removes the sequence from the pre-shipper/shipper and marks it as an open requirement

Note Deleting the sequence in Pre-Shipper/Shipper Workbench does not delete the sequence from the database. It deletes/removes the sequence from the pre-shipper/shipper.

Adding Sequences

Pre-Shipper/Shipper Workbench: Add Sequences Frame

Level	Order Ln	Item Number	Quantity	UM	Container	Canc B/O
.1	so100 1	Part 1	2.0 EA		no	
.1	so100 2	Part 2	3.0 EA		no	
.1	so100 3	Part 3	2.0 EA		no	
.1	so100 4	Part 4	30.0 EA		no	

Add Sequences - Order Quantity: 2 EA

Customer Job:

Customer Sequence:

Customer Reference:

Customer Dock:

Line Feed:

Date: Time:

Quantity: UM:

Status:

Customer Build Date:

Volume: 0.0

Comments: ☐

Cancel B/O: ☐

Loc: 100

Type:

ID:

pot, Red

Pre-Shipper/Shipper Workbench (7.9.2)

QAD Proprietary

CSS-SH-150

The Display Sequences frame can be used to access the Add Sequences frame.

- Press the Insert key, the Add Sequences frame displays

Display Sequence Detail

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Pre-Shipper/Shipper Workbench: Display Sequence Detail Frame

Pre-Shipper/Shipper Workbench

Go To Actions Copy Print Preview

Level	Order	Ln	Item Number	Quantity	UM	Container	Canc B/O
0	Pre-Shipper: 10000/SH000002 Ship-To: f001						
.1	so100	1	Part 1	2.0 EA		no	
.1	so100	2	Part 2	3.0 EA		no	
.1	so100	3	Part 3	2.0 EA		no	

.1 Display Sequence Detail - Order Quantity: 2 EA

Customer Job: 20090615

Customer Sequence: 001

Customer Reference: 1R001

Customer Dock:

Line Feed:

Date: 6/15/2009 Time: :

Quantity: 1.0 UM: EA

Status: 9000

Customer Build Date:

Volume: 0.0 Comments: Cancel B/O:

Loc: 100

Type:

ID:

oot, Red

Pre-Shipper/Shipper Workbench (7.9.2)

QAD Proprietary CSS-SH-160

The Display Sequences frame can be used to display sequence detail.

- To see details for an individual sequence, move your cursor to the sequence and press Enter
- The Display Sequence Detail frame displays

Trailer Information Frame

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Pre-Shipper / Shipper Workbench: Trailer Information Frame

Pre-Shipper/Shipper Workbench

Go To Actions Copy Print Preview

Ship-From ID: 1000 Main Site
Pre-Shipper/Shipper: Shipper
Number: 00000128

Ship-To/Dock: 00010006 Customer
1212 Customer St

Shipping Group:
Inventory Movement Code:

Trailer Information

Status: Trailer Comments:

Cancel Date:

Delete Back Next

Pre-Shipper/Shipper Workbench (7.9.2)

QAD Proprietary CSS-SH-170

Status. Specifies if the shipper is active or cancelled.

- If blank, the shipper is active
 - Newly created shipper
- If X, the shipper is cancelled
 - You cannot cancel a confirmed shipper
 - Cancelled shippers are ignored by the system, except for deleting or archiving
- If C, the shipper is confirmed
 - Confirmed in Pre-Shipper/Shipper Confirm (7.9.5)

Print Shipper Frame

The screenshot shows the 'Pre-Shipper/Shipper Workbench' window with the 'Print Shipper' tab selected. The window has a title bar with the QAD logo and the text 'Our Passion. Your Advantage.'. Below the title bar is a menu bar with 'Go To', 'Actions', 'Copy', 'Print', and 'Preview'. The 'Print Shipper' tab contains a list of options with checkboxes and a text field:

- Include Shipper Comments: ☒
- Include Packing List Comments: ☒
- Print Features and Options: ☐
- Print Sales Order Detail: ☐
- Assign Shipper Number: ☐
- Display Quantity In SD UM: ☐
- Company Address:
- Print Lot/Serial Numbers: ☒
- Print Customer Address: ☒

Below the options is an 'Output:' label. At the bottom right of the window are three buttons: 'Delete', 'Back', and 'Next'.

Pre-Shipper/Shipper Workbench (7.9.2)

QAD Proprietary CSS-SH-180

In this frame you determine how your pre-shipper/shipper will print.

Exercise: Create Daily Pre-Shipper

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

The pre-shipper describes the items and/or containers that need to be picked for shipment.

Use Sequence Pre-Shipper - Automatic (7.5.4.10) or Picklist/Pre-Shipper - Automatic (7.9.1).

- 1 Create pre-shipper for the day by entering:

Field	Data
Due Date:	<next Monday>
To:	<next Monday>
Ship-To:	f001
To:	f001
Auto Allocation:	Yes
Update:	No

- 2 Verify the Pre-Shipper and Sequence Pack List.

Note If you receive Processing Errors stating: “INVALID SEQUENCE. SEQUENCE HAS INCORRECT DATASET.” refer to the Appendix section (Set Up Sequence Numbers) of this training guide to define the correct sequence numbers for pre-shippers and shippers.

- 3 Create pre-shipper for the day by entering:

Use Sequence Pre-Shipper - Automatic (7.5.4.10) or Picklist/Pre-Shipper - Automatic (7.9.1)

Field	Data
Due Date:	<next Monday>
To:	<next Monday>
Ship-To:	f001
To:	f001
Auto Allocation:	Yes
Update:	Yes

- 4 To generate the Sequence Schedule Report enter the following:

Use Sequence Schedule Report (7.5.4.7)

Field	Data
Ship-To:	f001
To:	f001
Details:	Yes

- 5 Verify all sequences for Monday are associated with pre-shipper number.

- 6 To check the sequence schedule enter the following:

Use Sequence Schedule Maintenance (7.5.4.5)

Field	Data
Ship-From:	10000
Ship-To:	f001
Release ID:	1

- 7 Verify all sequences picked cannot be edited.

Exercise: Change Status to Offline

You receive notification from Fjord. Vehicle 1R004 is offline due to a bad paint-job. Please do not ship the sunroof for sequence 004 until the vehicle is back online. Fjord will notify you at that time.

Use Pre-Shipper/Shipper Workbench (7.9.2)

- 1 To edit the pre-shipper enter:

Field	Data
Ship-From:	10000
Pre-Shipper/Shipper:	Pre-Shipper
Number:	<pre-shipper #>
Ship-To /Dock:	f001

- 2 Advance to the Shipper Workbench frame. Select part3. In the lower frame, reduce shipper line quantity (Quantity) and quantity picked (Qty Picked) by 1 for part3.
- 3 The system advises you the quantity has changed, and asks if you want to recalculate the weight and volume. Select Yes.
- 4 When the Display Sequences frame appears, remove the sequence for Customer Sequence 004.
- 5 Verify the Pre-Shipper and Sequence Pack List are correct by printing the Pre-Shipper.
- 6 # Edit the sequence and mark it offline:

Use Sequence Schedule Maintenance (7.5.4.5)

Field	Data
Ship-From:	10000
Ship-To:	f001
Release ID:	001

- 7 Advance to the Sequence Detail Data frame and enter:

Field	Data
Date:	<next Monday>
Customer Sequence:	003
Item Number:	part3
Customer Reference:	1R004
Status:	offline

Exercise: Change Status and Shipping Date

You receive another notification from Fjord. All of the blue vehicles have bad paint-jobs. Don't send any blue sunroofs for Monday until Fjord notifies you.

Use Pre-Shipper/Shipper Workbench (7.9.2)

- 1 Delete the pre-shipper by entering:

Use Pre-Shipper/Shipper Workbench (7.9.2)

Field	Data
Ship-From:	10000
Pre-Shipper/Shipper:	Pre-Shipper
Number:	<pre-shipper #>

- 2 Advance to the Shipper Workbench, press F5 (Delete). An options frame displays.

Use Sequence Schedule Maintenance (7.5.4.5)

Field	Data
Ship-From:	10000
Ship-To:	f001
Release ID:	1

- 3 Select 1 - Delete Pre-Shipper/Shipper.
- 4 Edit the sequence and mark it offline by entering:
- 5 Advance to the Sequence Detail Data frame and enter.

Field	Data
Date:	<next Monday>
Customer Sequence:	004
Item Number:	part3
Customer Reference:	1R008
Status:	offline

- 6 Set the next sequence offline by entering:

Field	Data
Customer Reference:	1R011
Status:	offline

- 7 Create pre-shipper for the day:

Use Picklist/Pre-Shipper - Automatic (7.9.1)

Field	Data
Due Date:	<next Monday>
To:	<next Monday>
Ship-To:	f001
To:	f001

Field	Data
Auto Allocation:	Yes
Update:	Yes

8 Verify the Pre-Shipper and Sequence Pack List.

9 Verify the offline sequences are NOT included.

Write pre-shipper number here: _____

Exercise: Print Pre-Shipper

1 Print the pre-shipper and convert to shipper.

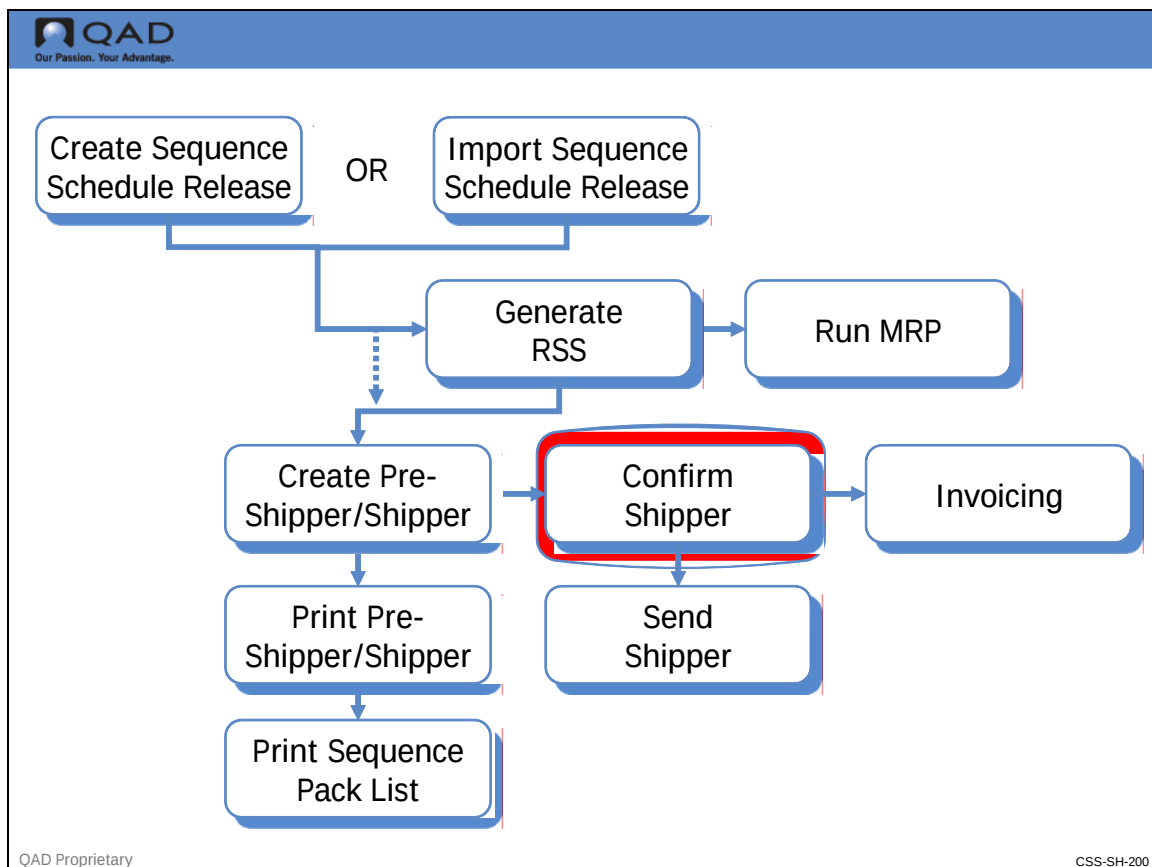
Use Pre-Shipper/Shipper Print (7.9.4), direct output to Page.

Field	Data
Number:	<pre-shipper #>
To:	<pre-shipper #>

2 Verify the shipper contains the range of sequences.

Write shipper number here: _____

Confirm Shipper



Use Pre-Shipper/Shipper Confirm (7.9.5) to confirm the pre-shipper or shipper. During the confirmation process, the system:

- Changes the pre-shipper to a shipper
- Decreases finished goods inventory
- Uses the requirement quantity to increase the cumulative shipped quantity
- Decreases the net requirement for the order line item
- Updates general ledger (GL) accounts
- Marks sequences as shipped
- Performs the first step in invoicing, creates the invoice
 - Gives you the option of posting and printing the invoice

Confirm Shipper



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Shipping QCS



- ▲ Pre-Shipper/ Shipper
- ▲ Confirm Shipper
- ▲ Send Shipper
- ▲ Invoicing

QAD

CSS-SH-210

Pre-Shipper/Shipper Confirm (7.9.5)

Pre-Shipper / Shipper Confirm

Pre-Shipper/Shipper Confirm

Go To Actions Copy Print Preview

Ship-From ID: 1000 Main Site

Pre-Shipper/Shipper: Shipper

Number: 00000126

Ship-To/Dock:

Ship Date: 12/29/2008

Effective Date: 12/29/2008

Defaults to system date

Back Next

QAD Proprietary Pre-Shipper/Shipper Confirm (7.9.5) CSS-SH-220

Use Pre-Shipper/Shipper Confirm to:

- Record the shipments
- Convert pre-shipper to shipper
 - System displays a message advising you it is converting the pre-shipper to shipper and displays the shipper number

Requirement quantities are considered open until you confirm the shipper. Once a shipper is confirmed:

- Pegged quantities are transferred to shipped quantities
- Shipped quantities are incremented by the ship line quantities
- Pegged quantities are decremented by the ship line quantities

Pre Shipper/Shipper Confirm: Invoice Options

The screenshot shows a software window titled "Pre-Shipper/Shipper Confirm" with a standard toolbar (Go To, Actions, Copy, Print, Preview). The main content area is divided into two columns. The left column contains shipping details: Ship-From ID: 1000, Pre-Shipper/Shipper: Shipper, Number: 00000126, Ship-To/Dock: 00010006, Ship Date: 12/29/2008, and Effective Date: 12/29/2008. The right column contains site and customer information: Main Site and Customer 1212 Customer St. Below these fields is a rounded rectangle containing five checked options: Print Invoice, Post Invoice, Use Shipper Nbr for Inv Nbr, Consolidate Invoices, and Calculate Freight. At the bottom right are "Back" and "Next" buttons. The window title bar includes the QAD logo and tagline "Our Passion. Your Advantage.".

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Pre-Shipper / Shipper Confirm: Invoice Options

Pre-Shipper/Shipper Confirm

Go To Actions Copy Print Preview

Ship-From ID: 1000 Main Site
Pre-Shipper/Shipper: Shipper
Number: 00000126

Ship-To/Dock: 00010006 Customer
1212 Customer St

Ship Date: 12/29/2008
Effective Date: 12/29/2008

Print Invoice: ☒
Post Invoice: ☒
Use Shipper Nbr for Inv Nbr: ☒
Consolidate Invoices: ☒
Calculate Freight: ☒

Back Next

Pre-Shipper/Shipper Confirm: Invoice Options (7.9.5)

QAD Proprietary CSS-SH-230

You use the fields in this frame to determine how the system processes the invoices generated by the shipment.

Pre-Shipper/Shipper Confirm: Print Options

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Pre-Shipper / Shipper Confirm: Print Options

Pre-Shipper/Shipper Confirm X

Go To Actions Copy Print Preview

Ship-From ID: 10000 Main Plant Site

Pre-Shipper/Shipper: Pre-Shipper

Number: SH000001

Ship-To/Dock: #001 Explorer Assembly Plant

Ship Date: 6/15/2009

Effective Date: 6/15/2009

Print Only Lines to Invoice: ☐ Invoice Date: 6/12/2009

Print Lot/Serial Numbers Shipped: ☐

Print Features and Options: ☐

Company Address: Central Form Code: 1

Discount Detail: None

Discount Summary: None

Message:

Output:

Pre-Shipper/Shipper Workbench (7.9.2)

QAD Proprietary CSS-SH-240

If you want to print the invoice, a frame displays asking for invoice printing information.

Note If printing a Brazilian Nota Fiscal, enter 11. The Invoice Number must contain a value.

Exercise: Confirm the Shipper

Use Pre-Shipper/Shipper Confirm (7.9.5)

- 1 Confirm the shipper by entering:

Field	Data
Ship-From:	10000
Pre-Shipper/Shipper:	Shipper
Number:	<shipper #>

- 2 Advance to the next frame and enter the following:

Field	Data
Post Invoice:	Yes

- 3 Choose Yes at the system prompt asking if you want to print the invoice.
- 4 Verify the invoice contains the range of sequences.

Write invoice number here: _____

Exercise: Change Status

It's now later in the day and you receive the notification from Fjord that they corrected the cars and you should send the blue sunroofs now.

- 1 Create pre-shipper for the day by entering:

Use Sequence Pre-Shipper - Automatic (7.5.4.10)

Field	Data
Due Date:	<next Monday>
To:	<next Monday>
Ship-To:	f001
To:	f001
Status:	offline
Auto Allocation:	Yes
Update:	Yes

- 2 Verify the Pre-Shipper and Sequence Pack List.
- 3 Verify the offline sequences are included.

Write pre-shipper number here: _____

- 4 Delete the pre-shipper and build it again by entering:

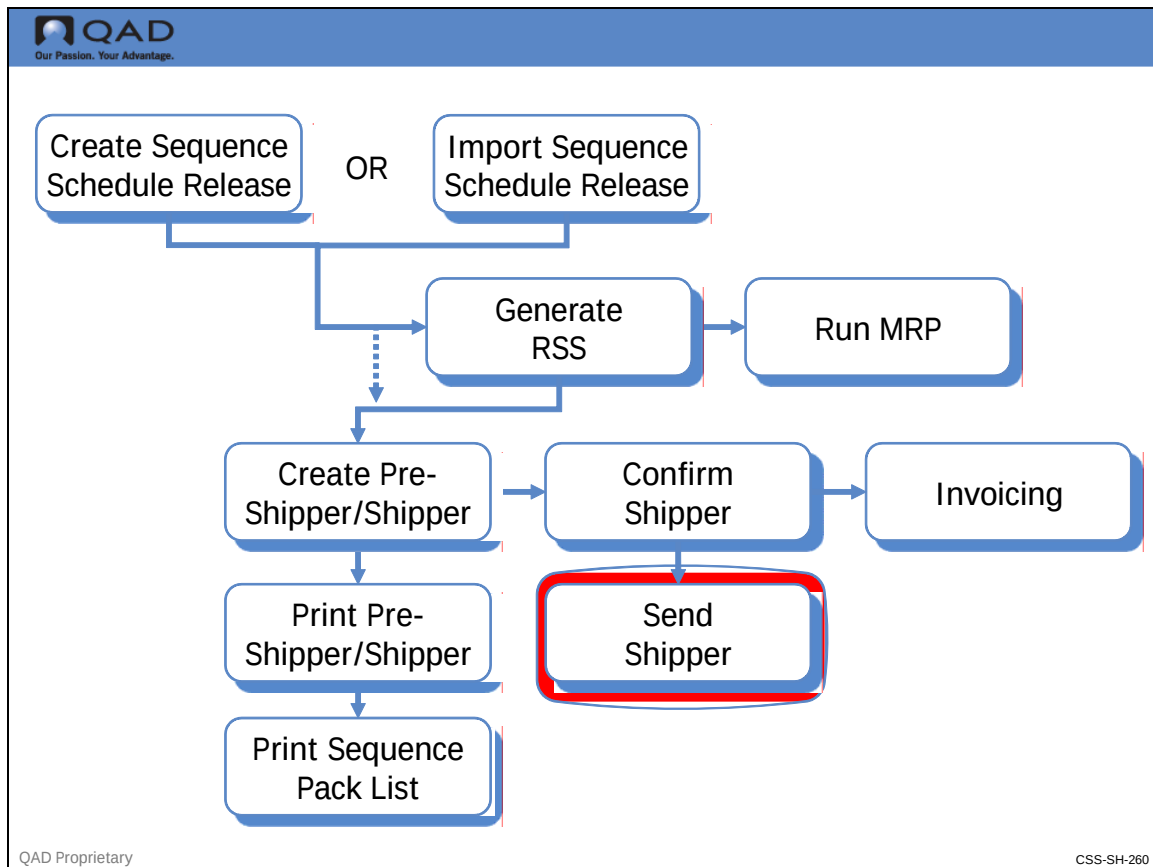
Use Pre-Shipper/Shipper Workbench (7.9.2)

Field	Data
Ship-From:	100000
Pre-Shipper/Shipper:	Pre-Shipper
Number:	<pre-shipper #>

Write pre-shipper number here:_____

Note If the output report from the Pre-Shipper/Shipper Print function fails to display check the result with Pre-Shipper/Shipper Report 7.9.6.

Send Shipper



QAD SE gives you two options to send the shipper to your customer:

- Print it and include with the shipment, like a packing list
- Electronically as an ASN when the shipment leaves your shipping area

Send Shipper



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Shipping QCS



- ▲ Pre-Shipper/ Shipper
- ▲ Confirm Shipper
- ▲ **Send Shipper**
- ▲ Invoicing

QAD

CSS-SH-270

Pre-Shipper/Shipper Print (7.9.4)

Pre-Shipper / Shipper Print

Pre-Shipper/Shipper Print X

Go To Actions Copy Print Preview

Ship-From: To:

Ship-To/Dock: To:

Number: To:

Inventory Movement Code: To:

Document Format: To:

Language: To:

Address List Type: To:

Carrier: To:

Print Pre-Shippers/Shippers: Pre-Shipper

Include Printed Pre-Shippers/Shippers:

Print Features and Options:

Assign Shipper Numbers: ☒

Shipper Sequence ID:

Include Pre-Shipper/Shipper Comments: ☒

Include Sales Order Packing List Comments: ☒

Print Sales Order Detail:

Display Quantity In SQ UM:

Company Address: Central

Print Lot/Serial Numbers:

Print Customer Address: ☒

Output:

Batch ID:

Back Next

Pre-Shipper/Shipper Print (7.9.4)

QAD Proprietary CSS-SH-280

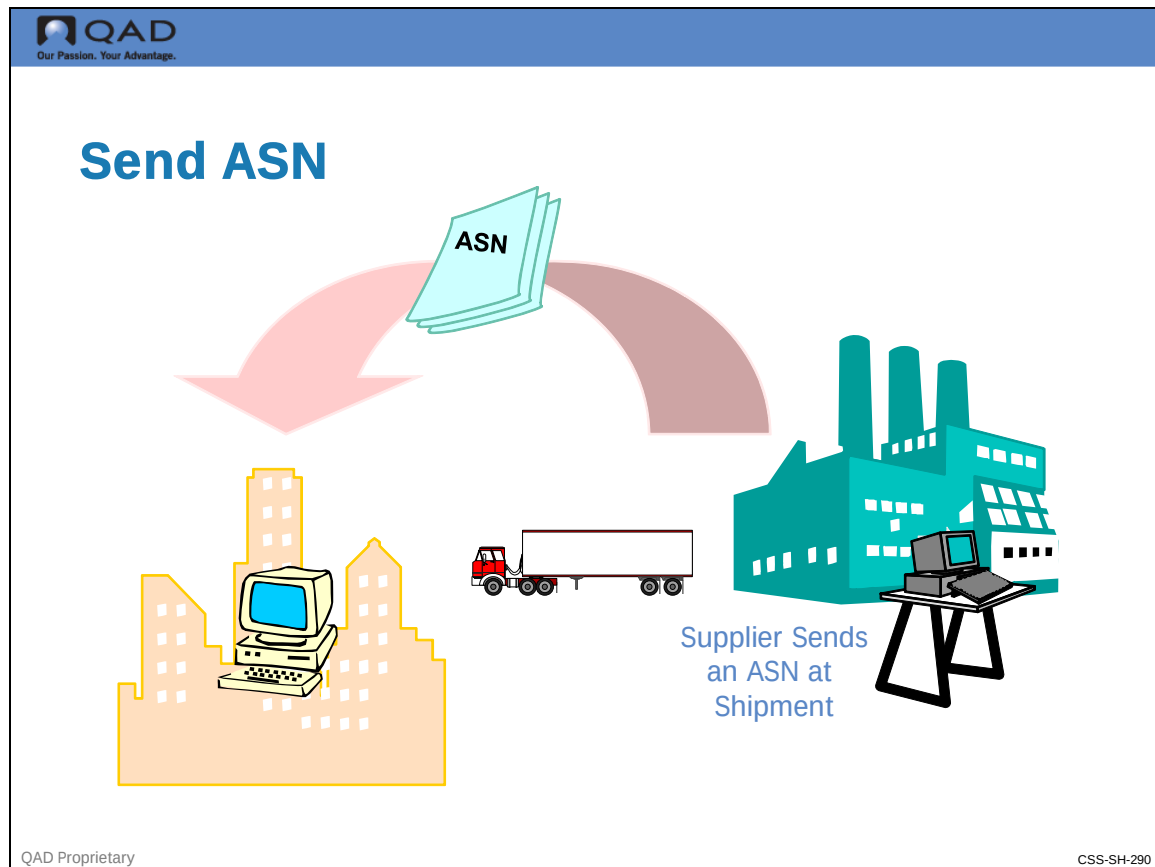
Use Pre-Shipper/Shipper Print to create and print a shipper record.

- Prints separate packing list
 - Can include sequence numbers

The system updates:

- The item quantity picked for this order
- Sequences on the shipper with the shipper number

Send ASN



An ASN is an electronic document derived from the shipper document and electronically sent (i.e., exported) by a supplier to a customer when a shipment leaves the supplier site. It informs the customer that a shipment is on the way for purposes of in-transit advice and automated receiving. The shipper number becomes the ASN number.

The ASN includes sequence information if the Send Sequences with ASN field is set to Yes in the:

- Sequence Schedule Control File (7.5.4.24), or
- Customer Controls Maintenance, (7.5.4.1), if used

The ASN is also called an 856 transaction set per the ANSI ASC X12 standard. The ASN takes the place of an invoice in some supplier-customer arrangements. You can export an ASN using EDI or eCommerce.

- ASN Export (35.5)
 - EDI

Note Whether or not an ASN is electronically transmitted using EDI to the customer depends on the setting of the EDI ASN flag in Trading Partner Parameters Maintenance (35.1). If Yes, then the ASN can be transmitted by EDI.

- Shipment ASN Export (35.21.4.1)
 - eCommerce

Shipment ASN Export (35.4.1)

Shipment ASN Export

Go To Actions Copy Print Preview

BOL:

Shipper: 00000127

Ship-From: 1000

Ship-To/Dock:

Inventory Movement Code:

Ship Date:

To:

To: 00000127

To: 1000

To:

To:

To:

Include Confirmed Shippers Only: ☒

Print Details: ☒

Update/Export/Both: Export

Print Fail/Pass/Both: Failed

EDI Batch Number:

Show Warning Messages: ☒

Output:
Batch ID:

Back Next

Shipment ASN Export (35.4.1)

QAD Proprietary CSS-SH-310

In Shipment ASN Export, enter selection criteria to indicate which shipments should have ASNs sent. The system uses these criteria to:

- Execute the appropriate gateway program
- Select the appropriate trading partner information
- Transform outbound QAD SE data to the format required by receiving party's EC subsystem

Sequence Shipper Report (7.5.4.11)

Sequence Shipper Report

Sequence Shipper Report X

Go To Actions Copy Print Preview

Ship-From: To:

Ship-To: To:

Pre-Shipper/Shipper: To:

Item Number: To:

Customer Job: To:

Customer Sequence: To:

Customer Reference: To:

Ship/Delivery Date: To:

Status: To:

Sales Order: To:

Pre-Shipper/Shipper: Pre-Shipper

Confirmed: ☐

Output:

Batch ID:

Back Next

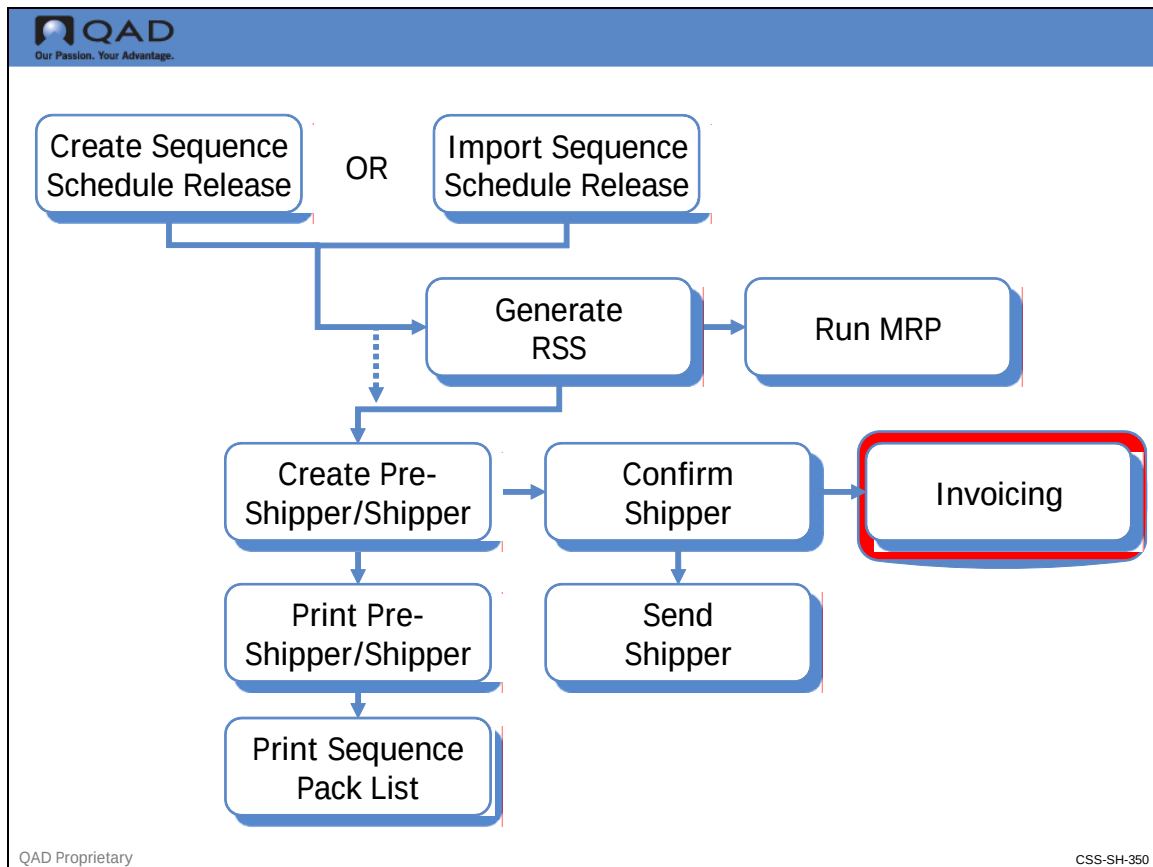
Sequence Shipper Report (7.5.4.11)

QAD Proprietary CSS-SH-330

Use Sequence Shipper Report to print a report showing sequences contained within shippers.

- Allows you to see the shipper's contents

Invoicing

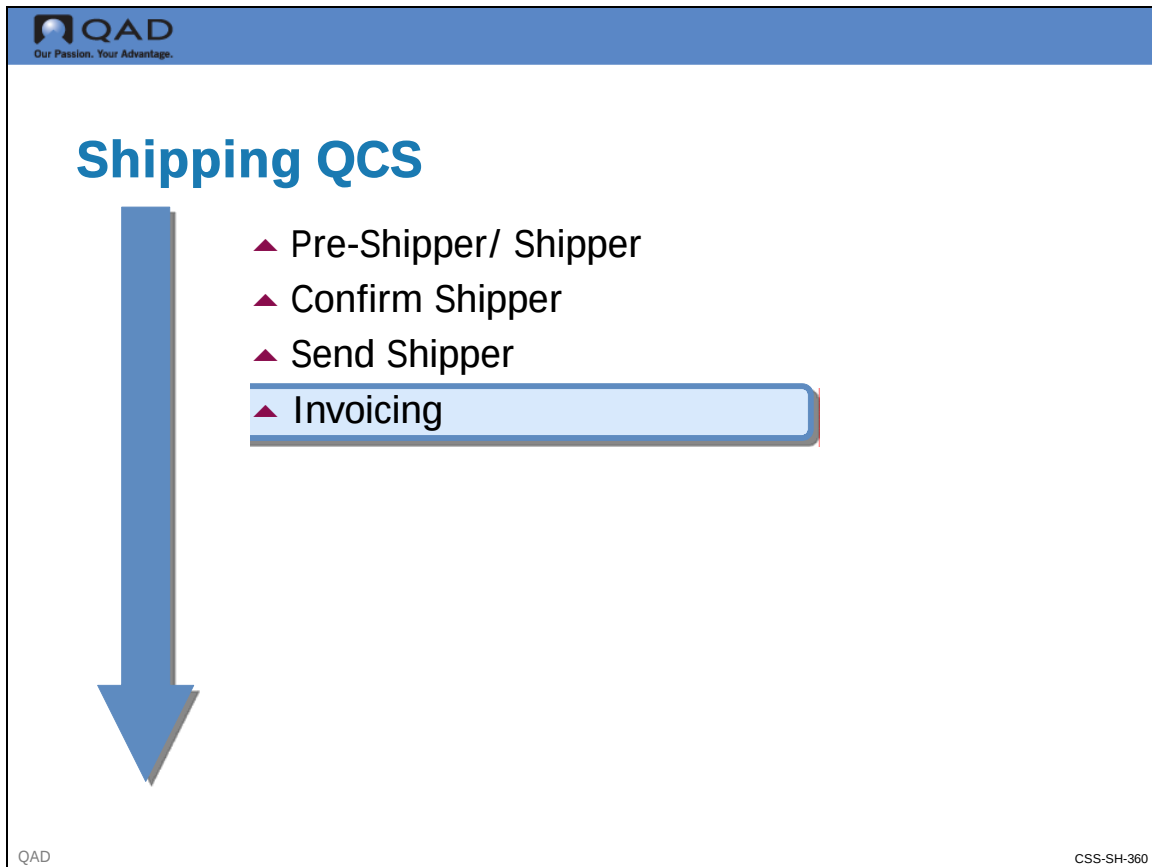


Confirming the shipper flags the order as ready for invoicing.

QAD SE gives you two options for sending the invoice your customer.

- Print an invoice and send the printed invoice to the customer
- Electronically transmit the invoice to the customer

Invoicing



Invoicing Procedure



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Invoicing Procedure

- ▲ Post Invoice
- ▲ Print Invoice
- ▲ Export Invoice

QAD Proprietary

CSS-SH-370

The typical scenario for invoicing is:

- Post invoice
 - Automatically at the time of confirmation
 - Manually using Invoice Post (7.13.4)
- Print invoice
 - At the time of confirmation
 - Manually using Invoice Print (7.13.3)
- Send invoice
 - Export
 - Manually

Shipping QCS Summary



Shipping QCS Summary



- ▲ Pre-Shipper/ Shipper
- ▲ Confirm Shipper
- ▲ Send Shipper
- ▲ Invoicing

CSS-SH-380

Chapter 7

Features and Options



QCS Features and Options

In this section you learn how to use:

- ▲ Identify key business considerations before setting up QCS in QAD Standard Edition
- ▲ Set up QCS in QAD Standard Edition
- ▲ Loading QCS in QAD Standard Edition
- ▲ Planning QCS in QAD Standard Edition
- ▲ Shipping QCS in QAD Standard Edition
- ▲ QCS Features and Options

QAD Proprietary

CSS-FE-010

In this chapter we are going to discuss different features and options available to you when using QCS.

Multi-Item Sequences


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Features and Options

- ▲ Multi-Item Sequences
- ▲ Multiple Delivery Locations
- ▲ Deleting Sequences
- ▲ Sequence Cross-Reference
- ▲ Cumulative Quantities

QAD Proprietary CSS-FE-020

QCS allows you to have multi-item sequences. Multi-item sequences simply means there is more than one item (i.e., part) per sequence.

Using the above example for seat sets in a single vehicle:

- Two red front bucket
 - Driver (D)
 - Passenger (P)
- One red rear bench

Each item is a separate sequence scheduled order line item record.

- Three sequence scheduled order line item records
- Three different item numbers (driver red bucket, passenger red bucket, and red rear seat)
- One sequence number

Multiple Delivery Locations



Features and Options

- ▲ Multi-Item Sequences
- ▲ Multiple Delivery Locations
- ▲ Deleting Sequences
- ▲ Sequence Cross-Reference
- ▲ Cumulative Quantities

Multiple Delivery Locations

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Multiple Delivery Locations

Seq	Qty	Item	VIN	Line Feed
1	1	(D) red bucket seat	ABC123	LF210
1	1	(P) red bucket seat	ABC123	LF210
1	1	red rear seat	ABC123	LF211
2	1	(D) green bucket seat	DEF435	LF210
2	1	(P) green bucket seat	DEF435	LF210
2	1	green rear seat	DEF435	LF211
3	1	blue bench seat	XYZ789	LF210
3	1	blue rear seat	XYZ789	LF211
4	1	green bench seat	AEG434	LF210
4	1	green rear seat	AEG434	LF211
5	1	(D) blue bucket seat	JWZ551	LF210
5	1	(P) blue bucket seat	JWZ551	LF210
5	1	blue rear seat	JWZ551	LF211
...				
30	1	(D) blue bucket seat	UIV331	LF210
30	1	(P) blue bucket seat	UIV331	LF210
30	1	blue rear seat	UIV331	LF211

LF210

1	1
2	2
3	3
4	4
5	5
30	30

LF211

1
2
3
4
5
30

QAD Proprietary CSS-FE-050

For each item, there can be multiple delivery locations. These are customer defined and are specified on the sequence schedule release as one of the following:

- Customer dock
- Line feed

It is important to understand the customer dock specified on the sequence schedule release is not the same as a customer dock (i.e., dock address) specified on the scheduled order Scheduled Order Maintenance (7.3.13). The dock address specified on the scheduled order is set up in Dock Maintenance (7.3.6). Then on the pre-shipper/shipper, that dock address is used as the ship-to address. The entire scheduled order is shipped to that dock address.

QCS allows the customer to specify a dock (or a line feed location) for each part (item). In QCS the purpose of specifying a customer dock (or a line feed location) is to allow a sequence to be delivered to more than one delivery location at the same customer ship-to address. A customer dock (or a line feed location) is used to direct the items once they arrive at the customer site.

Note A customer would not use a dock address (set up in Dock Maintenance) and a dock location (specified in the sequence schedule release) at the same time.

When a dock or line feed location is designated in QCS, it tells QAD SE two things:

- The sequence is made up of multiple items
- The sequence items are going to different delivery locations

- Items being shipped should not be packed together because they are going to different delivery locations at the customer site (ship-to)
- Shipper needs to be created for each delivery location, even if the ship-to address is the same for each delivery location

Note In QCS these delivery locations (i.e., dock and line feed) are strictly customer internal locations. QAD SE does not validate them.

Using the above graphic as an example, there are three items in the same sequence being shipped. System detects that the sequence contains two different line feed locations. It puts each sequence item on a shipper specific for the designated line feed.

- Driver red bucket seat and the passenger red bucket seat are to be delivered to line feed 210
 - Grouped on the same shipper
- Red rear seat is to be delivered to line feed 211
 - Separate shipper

Deleting Sequences


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Features and Options

- ▲ Multi-Item Sequences
- ▲ Multiple Delivery Locations
- ▲ Deleting Sequences
- ▲ Sequence Cross-Reference
- ▲ Cumulative Quantities

QAD Proprietary

CSS-FE-060

QAD SE gives you two options for deleting sequences:

- Logical delete
 - Use Sequence Schedule Maintenance (7.5.4.5)
 - Does not physically remove (i.e., delete) the record from the database
- Physical delete
 - Use Sequence Schedule Detail Delete (7.5.4.22)
 - Selected sequence records are physically removed from the database

You also have the option of deleting/archiving inactive sequence schedules.

- Use Schedule Delete/Archive (7.9.23)

Sequence Schedule Maintenance (7.5.4.5)

Sequence Schedule Maintenance

Sequence Schedule Maintena... X

Go To Actions Copy Print Preview

Ship-From: T12000 Electronics Division

Ship-To: 01000000 Colossal Conglomerates LTD

Release ID: Active: ☐

Create Date:

Cumulative: ☐

Packing Order: Reverse

Sequences Per Container:

Check Sequence Tolerance: ☐

Maximum Tolerance:

Schedule Date Type: Delivery

Active Start:

Active End:

Back Next

Sequence Schedule Maintenance (7.5.4.5)

QAD Proprietary CSS-FE-070

Use Sequence Schedule Maintenance to do a logical delete by setting the Delete flag to Yes.

- Marks the sequence record as deleted
- Sequence record is inactive for this schedule release
- Sequence record is not removed/deleted from the database

You can mark for deletion any sequence record that is not picked or that is cross-referenced to a picked sequence on another sequence release.

- Once marked as deleted, the sequence record is frozen and is not included in normal processing
 - Cannot be modified
 - Not copied to next release
 - Not included in planning or shipping
- Allows an audit of system
- Allows you to keep information in sync with your customer

Sequence Schedule Detail Delete (7.5.4.22)

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Sequence Schedule Detail Delete

Sequence Schedule Detail Del...
Go To Actions Copy Print Preview

Ship-From:	T40000	To:	
Ship-To:	1005000	To:	
Release ID:		To:	
Customer Job:		To:	
Customer Sequence:		To:	
Line Item Cust Ref:		To:	
Model Year:		To:	
Customer Reference:		To:	
Item Number:		To:	
Order:		To:	
PO Number:		To:	
Status:		To:	
Ship/Delivery Date:		To:	

☒ Include Deleted Only
☐ Update

Output: page
Batch ID:

Back Next

Sequence Schedule Detail Delete (7.5.4.22)

QAD Proprietary CSS-FE-080

Use Sequence Schedule Detail Delete to specify which sequence records are to be deleted.

- Selected sequence records are permanently removed from the database
- System allows you to delete any sequence record that is not picked or that is cross-referenced to a picked sequence record on another schedule release

Schedule Delete/Archive (7.5.23)

Schedule Delete / Archive

Ship-From: T40000 To:
 Sold-To: 1005000 To:
 Ship-To: To:
 Dock: To:
 Item Number: To:
 PO Number: To:
 Customer Ref: To:
 Model Year: To:
 Order: To:
 Date Created: To:
 Sort Option: 1 To:
 1 - By Ship-From,Cust,Ship-To,Order,Dock,Item,PO,Cust
 2 - By Item,Ship-From,Cust,Ship-To,Order,Dock,PO,Cust
 Include Schedule Type
 Plan: ☒
 Ship: ☐
 Required Ship: ☐
 Sequence: ☐
 Archive: ☐
 Inactive Schedule Only: ☒
 Detail Only: ☐
 Delete: ☐
 Archive File:
 Output: page
 Back Next

Schedule Delete/Archive (7.5.23)

QAD Proprietary CSS-FE-090

Use Schedule Delete/Archive to delete or archive all inactive sequence schedules with one transaction.

All associated inactive detail and cross-reference sequence records are deleted or archived.

Sequence Cross References\



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Features and Options

- ▲ Multi-Item Sequences
- ▲ Multiple Delivery Locations
- ▲ Deleting Sequences
- ▲ Sequence Cross-Reference
- ▲ Cumulative Quantities

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CSS-FE-100

You use sequence cross references to handle duplicate sequence requirements.

- Same sequence is on separate schedule releases

For example:

Day 1

- Supplier receives sequence requirement from customer
- Supplier ships sequence on day 1
 - Shipment does not reach the customer on day 1

Day 2

- Customer sends new sequence schedule release to supplier
 - Contains sequence requirement from day 1
 - Supplier shows the sequence requirement as already fulfilled

Sequence Schedule Maintenance (7.5.4.5)

Sequence Schedule Maintenance (7.5.4.5)

QAD Proprietary CSS-FE-110

In Sequence Schedule Maintenance when you are adding a new sequence schedule release for an existing ship-from/ship-to combination, the system gives you the option of copying data from the active schedule release.

- If you say Yes, the system then checks to see if there are any sequences on the active schedule release which have been flagged as picked. If there are, you are given the option of creating cross-references between the sequences on the new sequence schedule release and the active sequence schedule release
- If you say No, then the system copies all sequences from the active sequence schedule release to the new sequence schedule release
 - System resets any sequence records that were previously marked as picked or cross-referenced
 - Resetting these sequence records makes them open requirements

Sequence Cross-Ref Maintenance (7.5.4.13)

Sequence Cross-Ref Maintenance (7.5.4.13)

Use Sequence Cross-Ref Maintenance to manually create individual sequence cross-references and to maintain information on sequence cross-references.

Cross-referenced sequences can be:

- Marked as deleted
- Already cross-referenced
- Maintain information on sequence cross-references

There are three frames:

- Header Frame
- Picked/Shipped Sequence
- Linked Sequence

Header Frame

In the header frame you identify the ship-from ship-to combination on the existing sequence schedule release.

Picked/Shipped Sequence Frame

The Picked/Shipped Sequence frame shows information on picked/shipped sequences. You can use this frame to select a previously picked or shipped sequence for the specified ship-from/ship-to combination.

Linked Sequence Frame

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Sequence Cross-Ref Maintenance: Linked Sequence Frame

Sequence Cross-Ref Maintena... X

Go To Actions Copy Print Preview

Ship-From: 10000 Ship-To: f001

Picked/Shipped Sequence

Shipped Release ID: 01

Shipped Job: 20090615

Shipped Sequence: 001

Shipped Item Number: Part 1

Shipped Reference: 1R001

Shipped Dock:

Shipped Line Feed:

Scheduled Date: Scheduled Time: :

Picked: ☐ Shipped: ☐ Shipper ID:

Sequence Cross-Ref Maintenance (7.5.4.13)

QAD Proprietary CSS-FE-130

The Linked Sequence frame shows information on the linked or related sequence in the new sequence schedule release.

- System creates a cross-reference link between the picked/shipped sequence and this sequence
- The new cross-referenced sequenced (i.e., linked sequence) cannot be picked
 - System considers this sequence to be a closed requirement

Sequence Cross-Ref Report

Sequence Cross-Ref Report

Go To Actions Copy Print Preview

Ship-From: T40000 To:

Ship-To: 1005000 To:

Release ID: To:

Customer Job: To:

Customer Sequence: To:

Item Number: To:

Customer Reference: To:

Customer Dock: To:

Line Feed: To:

Date: To:

Output:

Batch ID:

Back Next

Sequence Cross-Ref Report (7.5.4.14)

QAD Proprietary CSS-FE-140

Use Sequence Cross-Ref Report to generate a report showing information on the shipped sequences and linked sequences. Shows cross-references created:

- Manually
- Automatically when sequences are imported used:
 - EDI
 - eCommerce
 - Shipper Gateway

The image above shows a sample Sequence Cross-Ref Report.

Sequence Cross-Ref Report: Sample Report



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Sequence Cross-Ref Report: Sample Report

rscsrxrp.p
Page: 1
Ship-From: 10000 nj plant
Ship-To: 866-1 Customer

7.5.4.14 Sequence Cross-Ref Report
Public Test Progress 91

Date: 02/01/00
Time: 17:01:42

Shipped Sequence	Linked Sequence
-----	-----
Shipped Release ID: 1	Release ID: 2
Shipped Job: job1	Customer Job: job1
Shipped Sequence: seq1	Customer Sequence: seq1
Shipped Item Number: 866-item1	Item Number: 866-item1
Scheduled Date: 12/07/99	Date: 12/07/99
Scheduled Time: 08:00	Time: 09:00
Shipped Reference: vin100	Customer Reference: vin400
Shipped Dock: dock1	Customer Dock: dock1
Shipped Line Feed: line1	Line Feed: line1
Picked: yes	
Shipped: yes	
Shipper ID: shp99070	

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CSS-FE-150

The image above shows a sample Sequence Cross-Ref Report.

Cumulative Quantities


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Features and Options

- ▲ Multi-Item Sequences
- ▲ Multiple Delivery Locations
- ▲ Deleting Sequences
- ▲ Sequence Cross-Reference
- ▲ Cumulative Quantities

QAD Proprietary

CSS-FE-160

Cumulative (cum) sequence schedules are rare.

- Currently found in one Ford plant
- Items are cumulative based
 - Quantities are based on the cumulative amount shipped
 - Discrete quantities are calculated

Sequence Schedule Maintenance (7.5.4.5)

Cumulative Quantities

Sequence Schedule Maintena... x

Go To Actions Copy Print Preview

Ship-From: T12000 Electronics Division
 Ship-To: 01000000 Colossal Conglomerates LTD
 Release ID:

Create Date:
 Cumulative: ☐
 Packing Order: Reverse
 Sequences Per Container:
 Check Sequence Tolerance: ☐
 Maximum Tolerance:
 Schedule Date Type: Delivery
 Active Start:
 Active End:

Cum Quantity Indicator

Sequence Detail Data

Date: 6/15/2009 Time:
 Customer Job: 20090615
 Customer Sequence: 001
 Order: so100 Line: 1 Unit of Measure: EA
 Item Number: Part 1 Sunroot, Red
 PO Number:
 Line Item Customer Ref:
 Customer Reference: 1R001 Model Year:
 Customer Dock:
 Line Feed:
 Quantity: 1.0000000000
 Customer Item: Sunroot, Red
 Customer Build Date: Status: 9000 Delete: ☐

Cum Quantity

Cum Quantity: 0.0

QAD Proprietary Sequence Schedule Maintenance (7.5.4.13) CSS-FE-170

When you set the Cumulative flag in Sequence Schedule Maintenance to Yes, it flags the sequence schedule as cumulative. The cumulative quantity for the sequence schedule is shown in the Sequence Detail Data frame, the Cum Quantity field.

Appendix A

Sequence Schedule Loaded via EDI

Sequence Schedule – Loaded via EDI

Important In an exercise if a field is not listed, you can accept the default value or leave it blank.

- 1 Use Document Import (35.13) to import the sequence schedule. Enter the following:

Field	Data
Import from File/Process:	File
Import File/Process Name:	train2 866
Report Detail/Summary:	Detail
Update:	Yes

There should be three warning messages stating that cross reference records have been created for the three blue sunroofs that were shipped previously. (If other warnings are displayed, ignore them.)

- 2 Verify the schedule with the table entries below.
- 3 Use Sequence Schedule Report (7.5.4.7) to generate the Sequence Schedule Report. Enter the following:

Field	Data
Ship-To:	f001
To:	f001
Details:	Yes
Sub-Totals:	Yes

- 4 Verify all sequences are displayed and the sub-totals are correct for each day.

Note The blue sunroofs marked as cross referenced on Release 002 and picked on Release 001.

- 5 To generate the cross reference report enter the following:

Field	Data
Ship-To:	f001
To:	f001

Use Sequence Cross-Ref Report (7.5.4.14)

- 6 Verify all sequences are displayed and the sub-totals are correct for each day.

Sequence Scheduler - Manual Entry

- 1 Create a sequence schedule by entering:

Field	Data
Ship-From:	10000
Ship-To:	f001
Release ID:	1

Use Sequence Schedule Maintenance (7.5.4.5)

- 2 Advance to the next frame and enter:

Field	Data
Cumulative:	No
Schedule Date Type:	Ship

- 3 Advance to the Sequence Detail Data frame and enter:

Field	Data
Date:	<next Monday>
Customer Job:	<Julian Date for next Tuesday> (Example: 20080306)
Customer Sequence:	001
Item Number:	part3
Customer Reference:	1R004
Quantity:	1

- 4 Advance to the Schedule Detail Data frame and enter:

Note Remember to clear the Order and Line fields with each entry. They will fill in automatically.

Date	Time	Job	Seq	Order	Line	Part	PO	Ref	Qty
Next Tuesday		<Julian Date> (Ex: 20080306)	002			part3		1R008	1
"		"	003			part3		1R011	1
"		"	004			part1		1R013	1
"		"	005			part2		1R014	1
"		"	006			part3		1R015	1
"		"	007			part1		1R016	1
"		"	008			part4		1R017	1
"		"	009			part2		1R018	1
"		"	010			part3		1R019	1
"		"	011			part4		1R020	1
Wednesday		<Julian Date> (Ex:20080307)	001			part2		1R021	1
"		"	002			part3		1R022	1
"		"	003			part2		1R023	1
"		"	004			part4		1R024	1
"		"	005			part3		1R025	1
"		"	006			part4		1R026	1

Date	Time	Job	Seq	Order	Line	Part	PO	Ref	Qty
“		“	007			part1		1R027	1
“		“	008			part4		1R028	1
“		“	009			part3		1R029	1
“		“	010			part1		1R030	1
“		“	011			part2		1R031	1
“		“	012			part1		1R032	1
Thursday		<Jullian Date (Ex: 20080308)	001			part4		1R033	1
“		“	002			part3		1R034	1
“		“	003			part2		1R035	1
“		“	004			part2		1R036	1
“		“	005			part3		1R037	1
“		“	006			part4		1R038	1
“		“	007			part1		1R039	1
“		“	008			part4		1R040	1

5 Enter Yes when the system prompts you to make this schedule active.

6 To generate the Sequence Schedule Report enter the following:

Field	Data
Ship-To:	f001
To:	f001
Sub-Totals:	Yes

Use Sequence Schedule Report (7.5.4.7)

7 Verify all sequences are displayed and the sub-totals are correct for each day.

Pre-Shipper

- 1 To create a pre-shipper for Tuesday enter:

Field	Data
Due Date:	<next Tuesday
To:	<next Tuesday
Ship-To:	f001
To:	f001
Auto Allocation:	Yes
Update:	No

Use Picklist/Pre-Shipper - Automatic (7.9.1)

- 2 Verify the blue sunroofs that are cross-referenced are not included on the pre-shipper.

Create Schedule Order - Mustang Assembly Plant

- 1 To create a scheduled order enter:

Field	Data
Ship-From:	10000
Ship-To:	f002
Order:	so101

Use Scheduled Order Maintenance (7.3.13)

- 2 Advance to the Order Data frame and enter:

Field	Data
Sequenced:	Yes

- 3 Advance to the Sequence Delivery Data frame and enter:

Field	Data
Incl Seq in Reg Ship Sched	Yes
Firm Days	0

- 4 Advance to the line item frame and enter:

Field	Data
Item:	part1
Line:	1

- 5 Advance to the second Order Line Item Data frame and enter:

Field	Data
Netting Logic:	1

- 6 Return to the line item frame and enter a second line:

Field	Data
Item:	part2
Line:	2

- 7 Advance to the second Order Line Item Data frame and enter:

Field	Data
Netting Logic:	1

- 8 Return to the line item frame and enter a third line:

Field	Data
Item:	part3
Line:	3

- 9 Advance to the second Order Line Item Data frame and enter:

Field	Data
Netting Logic:	1

- 10 Return to the line item frame and enter a fourth line:

Field	Data
Item:	part4
Line:	4

- 11 Advance to the second Order Line Item Data frame and enter:

Field	Data
Netting Logic:	1

Shipping Schedule

- 1 Create a shipping schedule by entering:

Field	Data
Order:	so101
Line:	1
Release ID:	1

Use Customer Ship Schedule Maintenance (7.5.2)

- 2 Advance to the next frame and enter:

Field	Data
Comments:	No
Prior Cum Date:	<yesterdays's date>
Schedule Date Type:	Ship

- 3 Advance to the Schedule Detail Data frame and enter:

Date	Time	Int	Ref	Qty	Q	Cmt	Rqm Det
Next Monday		D		5	F	No	No
Tuesday		D		5	F	No	No
Wednesday		D		5		No	No

- 4 Enter Yes when the system prompts you to make this schedule active.

- 5 Repeat the process, creating a shipping schedule for line 2 by entering:

Field	Data
Order:	so101
Line:	2
Release ID:	1

- 6 Advance to the next frame and enter:

Field	Data
Comments:	No
Prior Cum Date:	<yesterdays's date>
Schedule Date Type:	Ship

- 7 Advance to the Schedule Detail Data frame and enter:

Date	Time	Int	Ref	Qty	Q	Cmt	RqmDet
Next Monday		D		5	F	No	No
Tuesday		D		5	F	No	No
Wednesday		D		5	F	No	No

- 8 Enter Yes when the system prompts you to make this schedule active.

- 9 Repeat the process, creating a shipping schedule for line 3 by entering:

Field	Data
Order:	so101
Line:	3
Release ID:	1

- 10 Advance to the next frame and enter:

Field	Data
Comments:	No
Prior Cum Date:	<yesterdays's date>
Schedule Date Type:	Ship

- 11 Advance to the Schedule Detail Data frame and enter:

Date	Time	Int	Ref	Qty	Q	Cmt	RqmDet
Next Monday		D		5	F	No	No
Tuesday		D		5	F	No	No
Wednesday		D		5	F	No	No

- 12 Enter Yes when the system prompts you to make this schedule active.

- 13 Repeat the process, creating a shipping schedule for line 4 by entering:

Field	Data
Order:	so101
Line:	4
Release ID:	1

- 14 Advance to the next frame and enter:

Field	Data
Comments:	No
Prior Cum Date:	<yesterdays's date>
Schedule Date Type:	Ship

- 15 Advance to the Schedule Detail Data frame and enter:

Date	Time	Int	Ref	Qty	Q	Cmt	Rqm Det
Next Monday		D		5	F	No	No
Tuesday		D		5	F	No	No
Wednesday		D		5	F	No	No

- 16 Enter Yes when the system prompts you to make this schedule active.

Control Parameters - Mustang Assembly Plant

- 1 Set up control parameters for plant two by entering:

Field	Data
Ship-To:	f002
Include Seq in Req Ship Sched:	Yes
Firm Days:	0
Packing Order:	Reverse
Sequence Per Container:	0
Merge Schedules:	No
Check Sequence Tolerance:	Yes
Maximum Tolerance:	0
Print Sequence Range on Shipper:	Yes
Print Sequence Range on Invoice:	Yes
Send Sequence with ASN:	Yes
Send Sequence with Invoice:	Yes

Sequence Schedule - Load via EDI

- 1 To import the detail sequence schedule enter the following:

Field	Data
Import From File/Process:	File
Import File/Process Name:	train3.866
Report Detail/Summary:	Detail
Update:	No

Use Document Import (35.13)

Note There should be one warning message, and no error messages.

- 2 Verify the schedule with the table entries below.
- 3 To import the summary sequence schedule enter the following:

Field	Data
Import From File/Process:	File
Import File/Process Name:	train3.866
Report Detail/Summary:	Summary
Update:	Yes

- 4 To generate the Sequence Schedule Report enter:

Field	Data
Ship-To:	f002
To:	f002
Sub-Totals:	Yes

Use Sequence Schedule Report (7.5.4.7)

- 5 Verify all sequences are displayed and the sub-totals are correct for each day.
- 6 To generate a Sequence Schedule Report for both Fjord Plants enter:

Field	Data
Ship-To:	f001
To:	f002
Sub-Totals:	Yes

Use Sequence Schedule Report (7.5.4.7)

- 7 Verify all sequences are displayed and the sub-totals are correct for each day.

Sequence Schedule - Manual Entry

- 1 To create a sequence schedule enter:

Field	Data
Ship-From:	10000
Ship-To:	f002
Release ID:	1

Use Sequence Schedule Maintenance (7.5.4.5)

- 2 Advance to the next frame and enter:

Field	Data
Cumulative:	No
Schedule Date Type:	Ship

- 3 Advance to the Sequence Detail Data frame and enter:

Field	Data
Date:	<next Monday>
Customer Job:	Job 81
Customer Sequence:	001

- 4 Advance to the Schedule Detail Data frame and enter:

Note Remember to Clear the Order and Line fields with each entry. They will fill in automatically.

Date	Time	Job	Seq	Order	Line	Part	PO	Ref	Qty
<next Monday>		Job 81	001			part4		1M001	1
“		“	002			part2		1M002	1
“		“	003			part1		1M003	1
“		“	004			part3		1M004	1
“		“	005			part4		1M005	1
“		“	006			part1		1M006	1
“		“	007			part4		1M007	1
“		“	008			part3		1M008	1
“		“	009			part4		1M009	1
“		“	010			part2		1M010	1
“		“	011			part3		1M011	1
“		“	012			part2		1M012	1
“		Job 82	001			part1		1M013	1
“		“	002			part2		1M014	1
“		“	003			part3		1M015	1
“		“	004			part1		1M016	1
“		“	005			part4		1M017	1
“		“	006			part2		1M018	1
“		“	007			part3		1M019	1

Date	Time	Job	Seq	Order	Line	Part	PO	Ref	Qty
“		“	008			part4		1M020	1
“		job83	001			part2		1M021	1
“		“	002			part3		1M022	1
“		“	003			part2		1M023	1
“		“	004			part4		1M024	1
“		“	005			part3		1M025	1
“		“	006			part4		1M026	1
“		“	007			part1		1M027	1
“		“	008			part4		1M028	1
“		“	009			part3		1M029	1
“		“	010			part1		1M030	1
“		“	011			part2		1M031	1
“		“	012			part3		1M032	1

5 Enter Yes when the system prompts you to make this schedule active.

6 To generate a Sequence Schedule Report enter:

Field	Data
Ship-To:	f001
To:	f001
Sub-Totals:	Yes

Use Sequence Schedule Report (7.5.4.7)

7 Verify all sequences are displayed and the sub-totals are correct for each day.

Required Ship Schedule Update

- 1 To create a RSS enter:

Field	Data
Ship-To:	f002
To:	f002
Report Detail/Summary:	Detail
Update:	Yes

Use Required Ship Schedule Update (7.5.5)

Note The results do not have to be verified in detail. The following steps are dependent on the existence of the RSS.

Pre- Shipper

- 1 To create a pre-shipper for the day enter:

Field	Data
Due Date:	<blank>
To:	<blank>
Ship-To:	f002
To:	f002
Auto Allocation:	Yes
Update:	No

Use Picklist/Pre-Shipper - Automatic (7.9.1)

- 2 Verify the:

- Pre-Shipper and Sequence Pack List
- Sunroofs display in reverse order on the Sequence Pack List

- 3 Create another pre-shipper for the day and break on max weight by entering:

Field	Data
Ship-To:	f002
To:	f002
Auto Allocation:	Yes
Break on Maximum Weight:	100
<Unit of Measure>:	LB
Update:	No

Use Picklist/Pre-Shipper - Automatic (7.9.1)

- 4 Verify that two Pre-Shippers and Sequence Pack Lists are created.

- The first contains 100 lbs, or 20 sunroofs
- The second contains the remaining sunroofs

- 5 Create another pre-shipper for the day and break on max sequence:

Field	Data
Ship-To:	f002
To:	f002
Auto Allocation:	Yes
Break on Maximum Weight:	25
<Unit of Measure>:	LB
Update:	No

Use Sequence Pre-Shipper - Automatic (7.5.4.10)

- 6 Verify that two Pre-Shippers and Sequence Pack Lists are created. The first contains 25 sunroofs.

Edit Schedule

- 1 Edit the schedule to indicate that you are using containers that hold ten sunroofs:

Field	Data
Ship-From:	10000
Ship-To:	f002
Release ID:	001

Use Sequence Schedule Maintenance (7.5.4.5)

- 2 Advance to the next frame and enter:

Field	Data
Sequence Per Container:	10

- 3 Create another pre-shipper for the day by entering:

Field	Data
Ship-To:	f002
To:	f002
Auto Allocation:	Yes
Update:	No

Use Sequence Pre-Shipper - Automatic (7.5.4.10)

- 4 Verify the Sequence Pack List:
 - Contains breaks after every ten sunroofs
 - Displays a line and an area to write in the container

Appendix B

Manually Create Sequence Scheduler

Manually Create Sequence Schedule

Explorer Assembly Plant

- 1 Use Sequence Schedule Maintenance (7.5.4.5) to create a sequence schedule:

Field	Data
Ship-From:	10000
Ship-To:	f001
Release ID:	001

- 2 Advance to the next frame and enter:

Field	Data
Cumulative:	No
Schedule Date Type:	Ship

- 3 Advance to the Sequence Detail Data frame and enter:

Field	Data
Date:	<next Monday>
Customer Job:	<Julian Date for next Monday Ex. 20080305
Customer Sequence:	001
Item Number:	part1
Customer Ref:	1R001
Quantity:	1
Status:	9000

Note Use Status 9000 for all sequences.

- 4 Advance to the Schedule Detail Data frame and enter the following:

Note Remember to clear the Order and Line fields with each entry. They will fill in automatically.

Date	Time	Job	Seq	Order	Line	Part	PO	Ref	Qty
Next Monday		<Julian Date> (Ex: 20080306)	002			part2		1R008	1
“		“	003			part1		1R011	1
“		“	004			part3		1R013	1
“		“	005			part4		1R014	1
“		“	006			part1		1R015	1
“		“	007			part4		1R016	1
“		“	008			part3		1R017	1
“		“	009			part4		1R018	1
“		“	010			part2		1R019	1
“		“	011			part3		1R020	1
“		“	012			part2		1R021	1
Tuesday		<Julian Date> (Ex:20080307)	001			part1		1R022	1
“		“	002			part2		1R023	1
“		“	003			part3		1R024	1

Date	Time	Job	Seq	Order	Line	Part	PO	Ref	Qty
“		“	004			part1		1R025	1
“		“	005			part4		1R026	1
“		“	006			part2		1R027	1
“		“	007			part3		1R028	1
“		“	008			part4		1R029	1
Wednesday		<Jullian Date (Ex: 20080308)	001			part2		1R030	1
“		“	002			part3		1R031	1
“		“	003			part2		1R032	1
“		“	004			part4		1R033	1
“		“	005			part3		1R034	1
“		“	006			part4		1R035	1
“		“	007			part1		1R036	1
“		“	008			part4		1R037	1
“		“	009			part3		1R038	1
“		“	010			part1		1R039	1
“		“	011			part2		1R040	1
“		“	012			part1		1R041	1

Print Sequence Schedule Report

- 1 Use Sequence Schedule Report (7.5.4.7) to generate the Sequence Schedule Report. Enter the following:

Field	Data
Ship-To:	f001
To:	f001
Sub-Totals:	Yes

- 2 Verify all sequences are displayed and the sub-totals are correct for each day.

Appendix C

Set Up Sequence Numbers

Set Up Sequence Numbers

- 1 To set up the first sequence number code enter:

Field	Data
Sequence ID:	Ship
Target Dataset:	abs_id.shipper
Internal:	Yes

Use Number Range Management (36.2.21.1)

- 2 Advance to the Segment List frame. You are going to define the format and parameters for the first segment number by entering:

Field	Data
Nbr:	1
Type:	Fixed
New Segment Number:	1
Fixed Value:	SH

- 3 Add a second segment number by entering:

Field	Data
Nbr:	2
Type:	Int
New Segment Number:	2
Minimum Value:	0
Maximum Value:	999999
Initial Value:	1
Reset Value:	0

- 4 Add a new sequence number code by entering:

Field	Data
Sequence ID:	pre-ship
Target Dataset:	abs_id_preship
Internal:	Yes

- 5 Advance to the Segment List frame and enter:

Field	Data
Nbr:	1
Type:	Fixed
New Segment Number:	1
Fixed Value:	PRE

- 6 Add a second segment number by entering:

Field	Data
Nbr:	2
Type:	Int
New Segment Number:	2

Field	Data
Minimum Value:	0
Maximum Value:	999999
Initial Value:	1
Reset Value:	0

- 7 Add a new sequence number code by entering:

Field	Data
Sequence ID:	mbol
Target Dataset:	abs_id_mbol
Internal:	Yes

- 8 Advance to the Segment List frame and enter:

Field	Data
Nbr:	1
Type:	Fixed
New Segment Number:	1
Fixed Value:	MB

- 9 Add a second segment number by entering:

Field	Data
Nbr:	2
Type:	Int
New Segment Number:	2
Minimum Value:	0
Maximum Value:	999999
Initial Value:	1
Reset Value:	0

- 10 Update the Container/Shipper Control File to use the new sequence number codes.

Field	Data
Pre-Shipper Sequence ID:	preship
Shipper Sequence ID:	ship
Master Bill Sequence ID:	mbol

Use Container/Shipper Control File (7.9.24)

Appendix D

Design and Architecture

Design Considerations



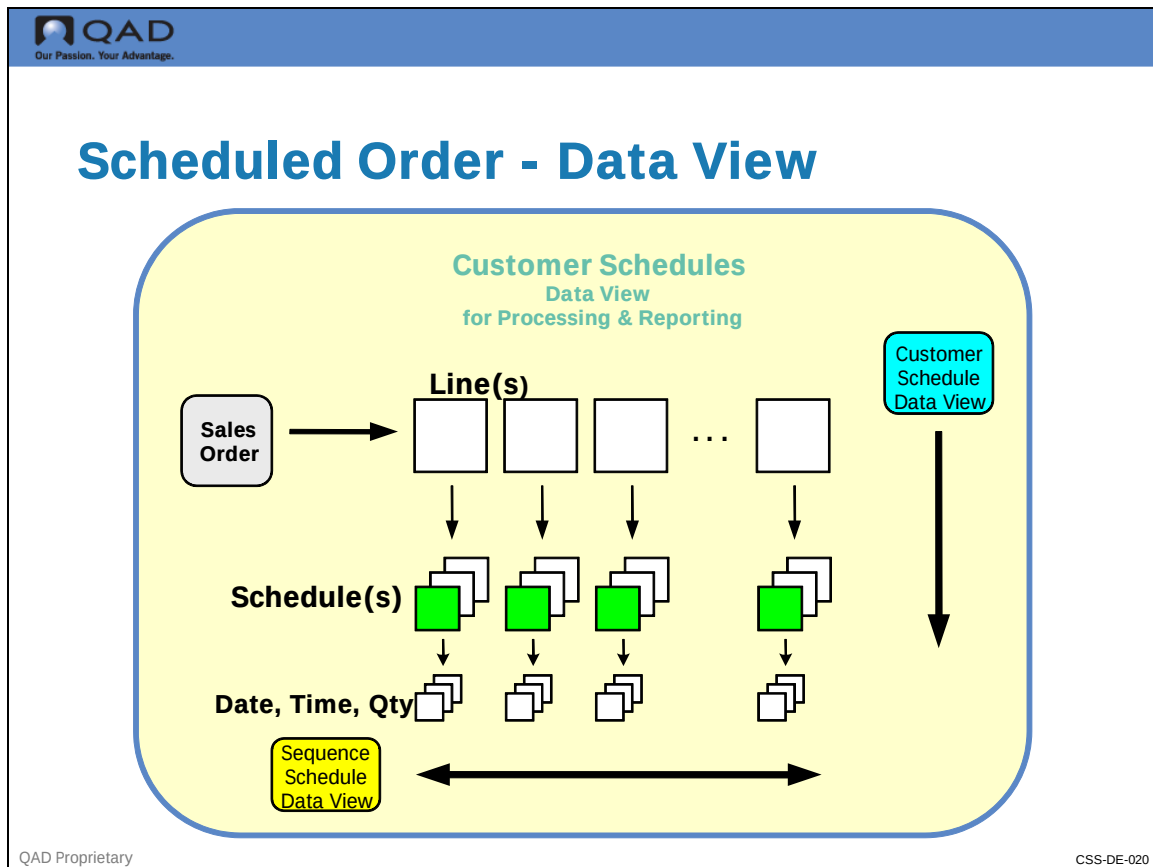
Design and Architecture

▲ Design Considerations

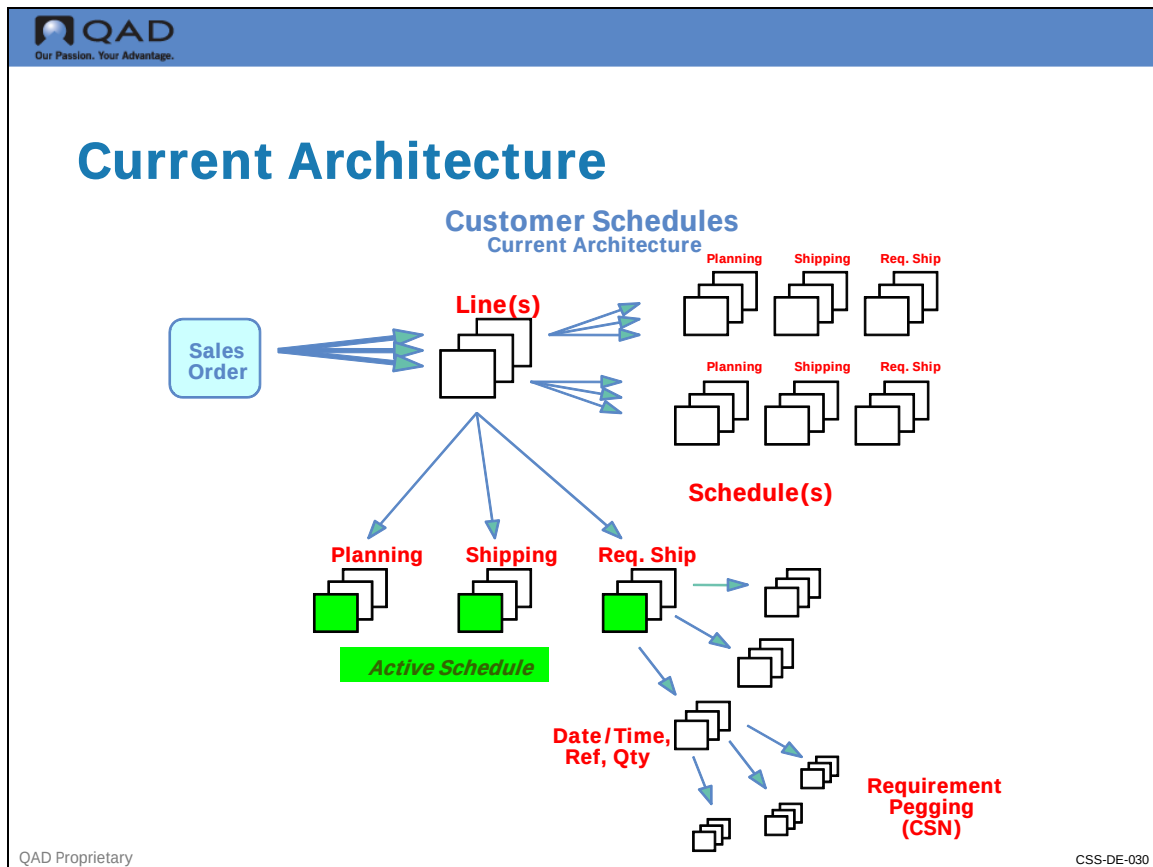
- Scheduled Order - Data View
- Current Architecture
- New Schedule Type
- Design Alternatives
- Design Requirements
- Selected Architecture
- E-R (Entity-Relationships) Diagram
- Schema Diagram

▲ Programming Considerations

Scheduled Order - Data View



Current Architecture



New Schedule Type


Our Passion. Your Advantage.

New Schedule Type

- ▲ Design Alternatives
 - Type 7
 - Type 4
- ▲ Design Requirements
 - Physical Requirements
 - New Fields
 - New Indexes

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Existing schedule types:

- Customer Planning – Type 1
- Customer Shipper – Type 2
- Customer Required Ship – Type 3
- Supplier Schedule – Type 4
- Supplier Planning – Type 5
- Supplier Shipping – Type 6

Design Alternative

New Type 7

- Creates gap between schedule types

New Type 4

- Move supplier schedules to 5, 6, and 7
- Large invasive code change

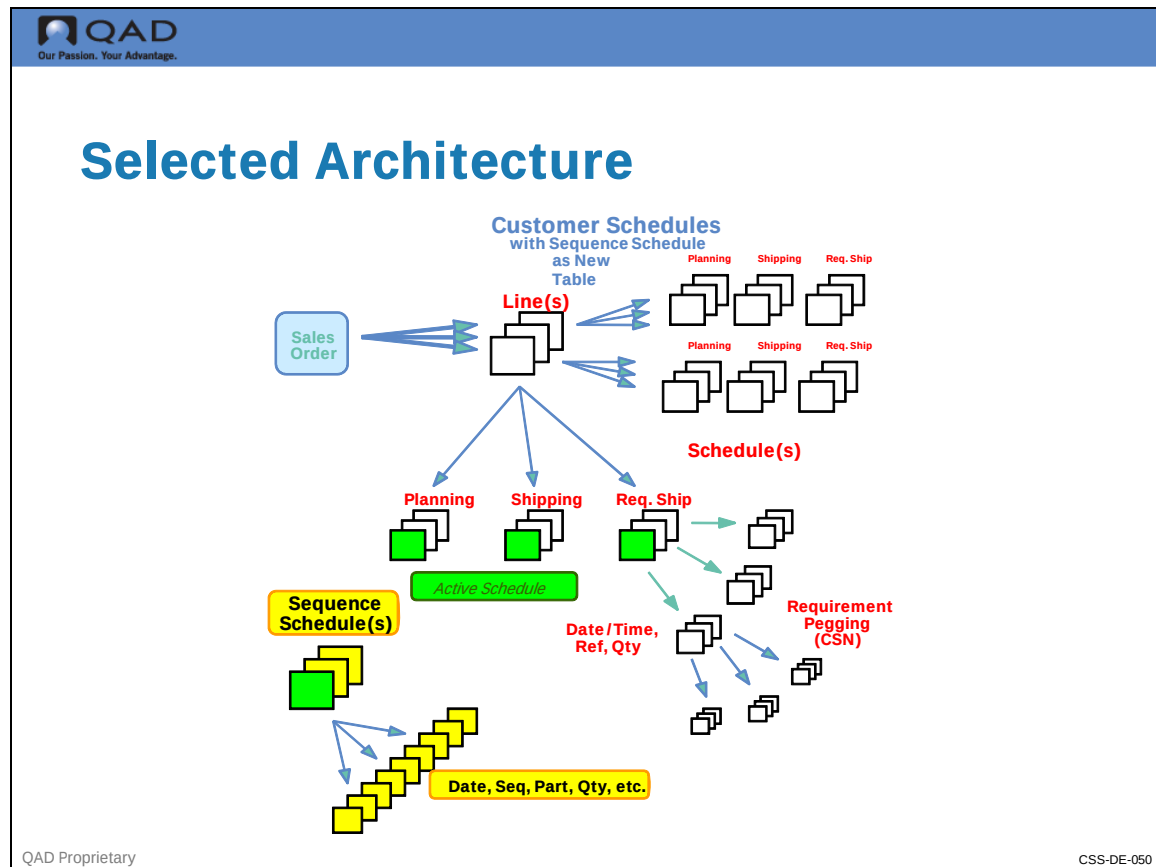
New Data Structure

Design Requirements

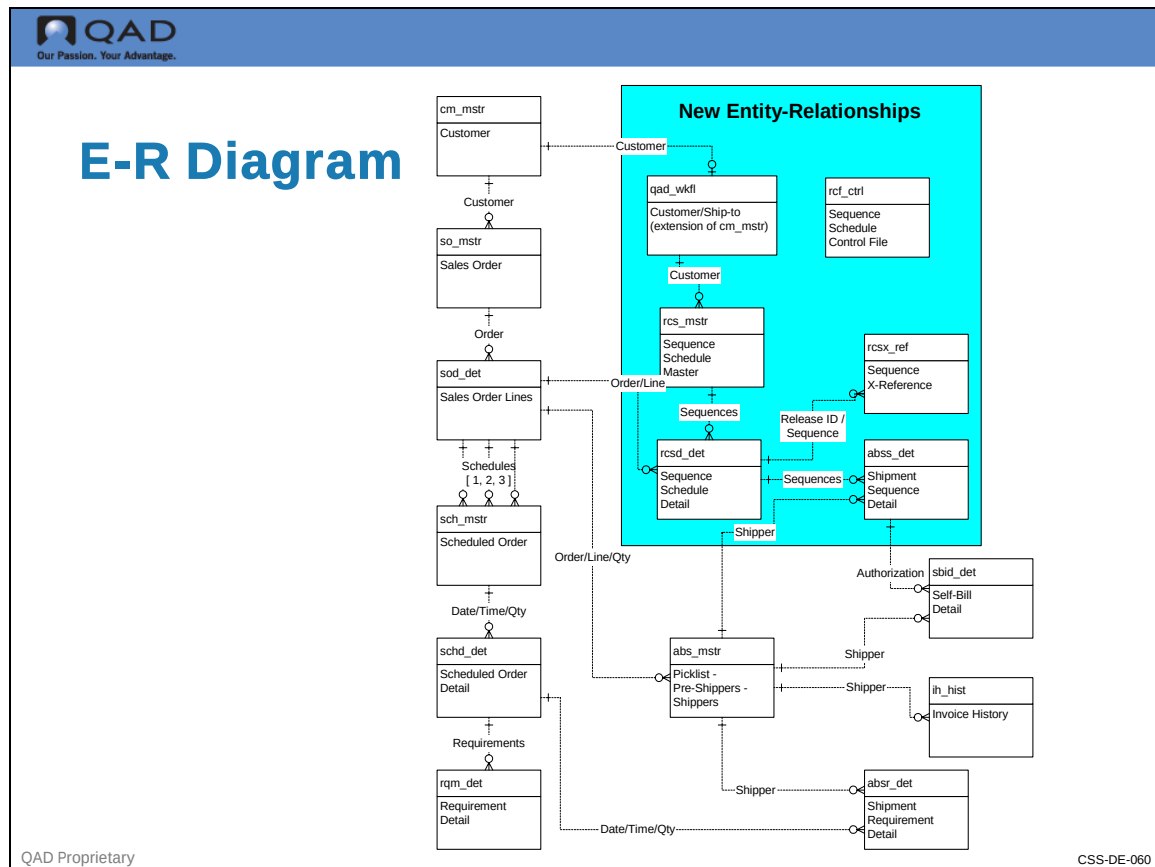
Physical requirements:

- New fields
 - Job
 - Sequence
 - Dock
 - Line Feed
- New indexes
 - By date/sequence for maintenance
 - By date/item for planning (required ship schedule [RSS])
 - By date/destination/sequence for shipping

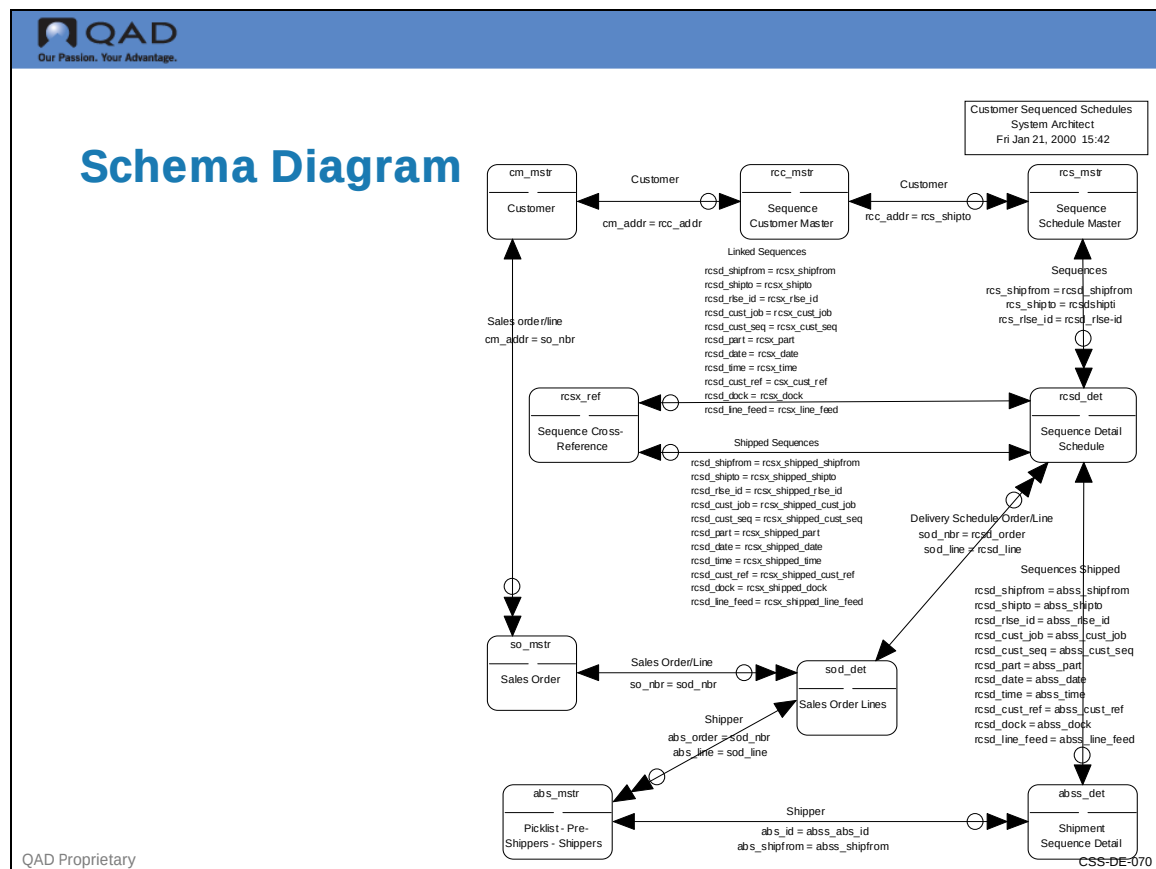
Selected Architecture



E-R Diagram



Schema Diagram



Programming Considerations



Design and Architecture

- ▲ Design Considerations
- ▲ Programming Considerations
 - Required Ship Schedule Update
 - Picklist/Pre-Shipper - Automatic
 - ECommerce

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- Required Ship Schedule Update (7.5.5)
- Picklist/Pre-Shipper - Automatic (7.9.1)
- eCommerce

Required Ship Schedule Update

Netting Logic

- Keep existing 1–4 options

New Workfile Created

- Contains sequence schedule requirements

RSS Begins with Sequence Schedule

- Replace logic
- Consume logic – updates running CUM (cumulative)

SDT (Ship/Delivery Time) Code vs. Weekly Interval Problem

- With SDT weekly requirements distributed
 - For example, 20 – (1/4 Monday through Friday)
- Without SDT weekly requirements dropped
- Ship Schedule

- 1,000 for Monday
 - 1,500 for Tuesday
- Plan Schedule
 - 10,000 for week
- RSS
 - 1,000 for Monday
 - 1,500 for Tuesday
- Now RSS
 - 7,500 for Wednesday

Required Ship Schedule Update


Our Passion. Your Advantage.

Required Ship Schedule Update

- ▲ Netting Logic
- ▲ New Workfile Created
- ▲ RSS Begins with Sequence Schedule
- ▲ SDT Code vs Weekly Interval Problem

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Netting Logic

- Keep existing 1–4 options

New Workfile Created

- Contains sequence schedule requirements

RSS Begins with Sequence Schedule

- Replace logic
- Consume logic – updates running CUM (cumulative)

SDT (Ship/Delivery Time) Code vs. Weekly Interval Problem

- With SDT weekly requirements distributed
 - For example, 20 – (1/4 Monday through Friday)
- Without SDT weekly requirements dropped
 - Ship Schedule 1,000 for Monday 1,500 for Tuesday
 - Plan Schedule 10,000 for week
 - RSS 1,000 for Monday 1,500 for Tuesday
 - Now RSS 7,500 for Wednesday

Picklist/Pre-Shipper- Automatic



Picklist / Pre-Shipper - Automatic

- ▲ Handles Sequenced and Non-Sequenced Items
- ▲ Reads Sequence Schedule
- ▲ Recalculates Pre-Shipper Quantity

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Handles sequenced and non-sequenced items:

- One transaction to create pre-shippers
- Segregates sequenced and non-sequenced items into separate pre-shippers by Ship-To
- Eliminates cloning of code
- Needs selection criteria for sequences

Reads sequence schedule:

- Open quantity
- RSS contains gross quantities
- Sequence schedule contains detail

Recalculates pre-shipper quantity:

- Existing calculation:
 - Total item quantity
- New sequence calculation:
 - Order material
 - Summarize item quantity

eCommerce



eCommerce

- ▲ Transformation Files Example
- ▲ Gateway is Part of PRO/PLUS