

MFG/PRO®

Customer Sequence Schedules

TRAINING GUIDE



70-2786A
MFG/PRO eB
Database: Train
March 2001

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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 (CSS) module of MFG/PRO. The course includes:

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

Students learn how to:

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

Who Should Attend This Course

- Implementation consultants
- Members of implementation teams
- Key users

Prerequisites

- *Initial MFG/PRO Setup* training course
- *Customer Schedules* training course
- Basic knowledge of how MFG/PRO is used in the business
- Working knowledge of the manufacturing industry in general

Note It is recommended that students unfamiliar with MFG/PRO work through the User Interface Guide before attending this class.

Approximate Length of Course

- This course is designed to be taught in one day

Topics Covered

Set Up

- Item Records
- Customer Records
- Customer Calendars
- CSS Control Files
- EDI (Electronic Data Interchange)
- EDI ECommerce
- Create Sequence Schedule Order

Loading

- Load CSS Release
- Receive Schedule Release
- Load Schedule Release
- Import Sequence Schedule Release
- Create Sequence Schedule Release
- Reviewing Schedule Release Information

Planning

- Plan CSS
- Generate RSS
- Run MRP

Shipping

- Creating Pre-Shipper/Shipper
- Confirm Shipper
- Send Shipper
- Print Shipper Report
- Invoicing

Features and Options

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

Related Courses

- Initial MFG/PRO Setup
- Customer Schedules
- Sales Order Management
- ECommerce
- Best Pricing

Certification Preparation

This course is one of several courses designed to assist students in preparing for QAD certification examinations. However, QAD does not guarantee anyone a passing grade as a result of having taken this course.

Students preparing for certification examinations should study all available materials (user guides, training guides, on-line help, for example) and acquire industry and field experience.

Using This Training Guide

Implementation consultants, members of implementation teams, and operators can use this guide in instructor-led classes, while knowledgeable consultants who want to learn about the CSS module can use this guide for self-study.

This training guide provides a road map for instruction and learning. It contains:

- Annotated PowerPoint slides for instructors
- MFG/PRO screens annotated for instructors to demonstrate the module's functionality
- References to other sections of this training guide and related training courses
- Exercises

Cross-Reference Icons

Additional Information



Directs students to another section of the current training guide



Cross-references another MFG/PRO training guide

Note Students may want to consult *User Guides* or on-line help during class, but this generally is not necessary.

Notes to Instructors

PowerPoint Slides

QAD created the slides using Microsoft® PowerPoint® 97. Instructors may want to animate text, graphics, and other objects on the slides to

- Focus on important points
- Control the flow of information
- Add interest and variety to the presentation

Clicking on *Animation Preview* on the *Slide Show* menu previews animation of text and objects. To customize slides, click on *Custom Animation* on the *Slide Show* menu.

PowerPoint Slide Icons



Informs instructors that another slide follows.

Exercises



Directs students to training exercises.



Announces that a lesson is complete; there are no more slides in the section.

Loading Test Data

In order to perform the exercises importing data, you will need to load the following four files:

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- train.p
- train1.sample
- train2.sample
- train3.sample

These files are contained in the TestData file folder on the CD accompanying this training material.

You need to put them in a directory that will be recognized by MFG/PRO.

If you are running GUI and have a Windows icon that you double-click to start MFG/PRO, use the following procedure.

- 1 Right click on the MFG/PRO icon, select Properties.
- 2 Click on the Shortcut tab, and look at the Start in field.
The value in the Start in field is a directory (e.g., c:\Program Files\QAD\...). This is the directory where you want to put the files.

If you do not have an MFG/PRO icon, and you start MFG/PRO by selecting the Start button, then Programs, etc., use the following procedure.

- 1 Right click on the Start button, then select Explore.
You will get a Microsoft Explorer session with a Programs folder.
- 2 Double click on the Programs folder.
You should see the same program selection that you see when you select the Start button.
- 3 Double click on the icons in the Programs folder until you find MFG/PRO.
- 4 Right click on the MFG/PRO icon, select Properties.
- 5 Click on the Shortcut tab, and look at the Start in field.
The value in the Start in field is a directory (e.g., c:\Program Files\QAD\...). This is the directory where you want to put the files.

Now you need to create the three EDI files for the training exercises. The three *.sample files are templates containing sequences and orders, but no dates. The train.p file is used to prompt you for a schedule start date.

- The date you enter will be used by train.p to create the other three files
- The schedule start date is always Monday of the following week

The train.p file is a PROGRESS program and needs to be run from a PROGRESS session using the following procedure:

- 1 Start MFG/PRO.
- 2 At the main menu, select User Menu, then Progress Editor.
An empty Procedure Editor window displays.
- 3 Type `run train.p` then press F2 to execute the statement.
- 4 A new window displays prompting you to Please enter date (MM/DD/YY):. Enter next Monday's date and press Enter.
As the system creates each *.866 file a message displays.
- 5 When all the files have been created, a message displays telling you Procedure complete. Press space bar to continue. Press the space bar.
The Procedure Editor window displays.
- 6 Select File, then Exit. Select No at the warning.
You are now back at the MFG/PRO main menu.

The last step is to place the files in a location accessible by the students. You have two options:

- Copy the three *.866 files to each of the students' work stations, putting the files in the Start in directory of each PC.
 - You will need a floppy disk to do this option
- Copy the three *.866 files to a network directory that each of the students can access. When it is time to import each file, the student can enter the "fully qualified" name of the file in the Import File/Process Name field of EDI Document Import 35.13.
 - Fully qualified name means you enter the network drive letter and directory names, for example, `c:\Program Name\QAD\MFGPRO eB\train1.866`

Class Kit

Kit for Students

- Customer Sequence Schedules Training Guide, 70-2786A
- MFG/PRO eB GUI demo CD
 - Install the Database: Train for the exercises in this training course

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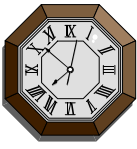
Kit for Instructors

The instructor kit is the same as the student kit with the addition of the PowerPoint slides.

Configuration and Setup for This Course

For hardware requirements, refer to the Readme files on the MFG/PRO demo CDs.


Facilities

		
Telephone/Fax	Class Hours	Emergency
		
Messages	Breaks	
		
Restrooms	Parking	Smoking

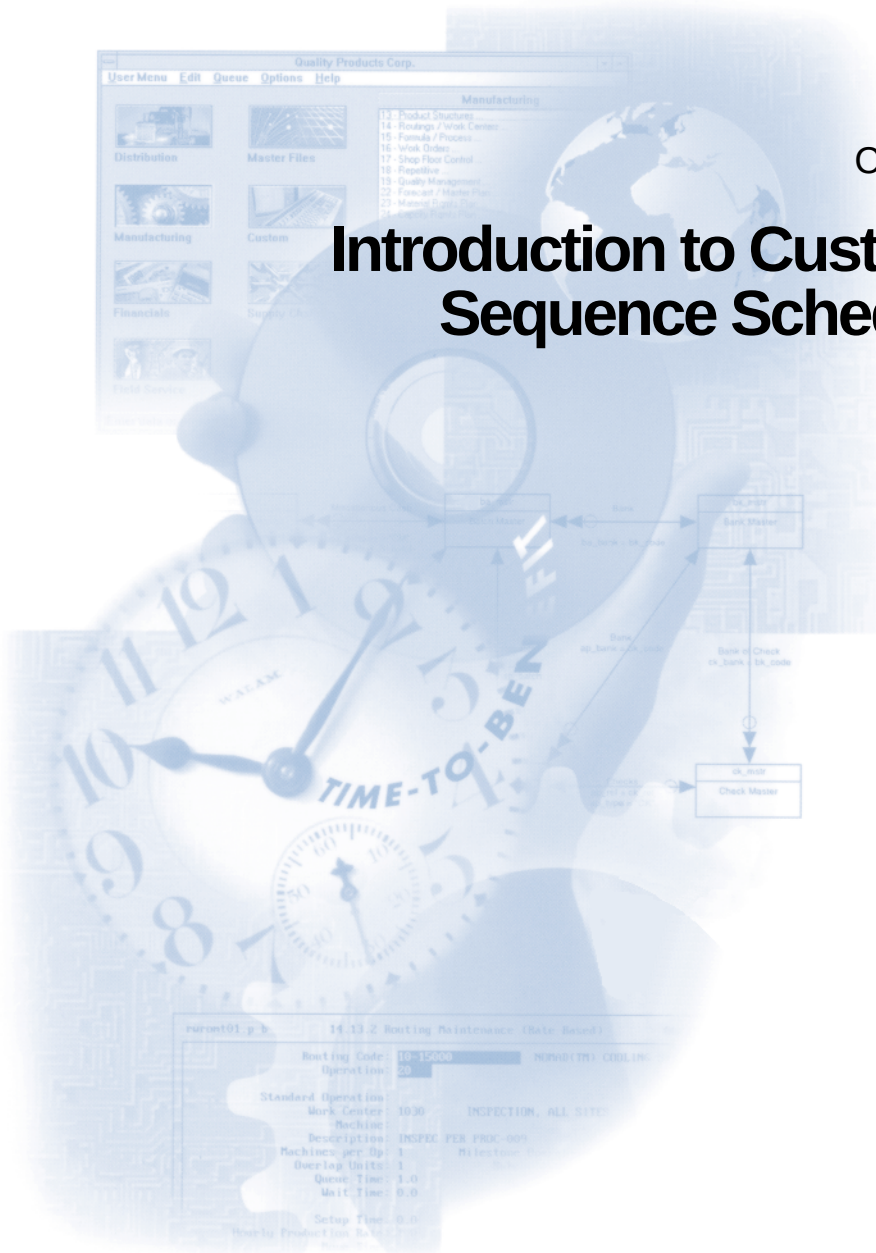
CSS-IN-030

General Training Facilities Information

- Telephone or fax
- Messages
- Restrooms
- Class hours: start and finish times, and punctuality
- Breaks: frequency, approximate times
- Parking considerations; carpooling
- Emergency procedures: location of first aid, contact person for assistance
- Exit locations, building hours
- Location of approved smoking area

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Introduction to Customer Sequence Schedules



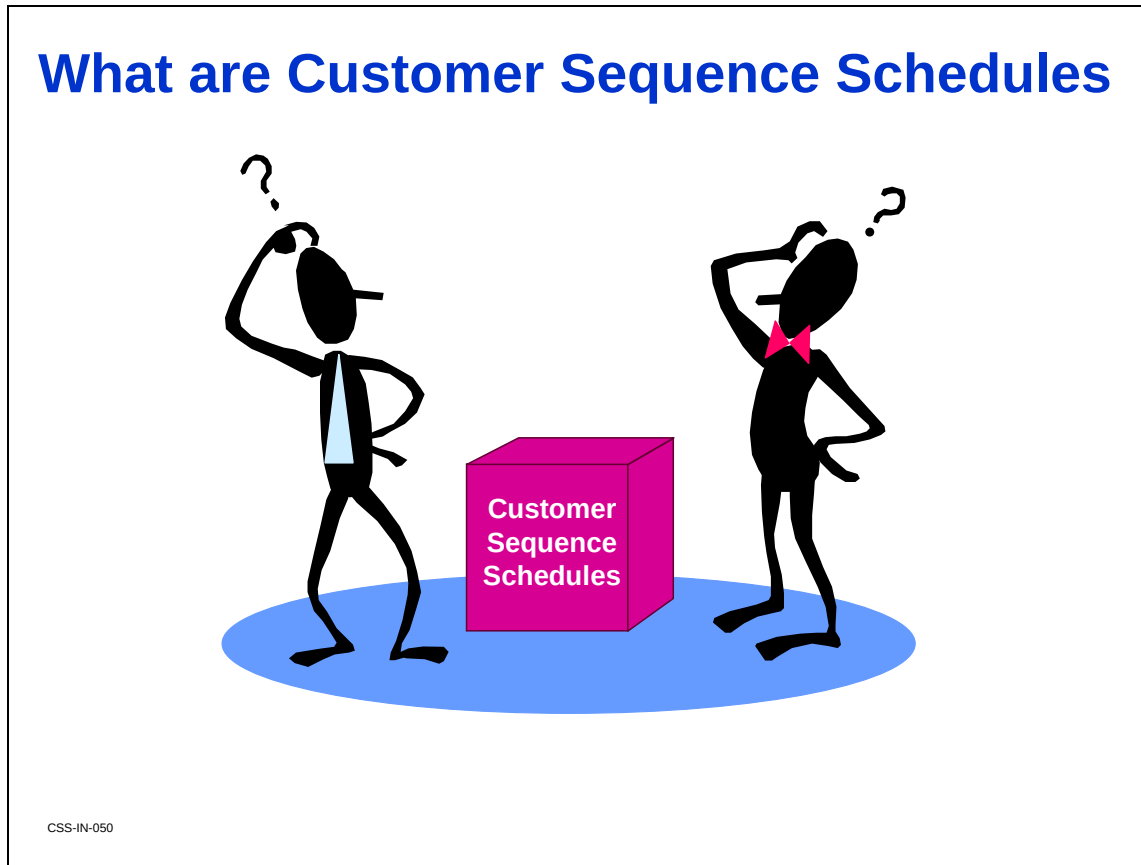


Course Overview

- ♦ Introduction to Customer Sequence Schedules
- ♦ Business Considerations
- ♦ Set up Customer Sequence Schedules
- ♦ Load Customer Sequence Schedules
- ♦ Plan Customer Sequence Schedules
- ♦ Ship Customer Sequence Schedules
- ♦ Customer Sequence Schedules Features and Options

CSS-IN-040

Course Overview



What are Customer Sequence Schedules

The Customer Sequence Schedules (CSS) 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 Does It Do



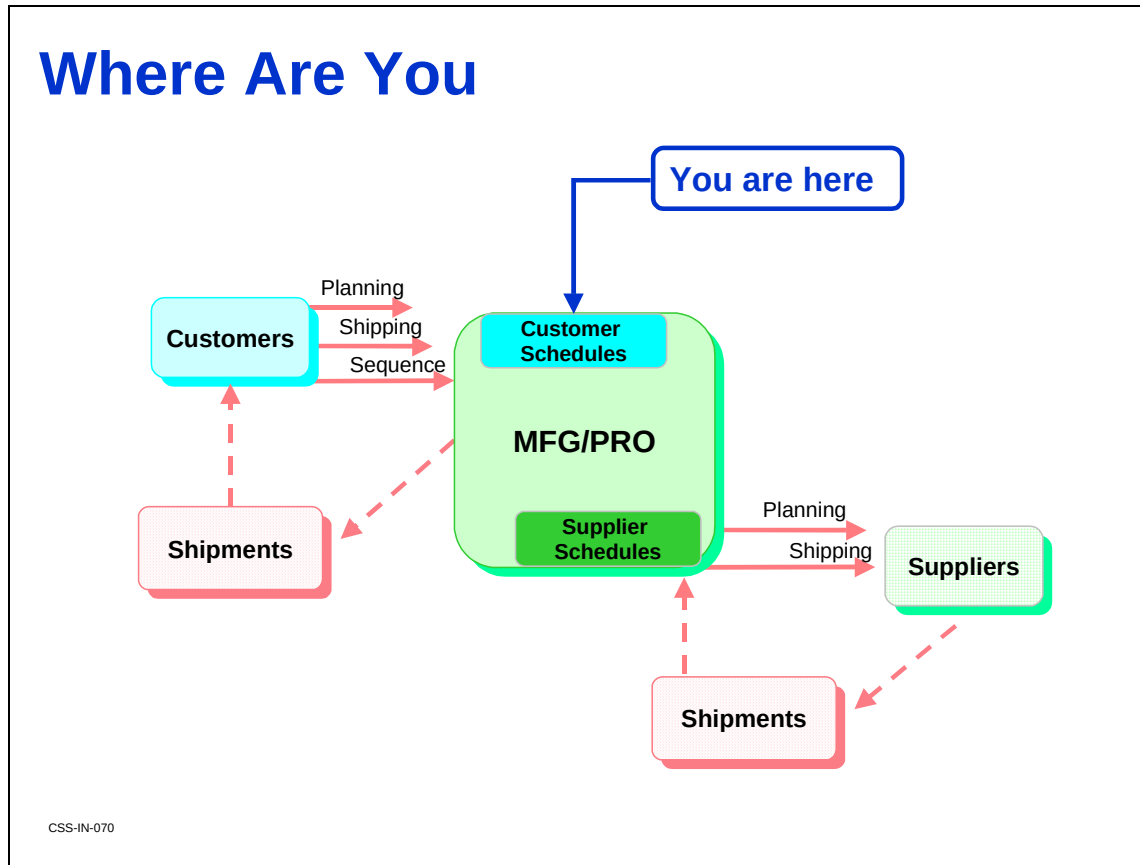
CSS-IN-060

What Does It Do

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

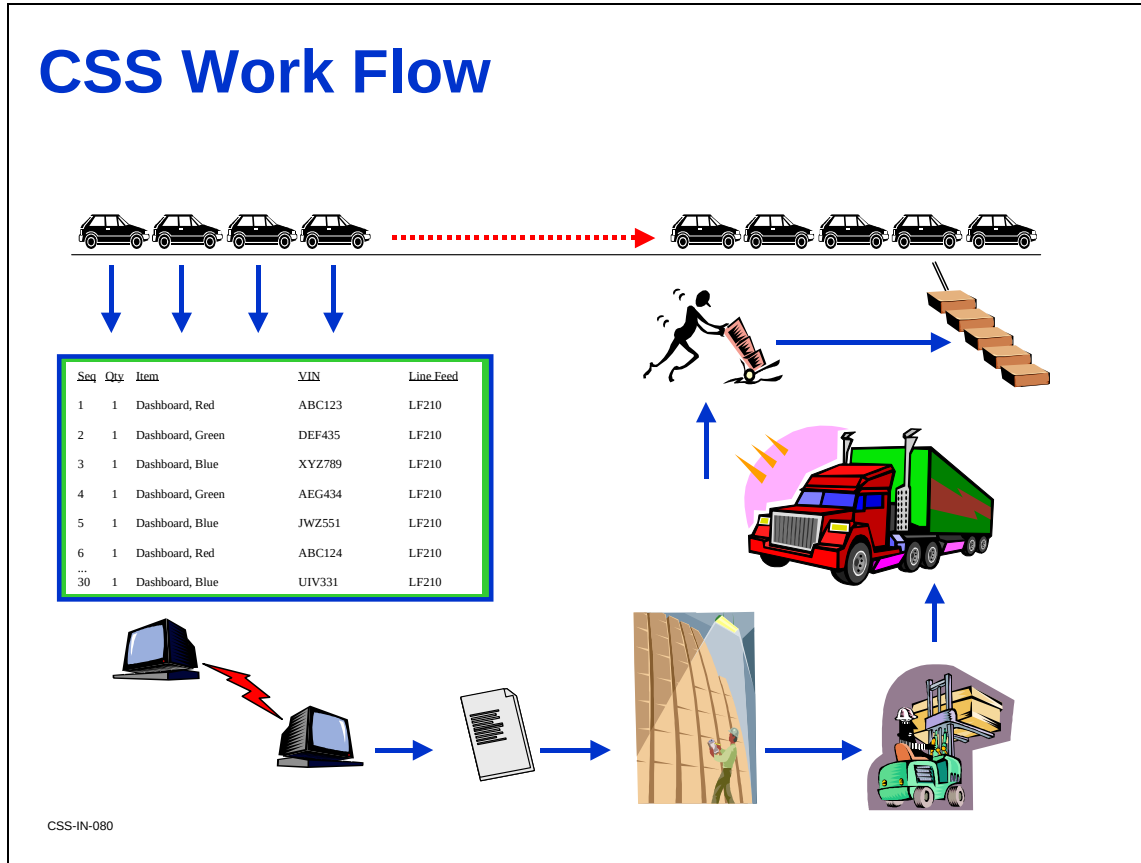
- Set up default sequence schedule details
 - Customize the default sequence schedule information for individual customer/ship-to
 - Dates, times, items, quantities
 - Destination information
 - Desired packing order
- Manage short term requirements that include the sequence in which those requirements will be consumed

- Use the sequence schedule data to plan your production and shipping of the customer's requirements
- Receive incoming customer sequence schedules using standard EDI or 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



Where Are You

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



CSS Work Flow

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.

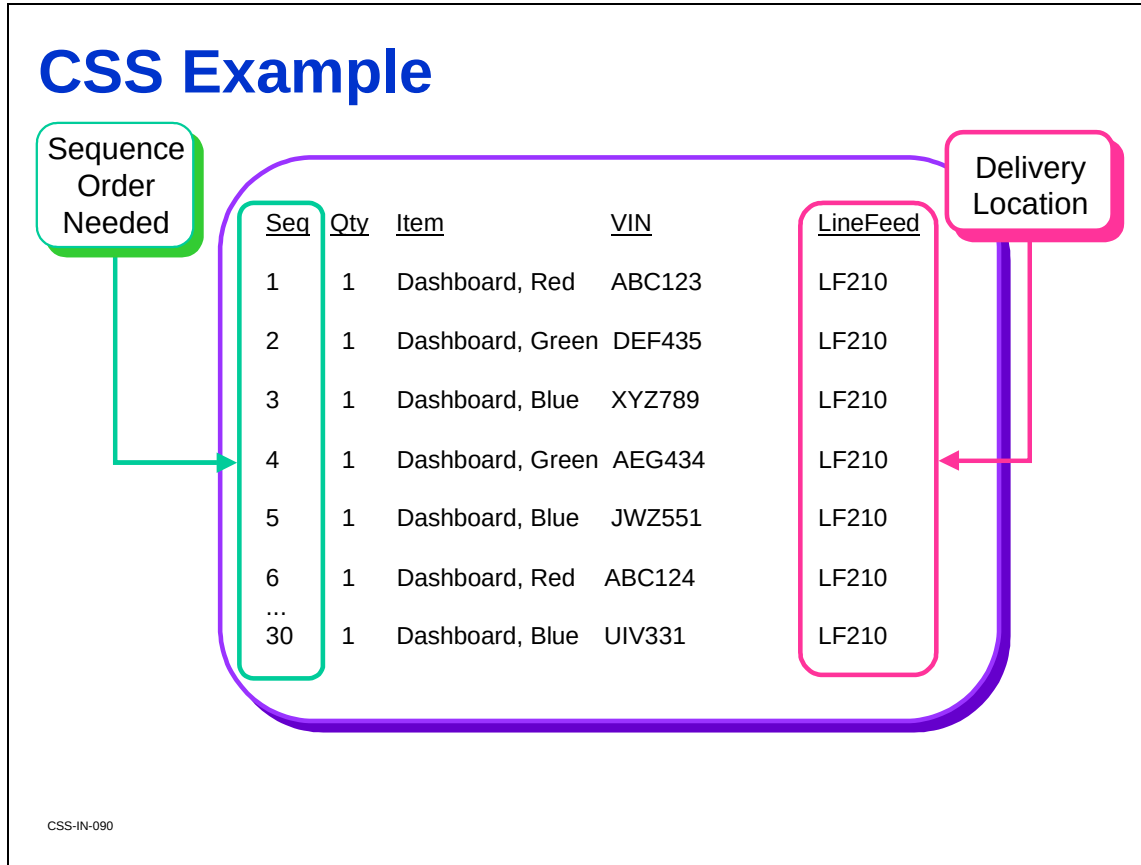
- Sun Roofs
- Dashboards
- Seats

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.

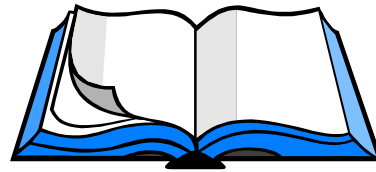
Suppliers receiving these customer sequence schedules need accurate and timely visibility into customer production line activity. They use the sequence schedule requirements to plan the manufacturing and delivery of the correct parts, in the correct sequence, to their customers. The sequence information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



CSS Example

Terminology

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



CSS-IN-100

Terminology

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 – 02/07/2000

Customer Reference

- Identifies the customer's end item

- VIN (automotive)
 - Serial Number
- Used as an ID to track sequences
 - Must be unique
 - For example:
 - 1FMRU1768XLB38739
 - 1FMRU1865XLB38289
 - 1FMPU18L2XLB3751

Customer Sequence

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

Line Feed

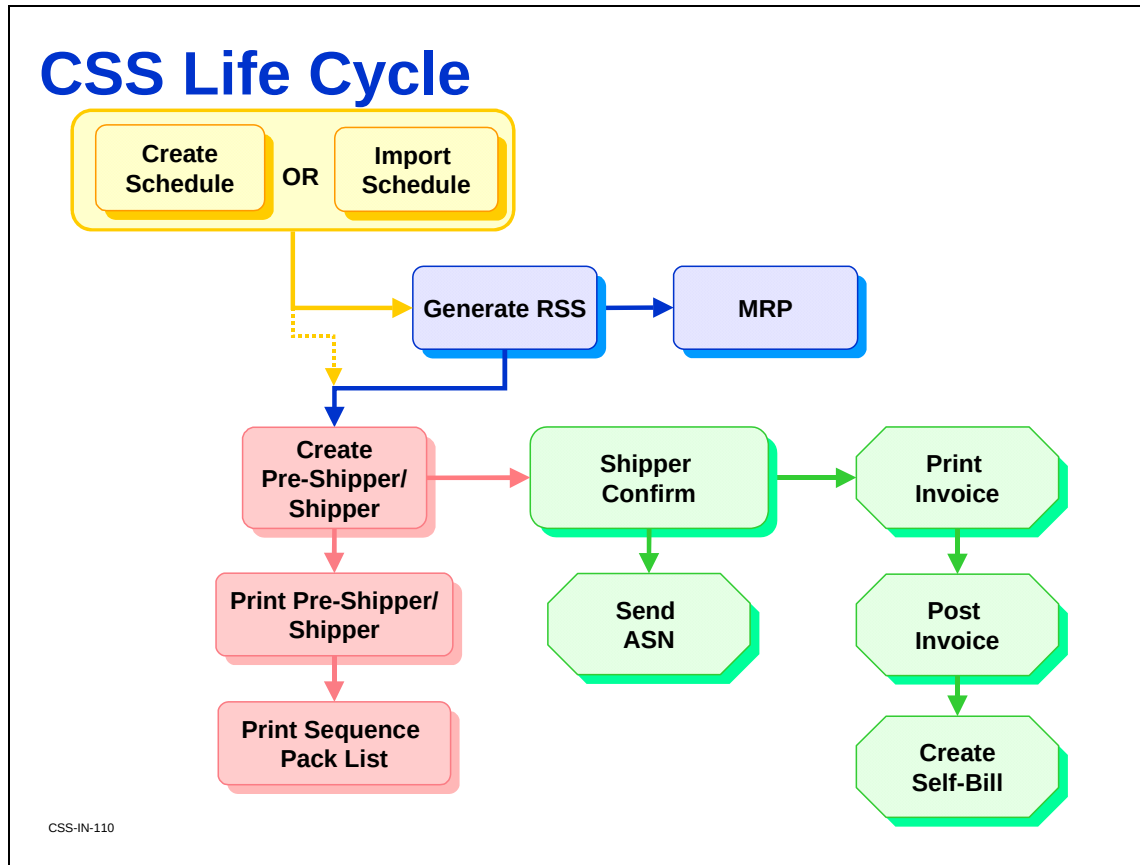
- Identifies location within customer's site for material to be delivered

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
- Accompanies pre-shipper (total quantity)
- Displays items in sequence
- Facilitates material handling
 - Staging
 - Shipping



CSS Life Cycle

Processing CSS



CSS-IN-120

Processing CSS

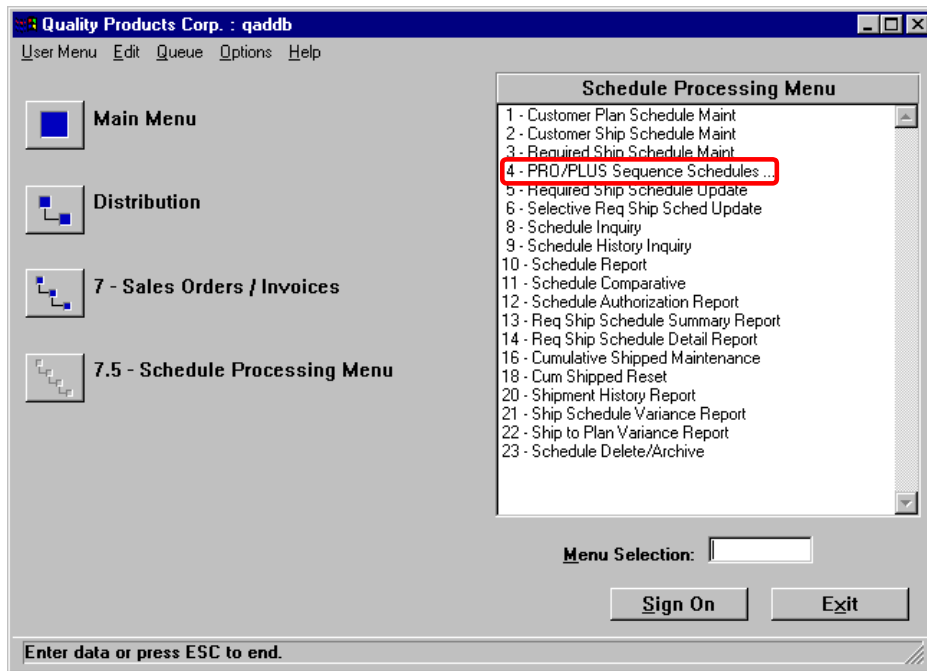
The typical procedure for processing a customer's sequence scheduled order is:

- 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.

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- 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.

7.5 – Schedule Processing Menu

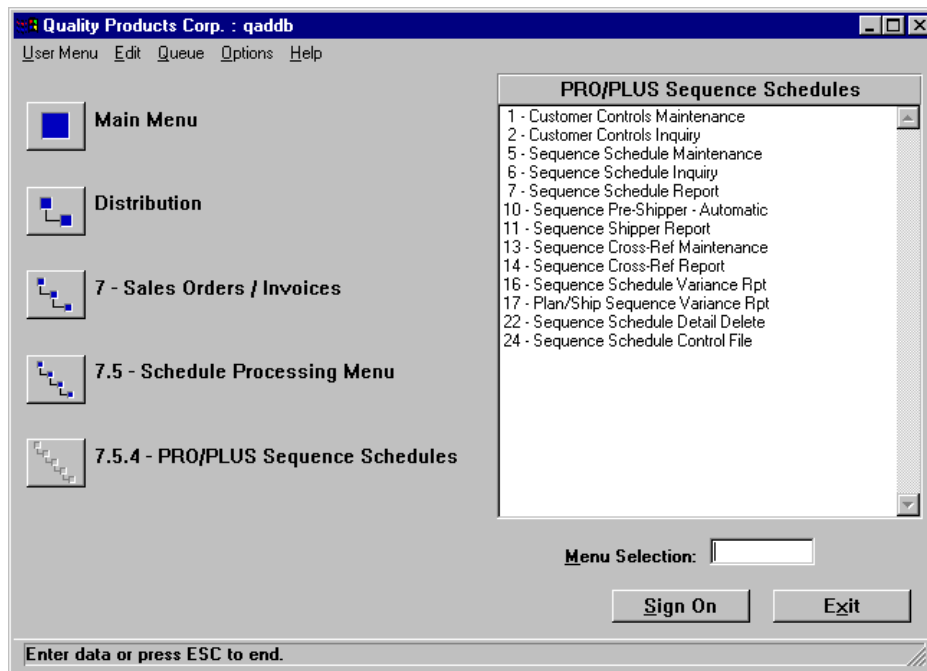


CSS-IN-130

Customer Sequence Schedules Menu

You access the CSS functions from the Schedule Processing Menu 7.5.

7.5.4 – PRO/PLUS Sequence Schedules Menu



CSS-IN-140

PRO/PLUS Sequence Schedules Menu

Menu Number 7.5.4

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



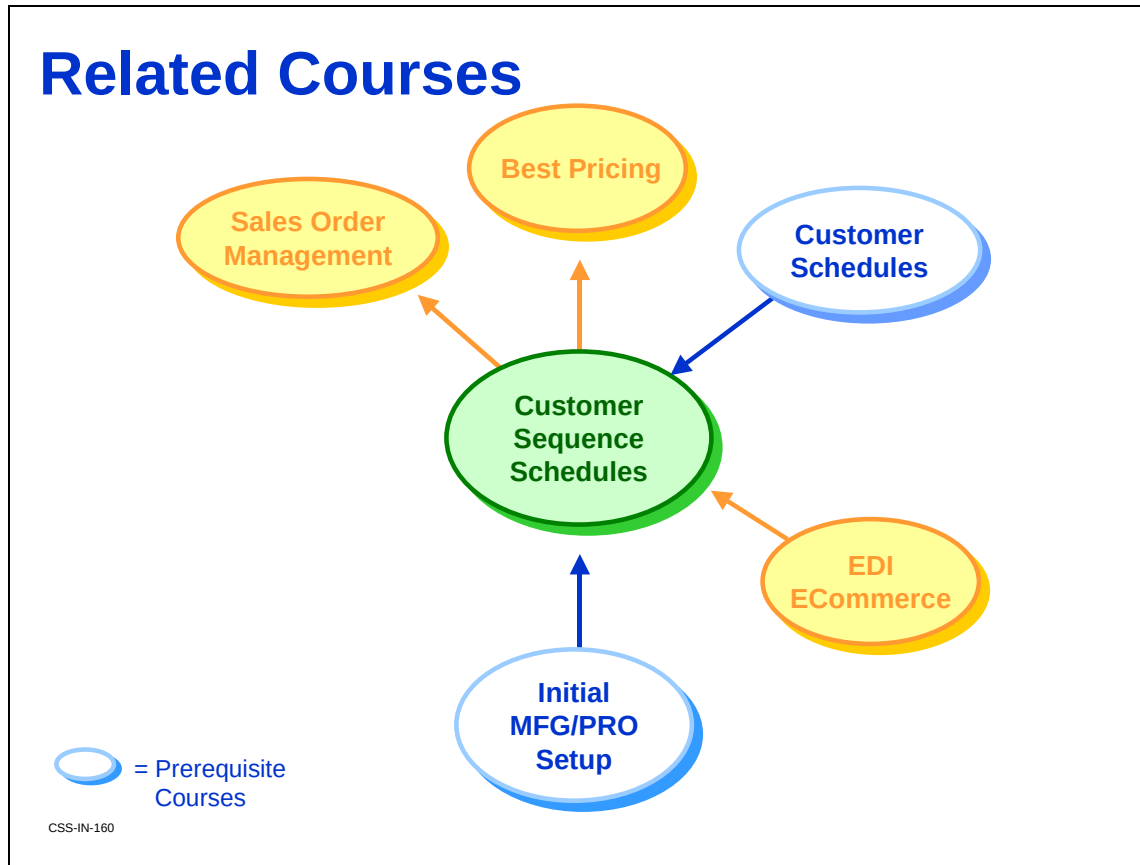
Course Objectives

In this class you learn how to:

- ♦ Identify some key business considerations before setting up CSS in MFG/PRO
- ♦ Set up CSS in MFG/PRO
- ♦ Loading CSS in MFG/PRO
- ♦ Planning CSS in MFG/PRO
- ♦ Shipping CSS in MFG/PRO
- ♦ CSS Features and Options

CSS-IN-150

Course Objectives



Related Courses



Course Overview

- ✓ Introduction to Customer Sequence Schedules
 - ◆ Business Considerations
 - ◆ Set up Customer Sequence Schedules
 - ◆ Load Customer Sequence Schedules
 - ◆ Plan Customer Sequence Schedules
 - ◆ Ship Customer Sequence Schedules
 - ◆ Customer Sequence Schedules Features and Options

CSS-IN-170

CHAPTER 2

Business Considerations





Business Considerations

In this section you learn how to:

✓ **Identify some key business considerations before setting up CSS in MFG/PRO**

- ◆ Set up CSS in MFG/PRO
- ◆ Loading CSS in MFG/PRO
- ◆ Planning CSS in MFG/PRO
- ◆ Shipping CSS in MFG/PRO
- ◆ CSS Features and Options

CSS-BU-010

Business Considerations

Business Considerations

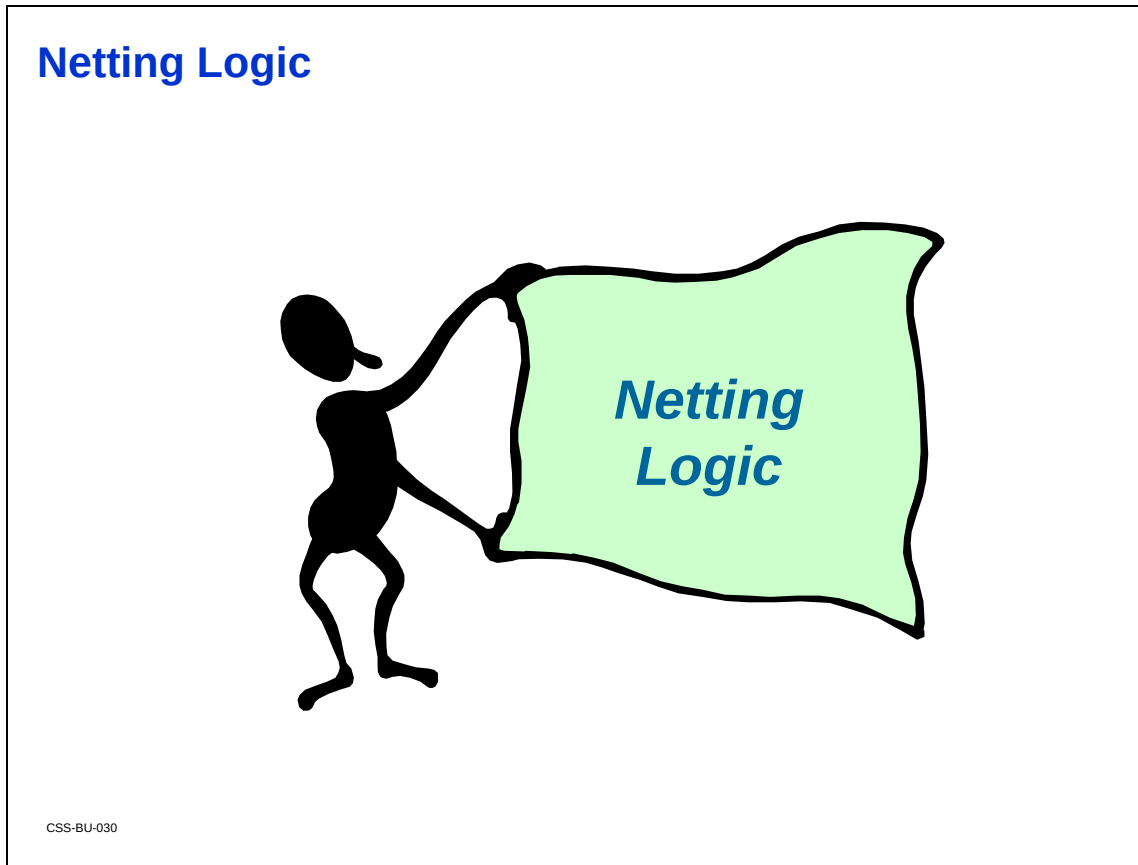


- ✚ Netting Logic
- ✚ EDI/EDI ECommerce



CSS-BU-020

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



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 MFG/PRO

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 Orders

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



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

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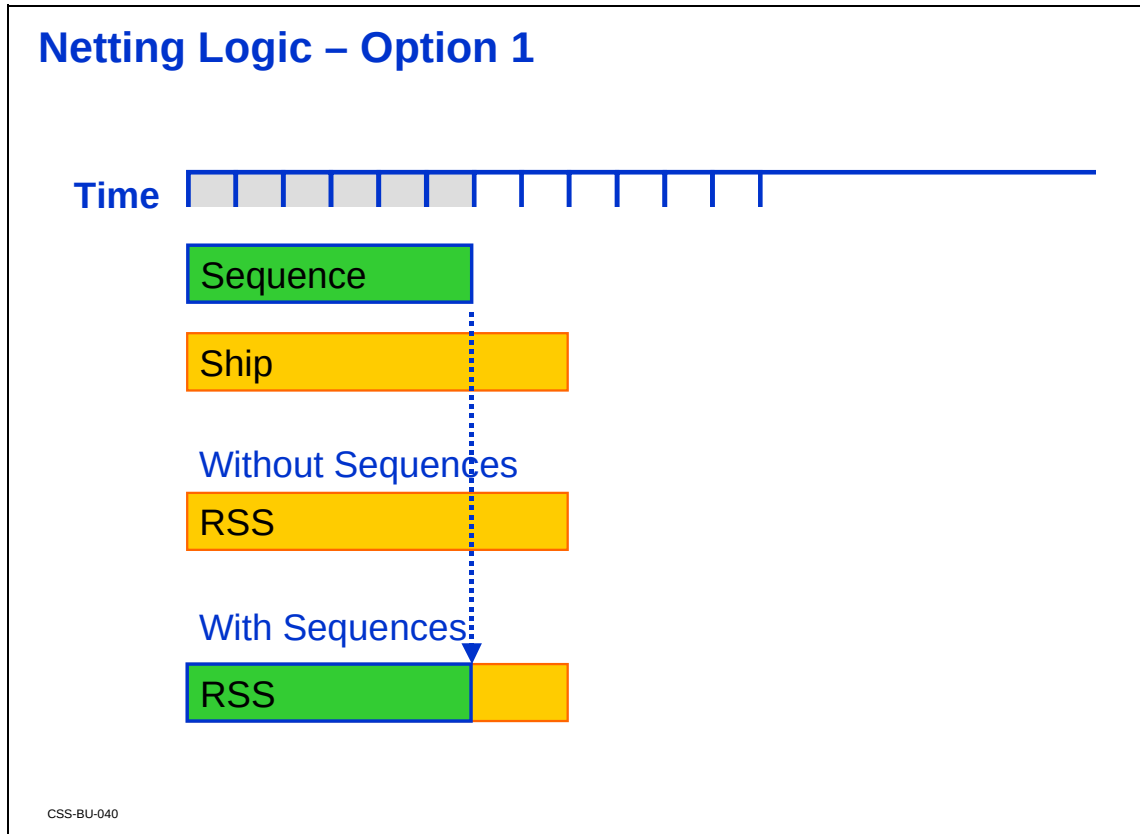
- Option 4 – combines sequence, planning, and shipping schedules, with the greater of the shipping or planning schedule taking precedence in the interval of the schedule overlaps
 - Consume logic

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



See in this training guide: *Create Sequence Schedule Order* on page 118



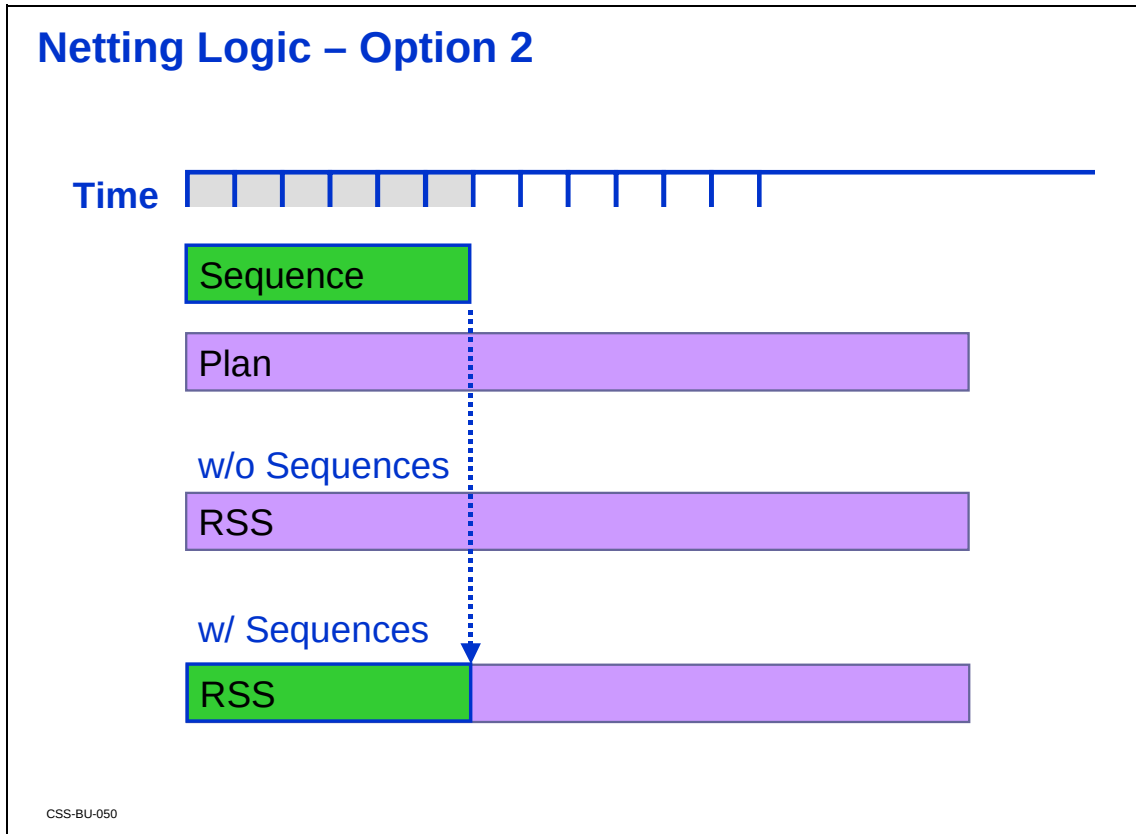
Option 1

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 five.

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



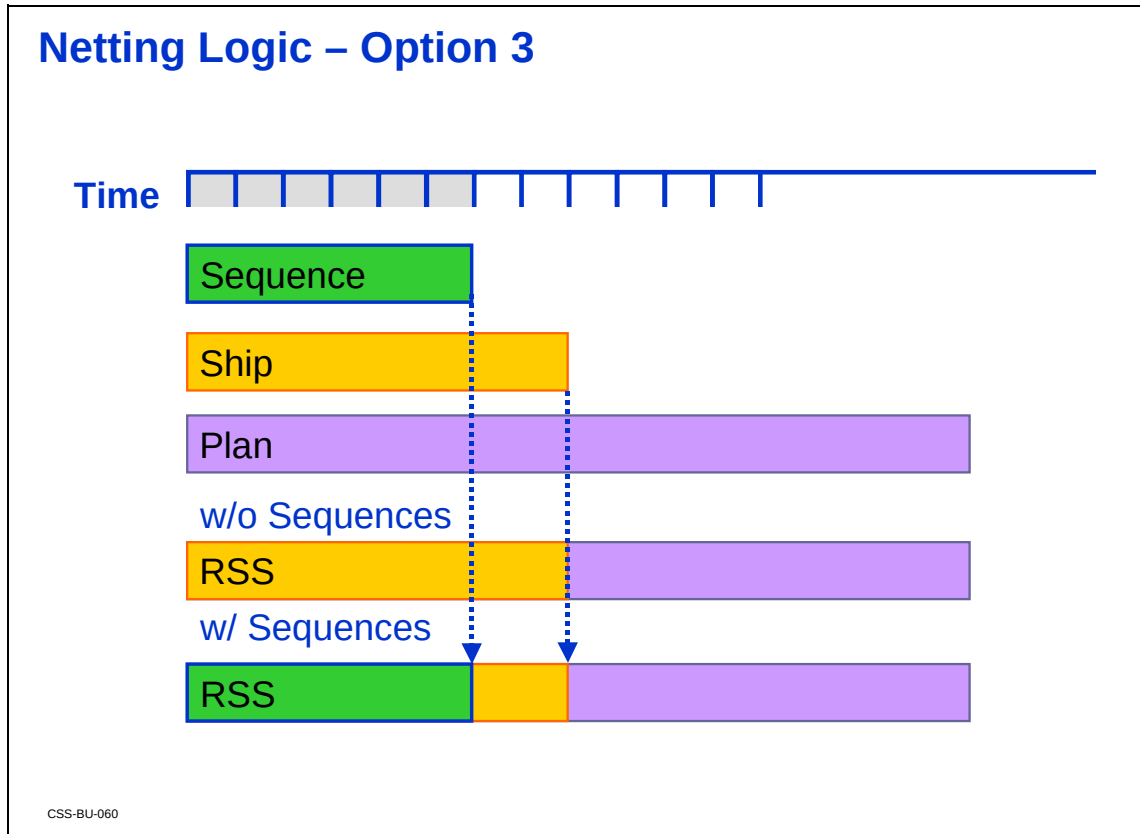
Option 2

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 five.

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



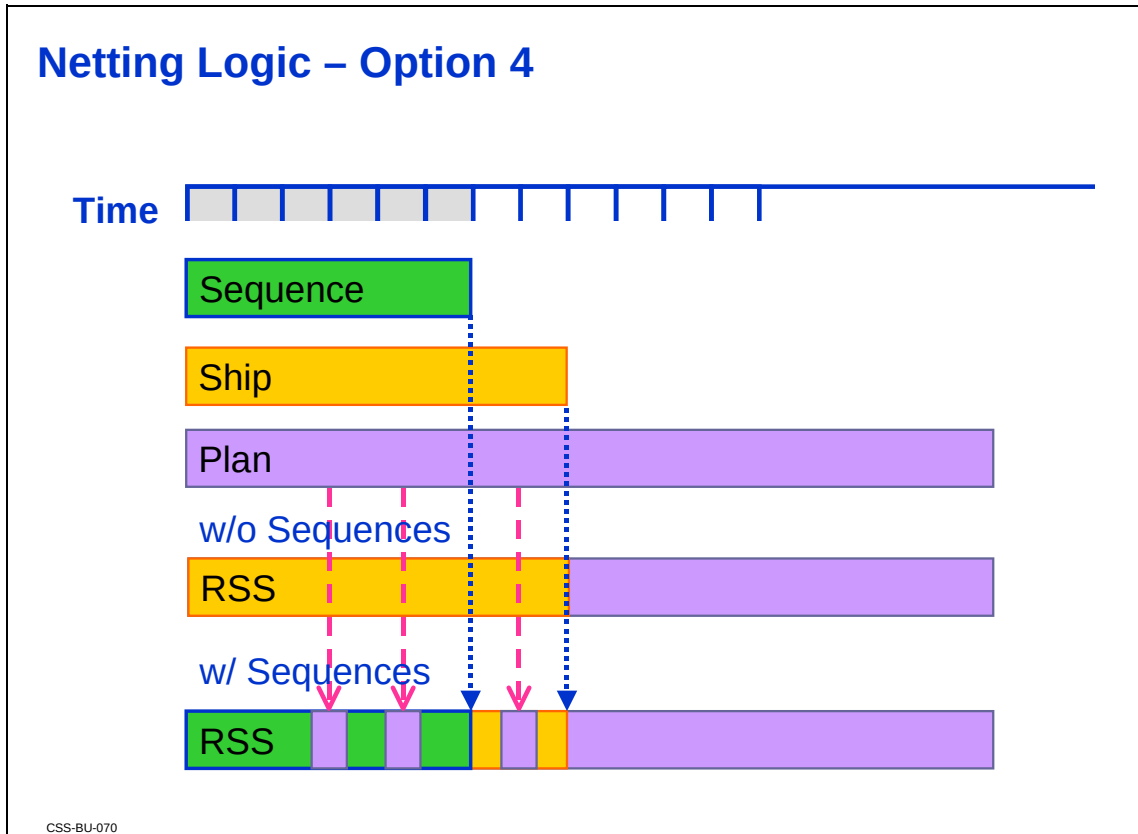
Option 3

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 five.

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

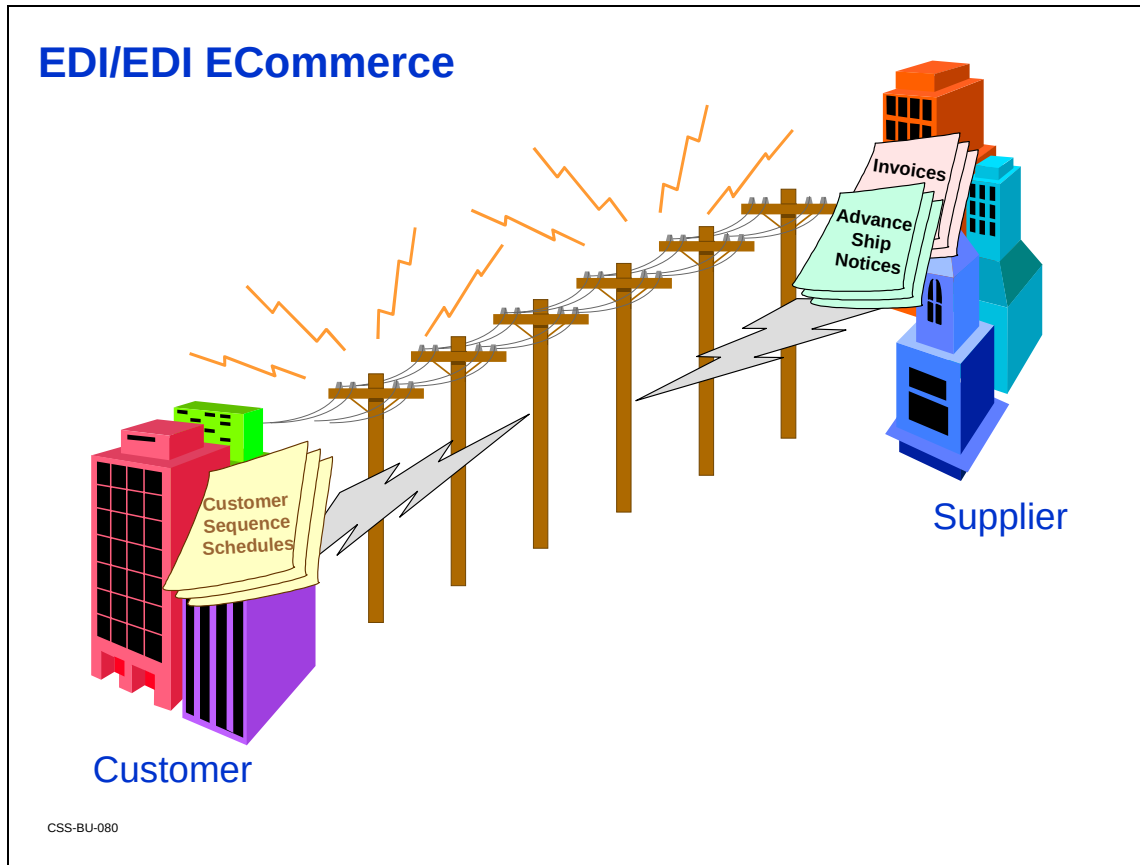


Option 4

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.



EDI/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 MFG/PRO 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.

Why Consider?

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

Functionality in MFG/PRO

- Support import of customer sequence schedules
- Support export of invoices or ASNs

Setup Implications

- EDI/ECommerce software, files, etc., need to be setup



See in this training guide: *Set up EDI* on page 96



Discussed in the following Training Guide: ECommerce

Review

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

CSS-BU-090

Review



Course Overview

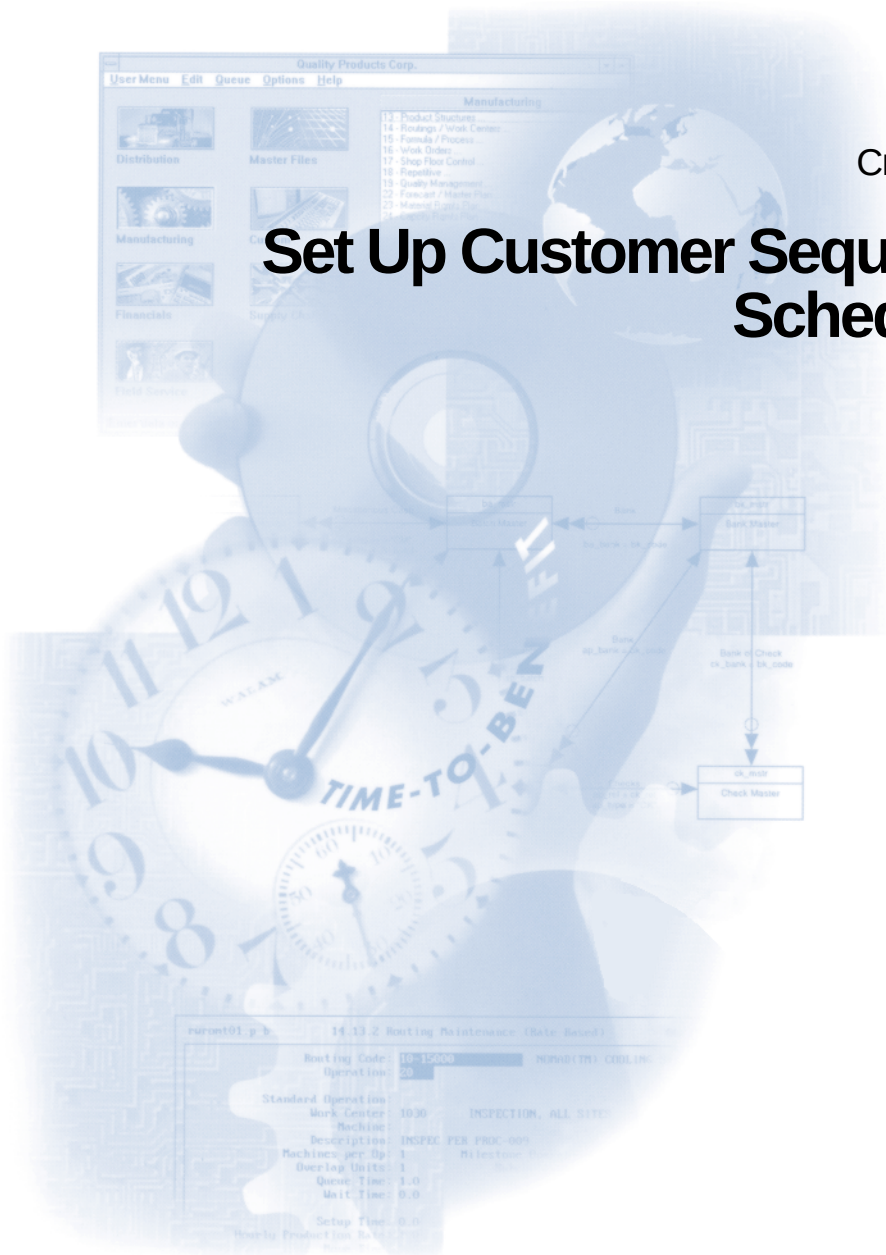
- ✓ Introduction to Customer Sequence Schedules
- ✓ Business Considerations
 - ◆ Set up Customer Sequence Schedules
 - ◆ Load Customer Sequence Schedules
 - ◆ Plan Customer Sequence Schedules
 - ◆ Ship Customer Sequence Schedules
 - ◆ Customer Sequence Schedules Features and Options

CSS-BU-100

Course Overview

CHAPTER 3

Set Up Customer Sequence Schedules





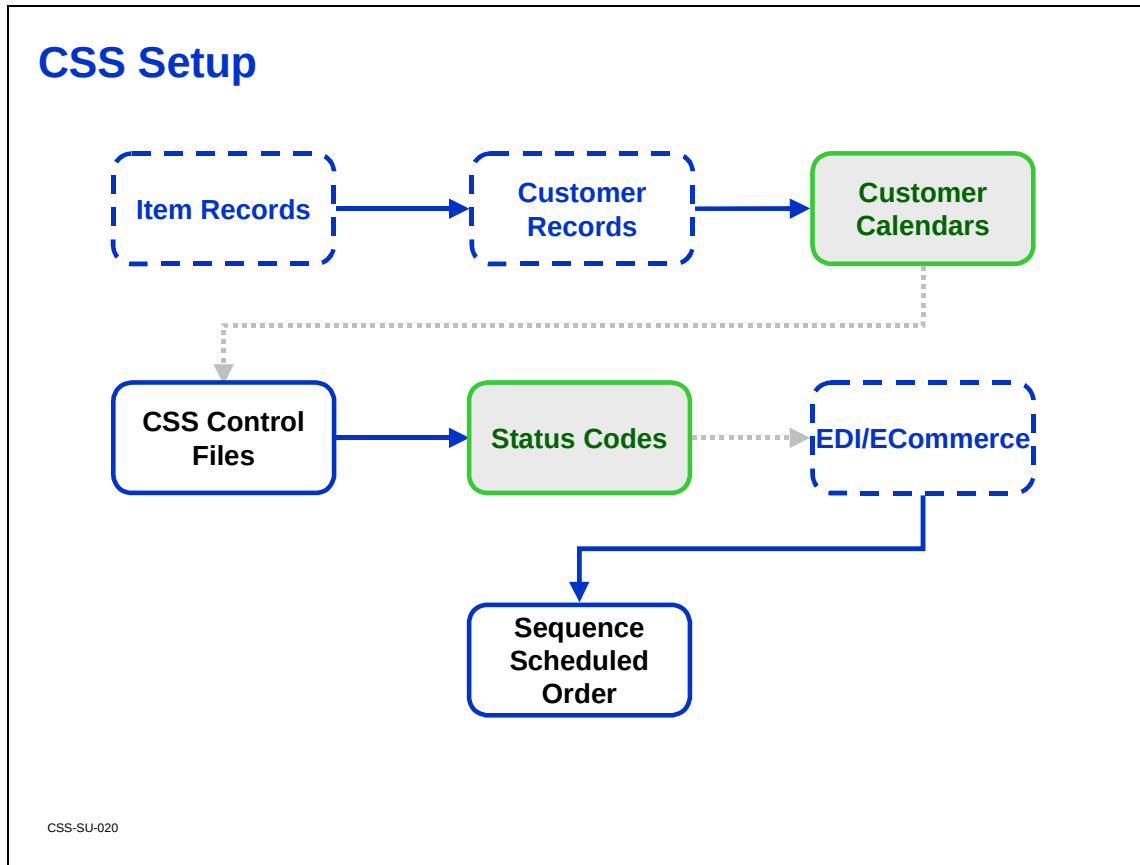
Set up CSS

In this section you learn how to:

- ✓ Identify some key business considerations before setting up CSS in MFG/PRO
- ✓ **Set up CSS in MFG/PRO**
 - ♦ Loading CSS in MFG/PRO
 - ♦ Planning CSS in MFG/PRO
 - ♦ Shipping CSS in MFG/PRO
 - ♦ CSS Features and Options

CSS-SU-010

Set up CSS



CSS Setup

This illustration is a suggested setup sequence of master files for the CSS 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. Reading the illustration:



Boxes with solid lines are required to set up CSS and are covered in this course.



Shaded boxes reflect optional steps, but are covered in this course.



Boxes with dotted lines are required, but are covered at length in another course.

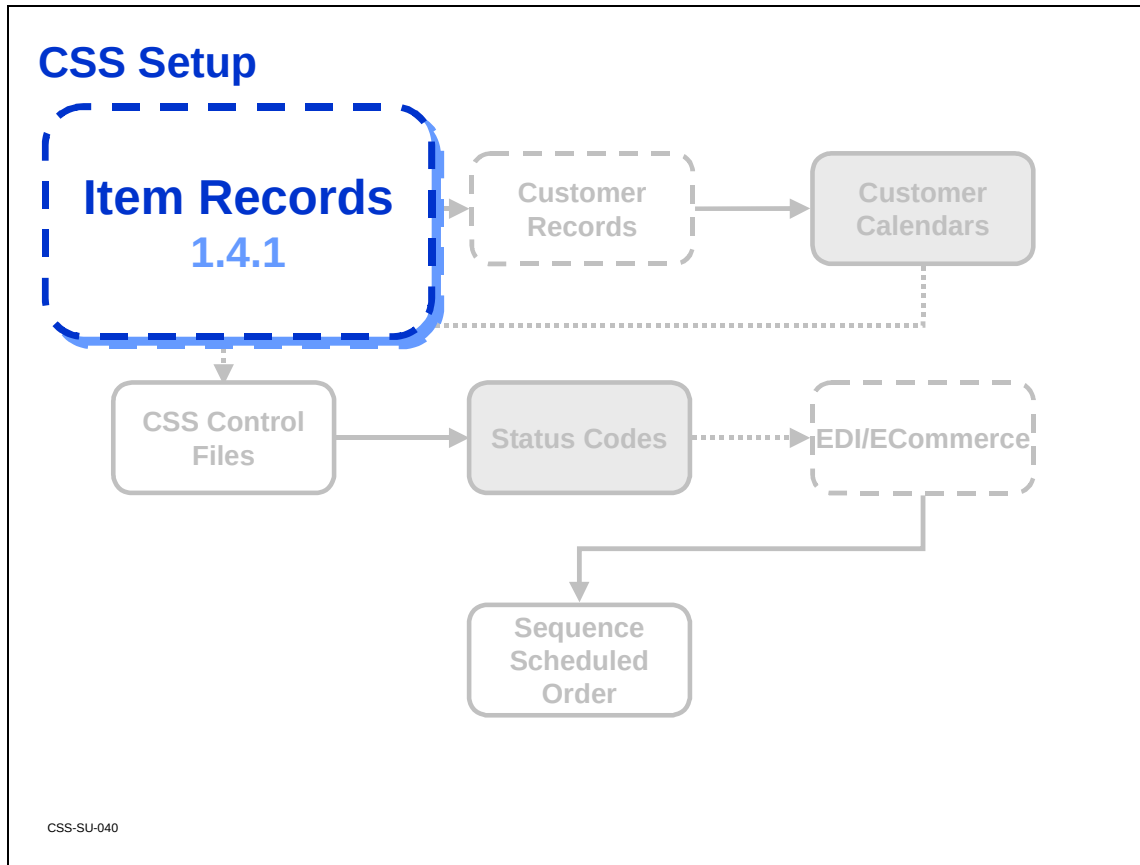


How Much Set Up Is Involved

Setting up CSS is minimal and involves the following:

- 1 CSS Control Files.
 - a Enable CSS.
 - b Define system wide control file parameters.
 - c If desired, define customer control file parameters.
- 2 Define parameters for EDI/ECommerce.
- 3 Create sequence scheduled order.

However, before you can begin setting up CSS, you must have already set up the appropriate item and customer records.



Item Records

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 Master file 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



Discussed in the following Training Guide: Initial MFG/PRO Set Up



CSS 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* on page 13

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.

Exercise: Add Item Record

Description: Create first item record for the new Fjord customer.

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

Field	Data
Item Number	part1
UM	EA
Description	sunroof, red

Use Item Master Maintenance 1.4.1

- 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

Description: 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).

- 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
<i>Use Item Master Copy 1.4.12</i>	

- 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

1.16 – Customer Item Maintenance

Customer Item Maintenance (1-Cust Item)

User Menu Edit Navigate Config Options Window Help

Description User Fields Browse

Customer: Customer Item:

Must exist in Item Master File

Description

Item Number:

Comment:

Display Item:

ECO:

Prints on Shipper & ASNs

F1=Help F2=Go F5=Delete F9=Prev F10=Next ESC=End F12=Edit

CSS-SU-060

Cross-References

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

Note 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

Field Definitions

Customer

The customer code or ship-to code.

Customer Item

The item number used by the customer.

Note When EDI or ECommerce imports documents containing the customer's item number, if they use spaces in the item number, the spaces are removed. For example, if the customer's item number is XZY 1234 AAC, you would enter XZY1234AAC.

Item Number

Your internal item number. This is the item number being cross-referenced to the customer's item number.

Comment

Used for reference only.

Display Item

This shows how the customer wants their item number to print (e.g., on bar code labels). If the customer uses spaces in their item number, you would enter the item number, with spaces. For example, using the same item number as entered in the Customer Item field, you would enter XZY 1234 AAC.

ECO

The customer's engineering change number (ECO). This prints on the shipper.

Note Customer item numbers cannot be the same as your internal item numbers.

Exercise: Create Customer Items for Each Part

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

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

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

Use Customer Item Maintenance 1.16

- 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:

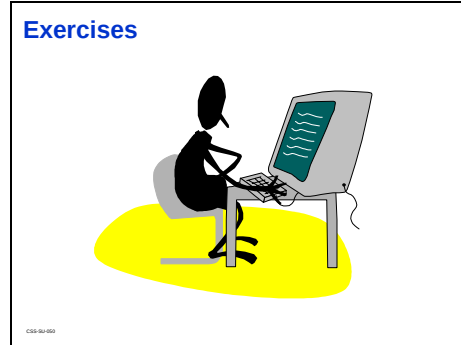
Field	Data
Customer/Ship-to	<blank>
Customer Item	sunroof-blue
Item Number	part3

- 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

Description: Each part needs to be added to inventory.

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

Field	Data
Item Number	part1
Quantity	1000
Site	10000
Location	100

Use Receipts - Unplanned 3.9

- 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:

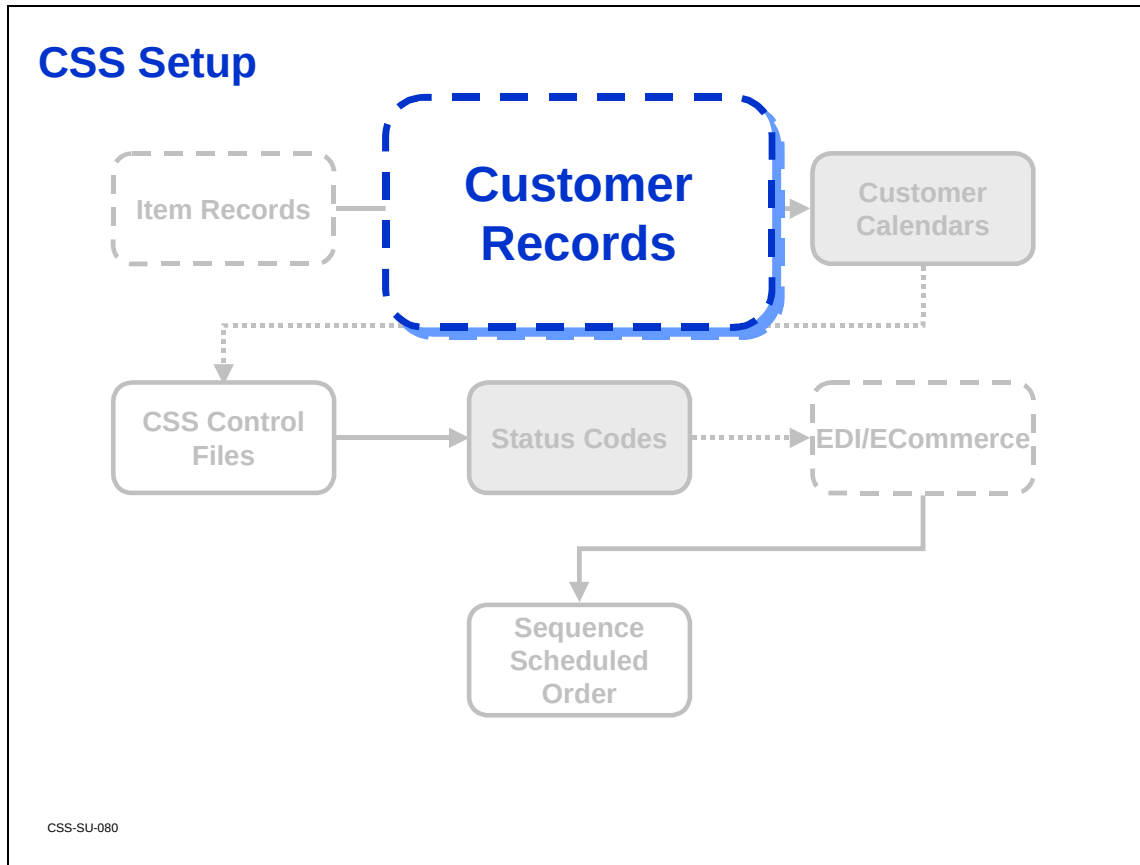
Field	Data
Item Number	part3
Quantity	1000
Site	10000
Location	100

- 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

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.



Discussed in the following Training Guide: Sales Order Management

2.1.1 – Customer Maintenance

Customer Maintenance

User Menu Edit Queue Options Help

Customer Address

Customer: 10010001

Name: Westwood Reliable

Address: Westwood Shopping Center

Address: 77 Sunset Strip

Address: Block B-2

City: Westwood State: CA Post: 89029 Format: 0

Country: United States of America USA County: 001

Attention: Rosetta Stone [2]:

Telephone: 213-923-0293 Ext: [2]: Ext:

Fax/Telex: [2]: Added: 10/09/88

Customer Data

Sort Name: Westwood Reliable Type: 1

Salespsn1: JJP Multiple: no Region: US

Ship Via: GROUND Currency: USD

AR Acct: 1200 Dual Pricing Cur:

Resale: 89-02-03 X88P Site: 10000

Remarks: STORE HOURS BETWEEN 10:30 AND 5 F Lang:

F1=Help F2=Go ESC=End *Next/Prev* Ctrl-X/C/V=Cut-Copy-Paste

CSS-SU-090

Customer Item Maintenance

Menu Number 2.1.1

Use Customer Item Maintenance 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

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

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

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

Use Customer Maintenance 2.1.1

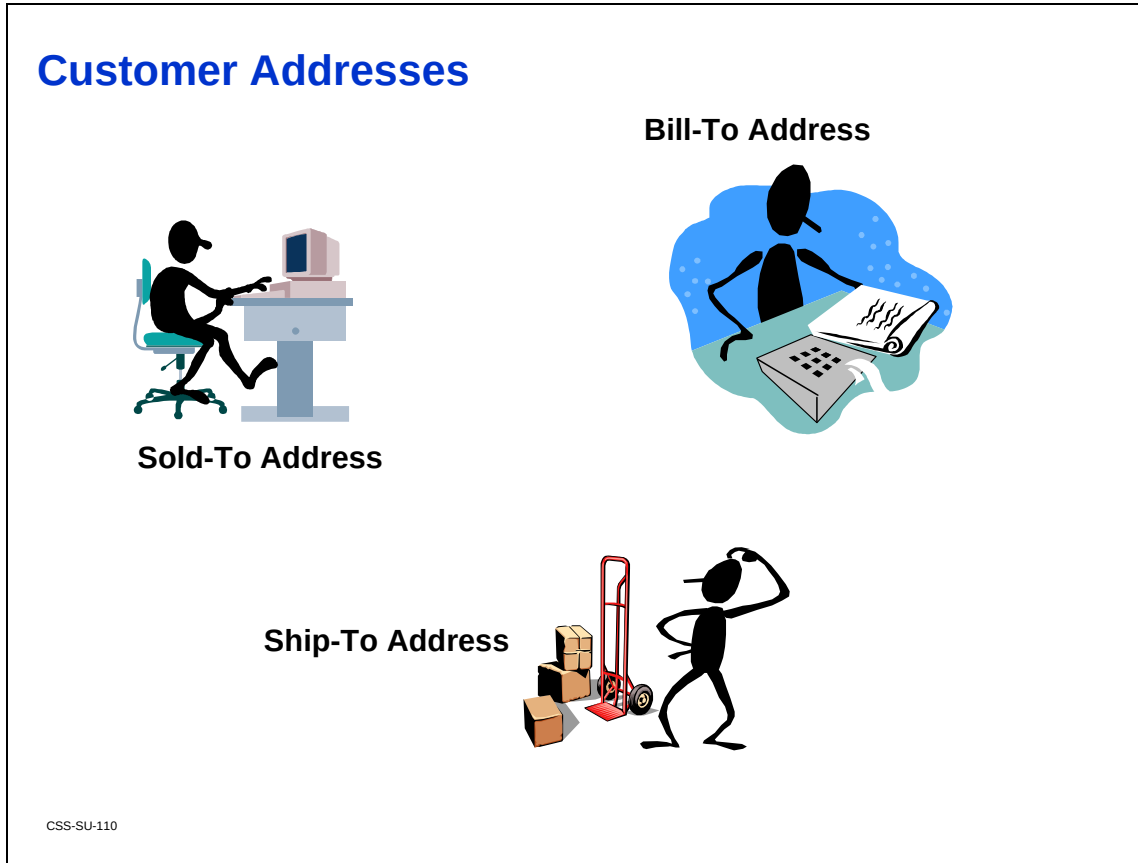
- 2 Advance to the Customer Data frame and enter:

Field	Data
Site	10000
Lang	US

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

Field	Data
Credit Limit	1,000,000,000





Customer Addresses

A sequence scheduled order references three customer addresses:

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

These three addresses can all be the same or they can be different.

2.1.1 – Customer Maintenance: Sold-To Address Data

Customer Maintenance

User Menu Edit Queue Options Help

Customer Address

Customer: 10010001

Name: Westwood Reliable

Address: Westwood Shopping Center

Address: 77 Sunset Strip

Address: Block B-2

City: Westwood State: CA Post: 89029 Format: 0

Country: United States of America USA County: 001

Attention: Rosetta Stone [2]:

Telephone: 213-923-0293 Ext: [2]:

Fax/Telex: [2]: Added: 10/09/88

Customer Data

Sort Name: Westwood Reliable Type: 1

Salespsn1: JJP Multiple: no Region: US

Ship Via: GROUND Currency: USD

AR Acct: 1200 Dual Pricing Cur:

Resale: 89-02-03 X88P Site: 10000

Remarks: STORE HOURS BETWEEN 10:30 AND 5 F Lang:

F1=Help F2=Go ESC=End *Next/Prev* Ctrl-X/C/V=Cut-Copy-Paste

CSS-SU-120

Sold-To Address

- Set up in Customer Maintenance 2.1.1
- 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

2.1.1 – Customer Maintenance: Bill-To Address Data

Customer Maintenance

User Menu Edit Queue Options Help

Customer Address

Customer: 10010001

Name: WESTWOOD HALLMARK

Address: WESTWOOD SHOPPING CENTER

Address: 70 SUNSET STRIP

Address: BLOCK B-2

City: WESTWOOD State: CA Post: 90029 Format: 0

Country: United States of America USA County:

Attention: MRS. SUSAN KNAPPER [2]:

Telephone: 213-555-0293 Ext: [2]:

Fax/Telex: [2]: Added: 10/09/88

Customer Credit Data

Credit Limit: 1,000 Disc %: 0.00%

Terms: 30 Finance Chg: yes Last Credit Review: / /

Credit Hold: no Statement: yes Last Credit Update: 12/16/94

Credit Rating: 3 Stmt Cycle: 1/1 High Credit: 1,000

DB Number: Dun Letter: yes High Date: 02/10/94

PO Required: no Last Payment: Last Sale:

Bill-To:

F1=Help F2=Go ESC=End Ctrl-X=Cut Ctrl-C=Copy Ctrl-V=Paste

CSS-SU-130

Bill-To Address

- 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

- 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

2.1.13 – Customer Ship-to Maintenance: Ship-To Address

Customer Ship-to Maintenance

User Menu Edit Queue Options Help

Customer Address

Customer: 10010001
 Name: Westwood Reliable
 Address: Westwood Shopping Center
 Address: 77 Sunset Strip
 City: Westwood
 County: LA
 State: CA 400
 Country: U.S.A
 Post: 89029 Format: 0

Customer Ship-To

Code: 1000001 Temporary: no
 Name: Westwood Reliable
 Address: Westwood Shopping Center
 Address: 77 Sunset Strip
 Address:
 City: Westwood State: CA
 Country: U.S.A.
 Attention: Clerk/Receiver
 Telephone: Ext:
 Fax/Telex:
 Sort Name: Westwood Reliable
 Post: 89029 Format: 0
 County:
 [2]:
 [2]: Ext:
 [2]: Language:

Sold-To / Ship-To Relationship

F1=Help F2=Go ESC=End F5=Delete Ctrl-X/C/V=Cut-Copy-Paste

CSS-SU-140

Customer Ship-to Maintenance

Menu Number 2.1.13

Sometimes there is more than one ship-to address for a single sold-to or bill-to customer. You can set up an alternate ship-to address for your customer using Customer Ship-to Maintenance.

- This links the customer's ship-to address with the customer's sold-to address (set up in Customer Maintenance 2.1.1)
- Alternate ship-to address references can be set up in advance or entered as needed for one-time drop shipments
- You can set up more than one ship-to address for a customer
- You can also set up a temporary ship-to address

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- Set Temporary flag to Yes
- Temporary addresses are deleted automatically by Closed AR Delete/Archive 27.23 when no other open records for that address exist
- Temporary Ship-to addresses can be changed to permanent by changing the Temporary flag to No

Exercise: Create Ship-To Addresses

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

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

Field	Data
Customer	Fjord

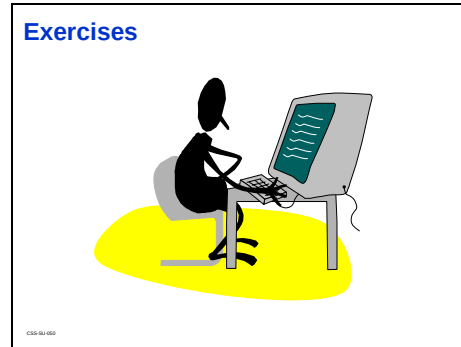
Use Customer Ship-to Maintenance 2.1.13

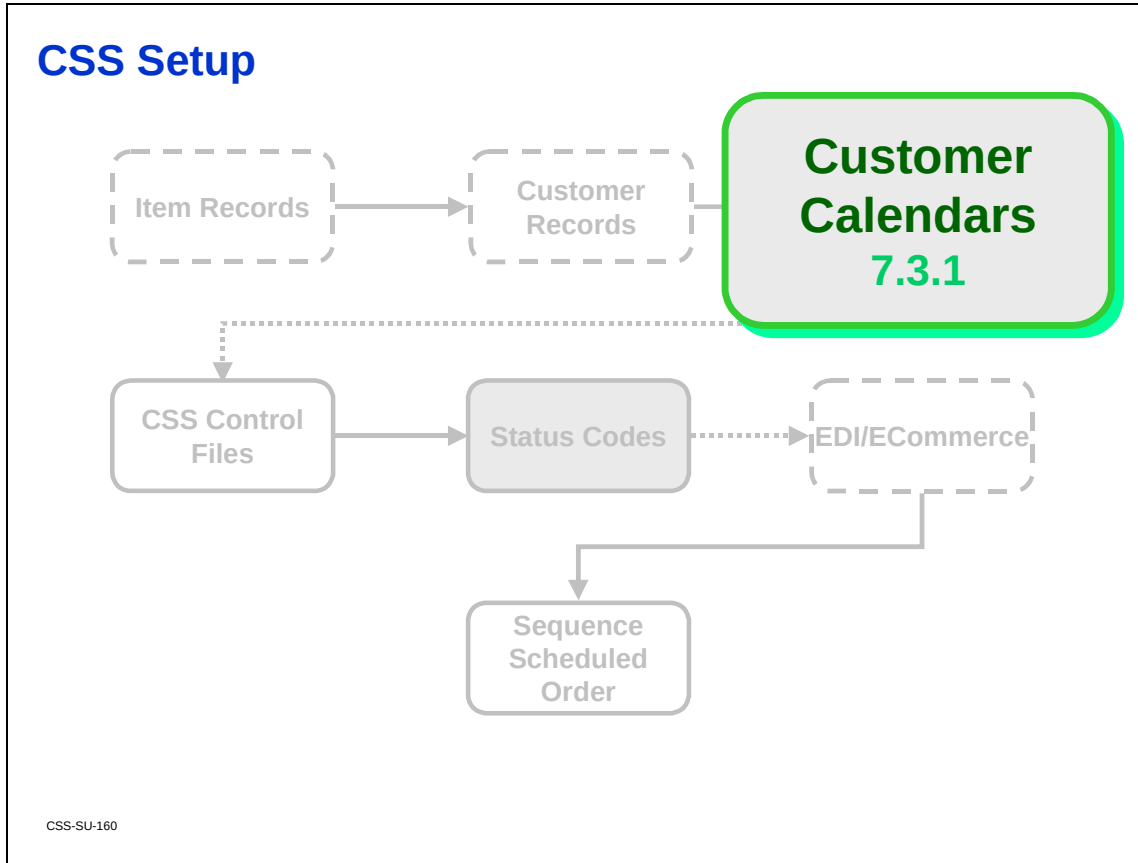
- 2 Advance to the Customer Ship-To frame and add the first ship-to location.

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

MFG/PRO 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

7.3.1 – Customer Calendar Maintenance

Work Day	Hours
Sunday: no	0.00
Monday: no	0.00
Tuesday: yes	8.00
Wednesday: yes	8.00
Thursday: yes	8.00
Friday: yes	8.00
Saturday: no	0.00

Operating Day Hour Exceptions

Reference:

Start: / /

End: Daily Hours:

Non-Operating Days

Date: / /

Description:

CSS-SU-170

Customer Calendar Maintenance

Menu Number 7.3.1

Use Customer Calendar Maintenance 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

Description: Each ship-to location needs a calendar.

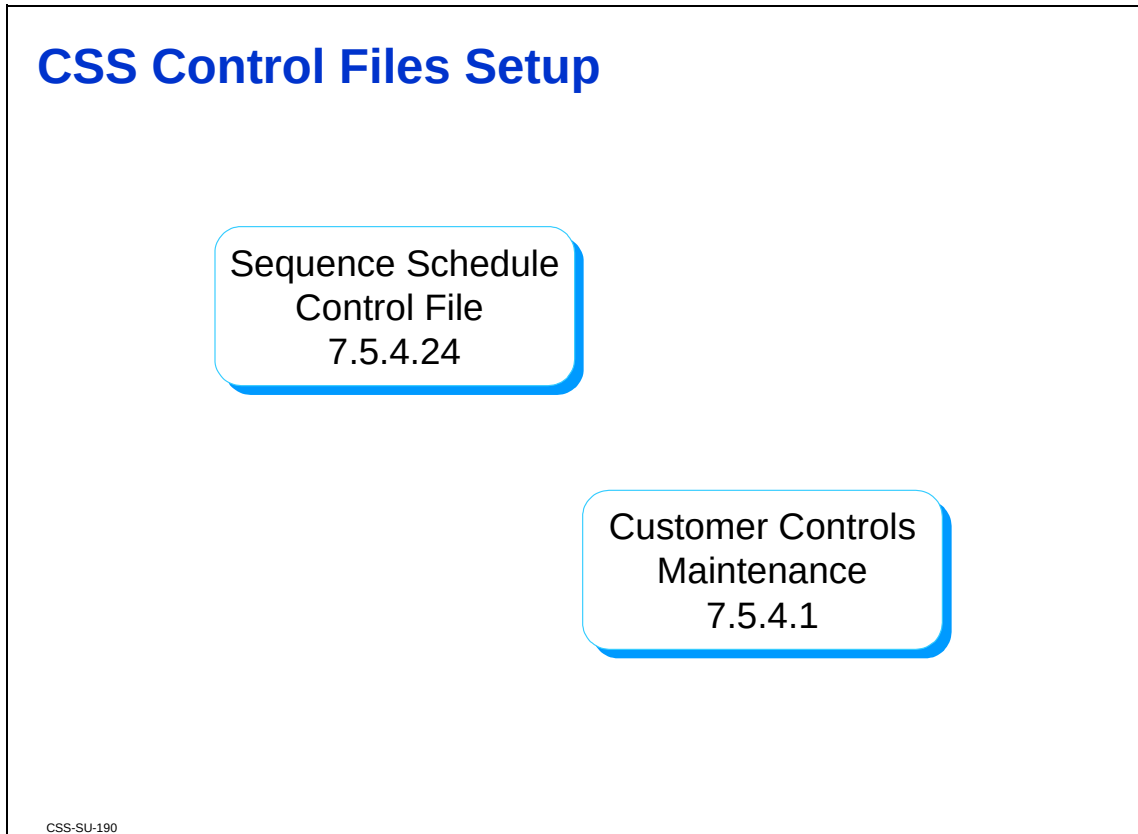
- 1 Create a calendar for the first plant by entering:

Field	Data
Customer/Ship-To	f001
<i>Use Customer Calendar Maintenance 7.3.1</i>	

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

Field	Data
Customer/Ship-To	f002

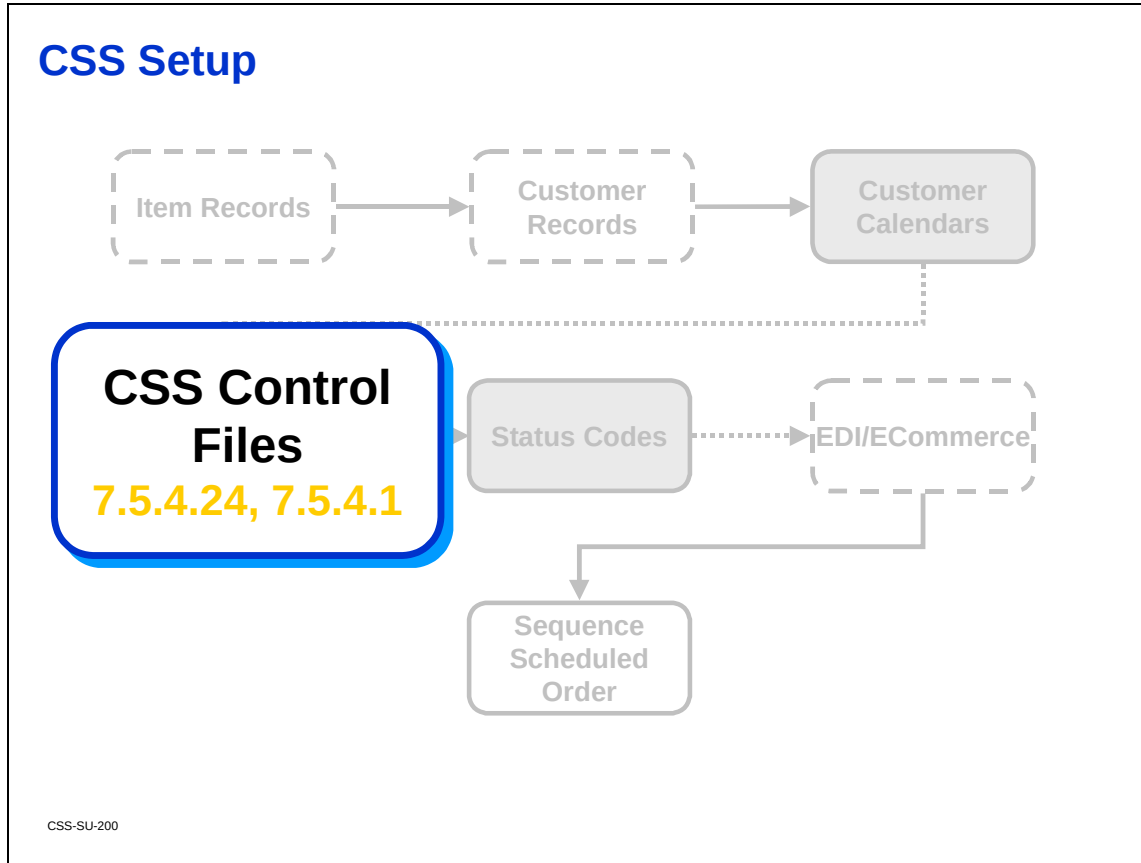




CSS Control Files Setup

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 CSS control parameters.

- Sequence Schedule Control File 7.5.4.24
 - Required
 - Enables CSS
 - 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



7.5.4.24 – Sequence Schedule Control File

Sequence Schedule Control File

User Menu Edit Queue Options Help

Enable Sequence Schedules: **yes**

Schedule Order Default: yes

Include Seq in Req Ship Sched: yes

Firm Days: 5

Packing Order: forward

Sequences Per Container: 0

Merge Schedules: no

Check Sequence Tolerance: yes

Maximum Tolerance: 2

Print Sequence Range on Shipper: yes

Print Sequence Range on Invoice: yes

Send Sequence with ASN: yes

Send Sequence with Invoice: yes

Set to Yes to Activate Sequence Schedules

F1=Help F2=Go ESC=End Ctrl-X=Cut Ctrl-C=Copy Ctrl-V=Paste

CSS-SU-210

Sequence Schedule Control File

Menu Number 7.5.4.24

Use Sequence Schedule Control File to enable CSS functionality and to set the system wide defaults.

Field Definitions

Enable Sequence Schedules

Determines if CSS is enabled.

- If Yes, CSS is enabled

- If No, CSS is not enabled

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

Schedule Order Default

Determines if the scheduled order contains sequence information.

- If Yes, scheduled order can be set up to contain sequence information
- If No, scheduled order will not be set up to contain sequence information

Value entered in this field defaults to the Sequenced field in Scheduled Order Maintenance 7.3.13.

- You can change this value for individual scheduled orders

Note The values entered in the following fields default to the corresponding fields in Customer Controls Maintenance 7.5.4.1 where they can be overridden for individual customers. Whenever a customer control record exists for an individual customer, that value overrides the system wide value.

Include Seq in Req Ship Sched

Determines if sequence delivery information is included when the RSS is generated.

- If Yes, sequence delivery information is included
- If No, sequence delivery information is not included

Value entered in this field defaults to the Include Seq In Req Ship Schedule field in Scheduled Order Maintenance.

Note Be aware that short term delivery schedules do not affect long lead time manufactured items and that this option only applies to shipping schedules.

Firm Days

Firm days are the number of work days from the sequence schedule that should be used to create the RSS for planning purposes. They give you the option of determining the duration of the sequence schedule for planning.

- Defaults to 0 (zero)
 - Tells the system to use the entire schedule to generate the RSS
- Applies only when Include Seq in Req Ship Sched is Yes.

Value entered in this field defaults to the Firm Days field in Scheduled Order Maintenance.

Using this option helps you to curtail lengthy schedules.

- For example, if you have 30 days of sequences, 5 days would be sufficient for planning
 - Firm Days would be 5

Note If you enter more days than are available on the sequence schedule, the system uses the maximum available days.

Packing Order

Indicates the sequential packing order for every item in a shipment Your options are:

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

Sequences Per Container

Determines the maximum number of sequences that can fit in a container (i.e., packing parameters).

- Defaults to 0
- Can be any positive number

Value entered in this field defaults to the Sequences Per Container field in Sequence Schedule Maintenance 7.5.4.5.

This value is used by Picklist/Pre-Shipper - Automatic 7.9.1 and Sequence Pre-Shipper - Automatic 7.5.4.10 to define logical breaks between multiple containers on the sequence picklist.

- Picklist displays breaks between containers
- Helps to visualize containers and contents
 - Loading dock personnel know how many sequences go in each container
- Used with standard containers
 - Customer uses uniform containers that can hold so many sequences
- A compromise for containerization

Merge Schedules

Gives you the ability to have the system take all unshipped sequences from the currently active schedule and merge (combine) them with the new incoming schedule during EDI or ECommerce document input.

- Allows the customer to send only additions and not re-send entire schedule

You have two options:

- If Yes, the incoming schedule is combined with the currently active schedule to create a new release containing the open requirements from both schedules
- If No, the incoming schedule becomes the active schedule
 - The open requirements from the previous release are not considered

Check Sequence Tolerance

Determines if you are using tolerance checking. Using the tolerance checking option gives you the ability to validate sequence numbers.

You have two options:

- If Yes, tolerance checking is turned on
 - System checks scheduled sequence numbers for gaps when you:
 - Import a sequence schedule
 - Manually add sequences to a schedule in Sequence Schedule Maintenance 7.5.4.5
 - System issues a warning if:
 - An alphanumeric sequence number is processed

Note System cannot check alphanumeric sequence range integrity.

- It detects numbering gaps greater than the value specified
- If No, tolerance checking is not turned on
 - Use when the environment uses alphanumeric sequence numbers

The system performs tolerance checking in:

- Sequence Schedule Maintenance 7.5.4.5
- Document Import 35.13
 - EDI
- Document Import 35.21.1
 - ECommerce

Maximum Tolerance

Specifies the maximum allowable size of the gap in consecutive sequence numbers on a schedule.

- Enter 0 (zero) to issue a warning whenever any gaps in sequence number are found

How the system uses this setting depends on the setting of the Check Sequence Tolerance field.

- If Check Sequence Tolerance is Yes, the system issues a warning when it detects numbering gaps greater than the Maximum Tolerance value
- If Check Sequence Tolerance is No, the system disregards the Maximum Tolerance field

Print Sequence Range on Shipper

Determines if the system prints the range of sequence numbers when printing shippers.

- If Yes, range of sequence numbers prints on the shipper
 - Prints immediately following the list of items being shipped
- If No, range of sequence numbers does not print on the shipper

Print Sequence Range on Invoice

Determines if the system prints the range of sequence numbers on the invoice.

- If Yes, range of sequence numbers prints on the invoice
 - Same range of sequence numbers as are printed on the shipper
- If No, sequence numbers do not print on the invoice

Send Sequence with ASN

Determines if sequences are included when transmitting the ASN using EDI or ECommerce.

- If Yes, sequences are included on the ASN
- If No, sequences are not included on the ASN

Send Sequence with Invoice

Determines if sequences are included when transmitting the invoice using EDI or ECommerce.

- If Yes, sequences are included on the invoice
- If No, sequences are not included on the invoice

Sequences Per Container Option: Example

Ship To: 01000036
Northwest Reliable
1000 B Street

S I M U L A T I O N
P I C K L I S T / P R E - S H I P P E R
S E Q U E N C E P A C K L I S T
Pre-Shipper: P00000289
Page: 2

Print Date: 02/01/00

Coos Bay
United States of America

Packing Order: forward
Sequences Per Container: 2

Customer Dock:
Line Feed:

Customer Job
Pack Customer Sequence

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

Container ()

Container ()

Separator

CSS-SU-220

Sequences Per Container Option

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 shows the 'Sequence Schedule Maintenance' window. At the top, it displays 'Ship-From: 10000 nj plant', 'Ship-To: 01000036 Northwest Reliable', 'Release ID: 1', and 'Active: yes'. Below this is the 'Sequence Detail Data' section with fields for Date (02/01/00), Time (10:00), Customer Job (20000201), Customer Sequence (100), Order (so2077), Line (1), UM (EA), Item Number (88-100), CASE_AUTO-UNIT, PO Number, Customer Reference (1R1234XYZ01X), Customer Dock, Line Feed, Picked (no), X-Ref (no), Quantity (0.0), Cum Quantity (0.0), Customer Item, Customer Build Date (/ /), Status, and Delete (no). A red box highlights a warning message at the bottom: 'WARNING: SEQUENCE TOLERANCE EXCEEDED. PRIOR SEQUENCE: 006. Adding new record.' A red arrow points from a text box on the right to this warning message.

System displays a warning message

WARNING: SEQUENCE TOLERANCE EXCEEDED. PRIOR SEQUENCE: 006.
Adding new record.

F1=Help F2=Go ESC=End *Next/Prev* Ctrl-X/C/V=Cut-Copy-Paste

CSS-SU-230

Tolerance Checking

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

Quality Products Inc.		P R E - S H I P P E R	
Div/Consolidated Corporation		Pre-Shipper ID: P00000288	
Suite 1, Consolidated Bldg.		Ship Date: 02/01/00	
One Consolidated Plaza		Print Date: 02/01/00	
San Diego, CA 92130		Page: 1	
United States of America			
Sold To: 01000036		Ship To: 01000036	
Northwest Reliable		Northwest Reliable	
1000 B Street		1000 B Street	
Coos Bay		Coos Bay	
United States of America		United States of America	
Ship Via:		Mode of Transport:	
FOB Point: ESCONDIDO		Carrier Shipment Ref: P00000288	
		Vehicle ID:	

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

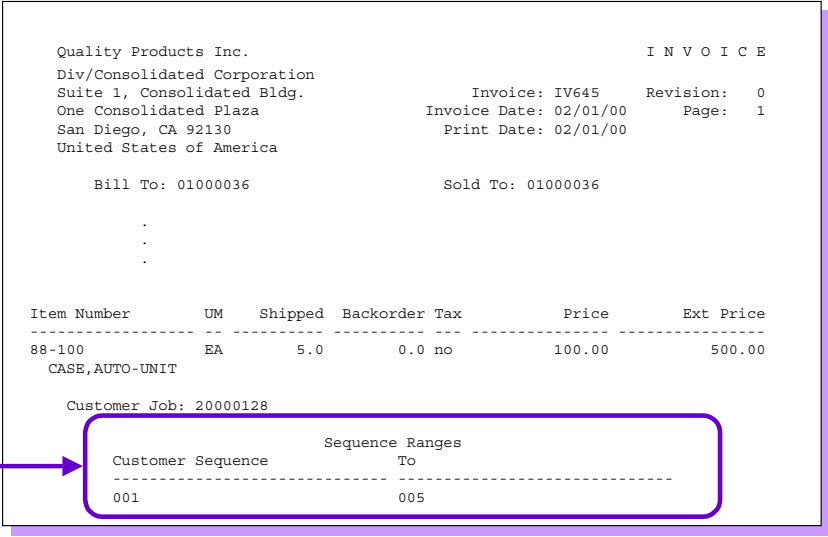
CSS-SU-240

Sequence Range on Pre-Shipper

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

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

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

I N V O I C E

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

Bill To: 01000036 Sold To: 01000036

.

.

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

Sequence Ranges

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

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

- 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

Use Sequence Schedule Control File 7.5.4.24

Exercises



7.5.4.1 – Customer Controls File

Customer Controls Maintenance

User Menu Edit Queue Options Help

Ship-To: 001 PEI Computers Ltd.

Include Seq in Req Ship Sched: ☒ yes

Firm Days: 5

Packing Order: forward

Sequences Per Container: 0

Merge Schedules: no

Check Sequence Tolerance: yes

Maximum Tolerance: 2

Print Sequence Range on Shipper: yes

Print Sequence Range on Invoice: yes

Send Sequence with ASN: yes

Send Sequence with Invoice: yes

Adding new record.

F1=Help F2=Go ESC=End F5=Delete Ctrl-X/C/V=Cut-Copy-Paste

Settings Only Apply To This Customer/Ship-To Address

CSS-SU-270

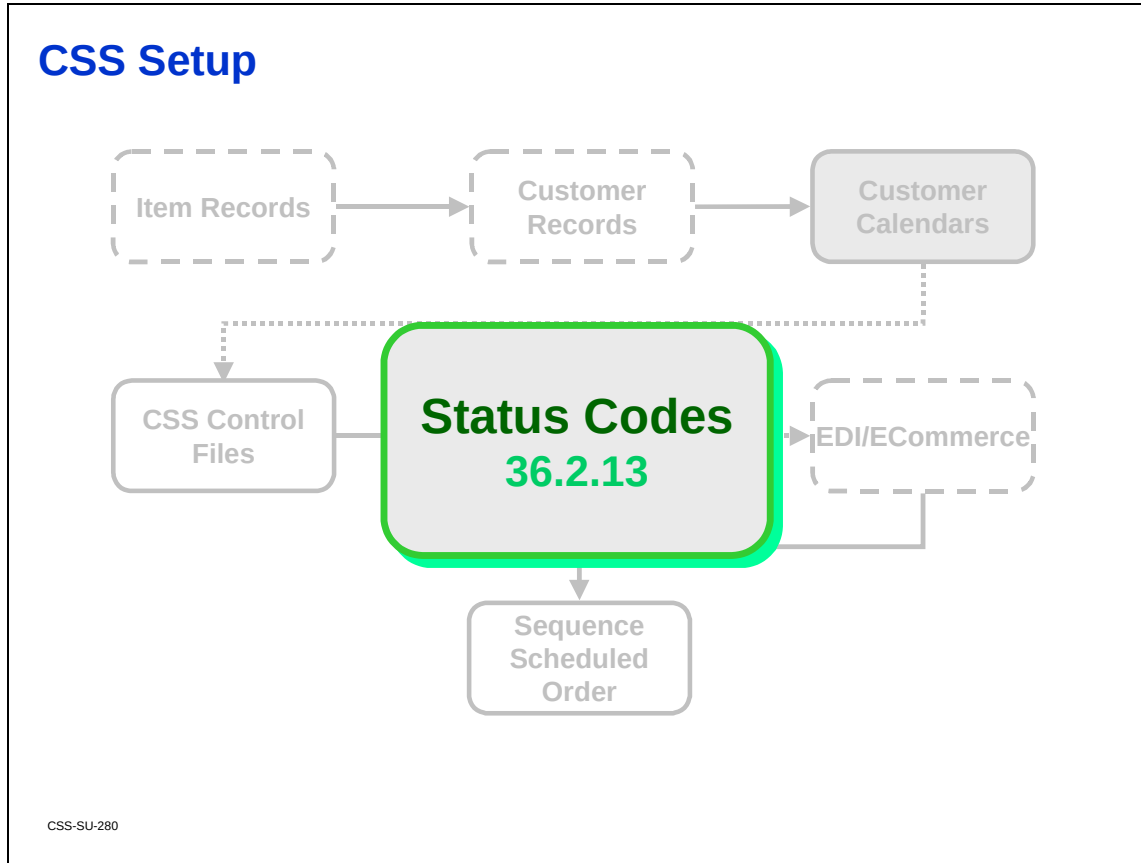
Customer Controls Maintenance

Menu Number 7.5.4.1

Use Customer Controls Maintenance 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

36.2.13 – Generalized Codes Maintenance

Generalized Codes Maintenance

User Menu Edit Queue Options Help

Field Name: rcsd_status

Value:

Comments: Sequence is off customer production line

F1=Help F2=Go ESC=End *Next/Prev* Ctrl-X/C/V=Cut-Copy-Paste

CSS-SU-290

Generalized Codes Maintenance

Menu Number 36.2.13

Use Generalized Codes Maintenance 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

Field Definitions*Field Name*

The field name to which the generalized code applies.

- Database field name
- Local variable defined in a PROGRESS program

Value

The value entered in the field specified by the field name.

Comments

Comments regarding the value.

- Optional

Exercise: Create Status Codes

Description: In the following exercises you need to use status codes.

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

Field	Data
Field Name	rcsd_status

Use Generalized Codes Maintenance 36.2.13

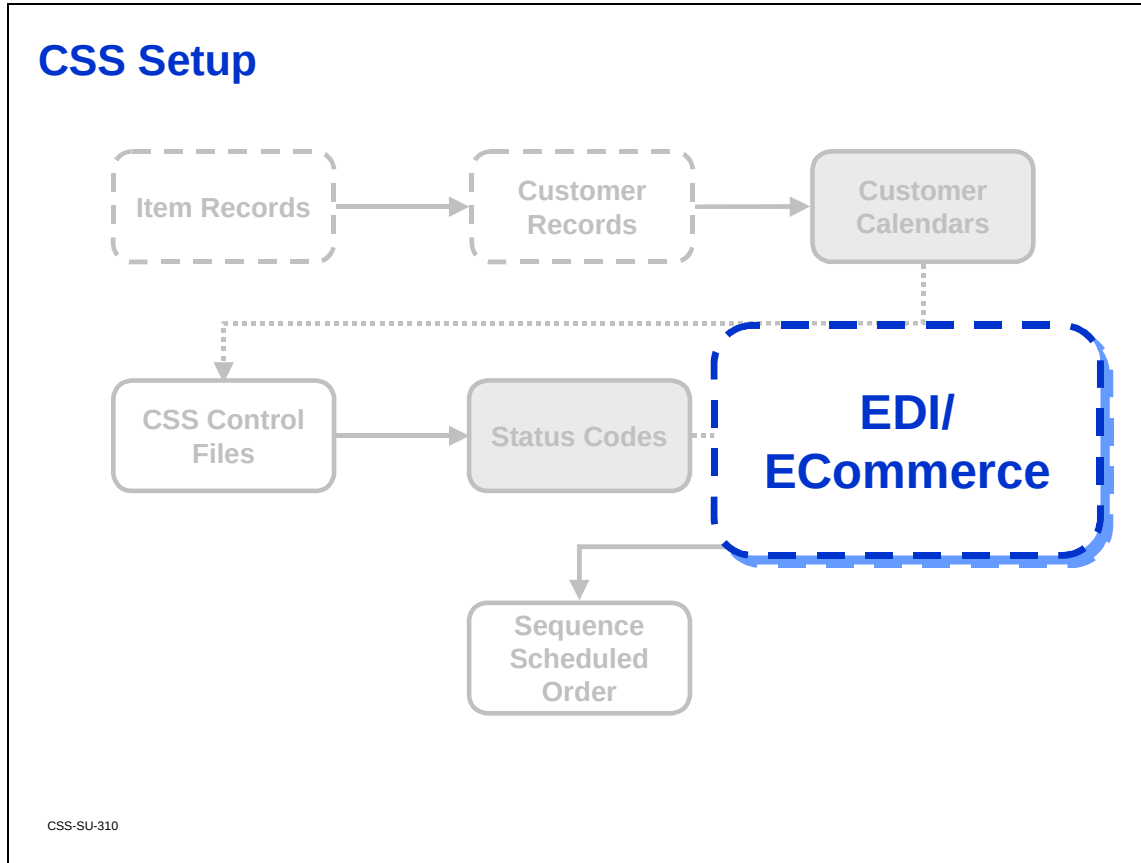
- 2 Create a second status code by entering:

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

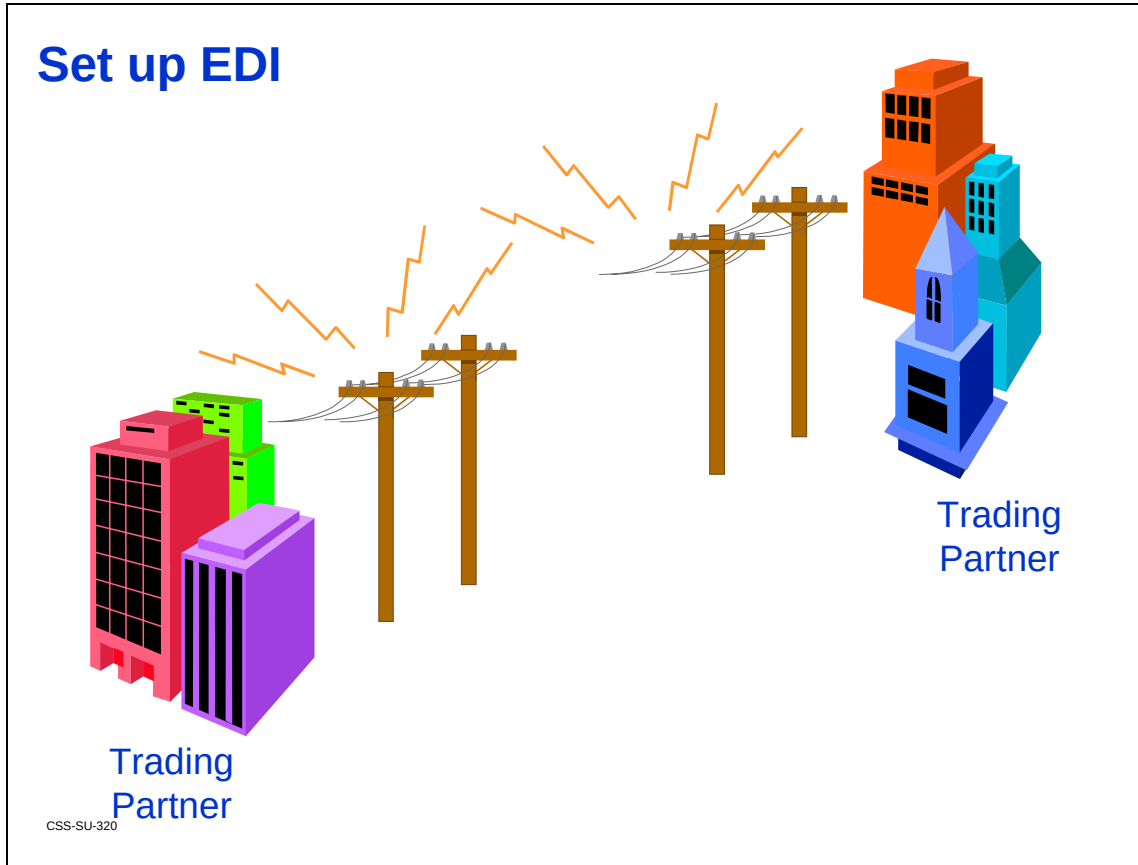
- 3 Create a third status code by entering:

Field	Data
Field Name	rcsd_status
Value	offline
Comments	Vehicle is offline





EDI/ECommerce



Set up EDI

You use the following functions to set up EDI data:

- EDI Control File 35.24
- Purpose Code Maintenance 35.3
- Trading Partner Parameters Maintenance 35.1
- Site Ship-from ID Maintenance 35.2



Discussed in the following Training Guide: Customer Schedules

35.24 – EDI Control File

EDI Control File

User Menu Edit Queue Options Help

Import from File or Process:

Import File/Process Name:

Export to File or Process:

Export Directory/Process Name:

Use Auto File Naming:

Export File Name:

Export Auto File Prefix:

Export Auto File Sequence:

System Automatically Names Export File

F1=Help F2=Go ESC=End Ctrl-X=Cut Ctrl-C=Copy Ctrl-V=Paste

CSS-SU-330

EDI Control File

Menu Number 35.24

Use EDI Control File to define where and how EDI document importing (receiving) and exporting (sending) occurs. You also have the option of automatically naming export files.

Exercise: Set EDI Parameters

Description: In the following exercises you will load the sequence schedule using EDI.

- 1 Set up the EDI parameters by entering the following:

Field	Data
Import from File or Process	File
Export to File or Process	File
Use Auto File Naming	Yes
Export Auto File Prefix	ed
Export Auto File Sequence	00001000

Use EDI Control File 35.24



35.3 – Purpose Code Maintenance

Purpose Code Maintenance

User Menu Edit Queue Options Help

Site:
 Address:
 EDI Standard Version:
 Transaction Set:
 I/O:
 Ext Purpose Code:

List Type:

Key Fields

Int Purpose Code:
 Execution File:
 Execution Parameter:
 Description:
 Comments:

Use to Provide Additional Information on Schedule Reports

F1=Help F2=Go ESC=End *Next/Prev* Ctrl-X/C/V=Cut-Copy-Paste

CSS-SU-350

Purpose Code Maintenance

Menu Number 35.3

Use Purpose Code Maintenance to define and maintain purpose code cross-references. Purpose code cross references are used to associate an external purpose code with the program used to process EDI transactions.

You can create cross-references using one or more of the following key fields:

- Site
- Address
 - Customer or customer's ship-to address

- EDI Standard Version
 - Version of EDI document received in the inbound document
- Transaction Set
 - EDI document upon which the cross-reference is based
- I/O
 - Determines if the purpose code is based on an inbound or outbound transaction
- External Purpose Code
 - Transaction set purpose code received in the inbound document

By using one or more of the key fields, you can create cross-references that range from very general to very specific. You can create any number of cross-references for an external purpose code.

35.1 – Trading Partner Parameters Maintenance

Trading Partner Parameters Maint

Address: 001 PEI Computers Ltd. List Type: customer

Trading Partner Interface ID:

Trading Partner EDI ID:

EDI Standard:

EDI Standard Level:

Reference Only

F1=Help F2=Go ESC=End *Next/Prev* Ctrl-X/C/V=Cut-Copy-Paste

CSS-SU-360

Trading Partner Parameters Maintenance

Menu Number 35.1

Use Trading Partner Parameters Maintenance to define the information required to exchange electronic business documents with your customers using EDI.

- These documents are electronic representations of standard MFG/PRO documents

Note This is not the same program you would use when defining data for use with the EDI ECommerce module. To define data for use with ECommerce, use Trading Partner Parameters Maintenance 35.21.13.7.

There are four frames. In the first frame you:

- Identify the customer by specifying the:
 - Code you use to identify them
 - Code they use to identify themselves in EDI communications
- Method used to format the documents
 - Optional
- Version of the EDI standard being used
 - Optional

35.1 – Export Document Control Frame

The screenshot shows a window titled "Trading Partner Parameters Maint". The main area contains the following information:

Address: 001 PEI Computers Ltd. List Type: customer

Trading Ptnr Interface ID:
Trading Ptnr EDI ID:
EDI Standard:
EDI Standard Level:

Export Document Control

Print Inv hist: ☒ yes	EDI Inv Hist: ☐ no
Print PO: ☒ yes	EDI PO: ☐ no
Print Schedules: ☒ yes	EDI Schedules: ☐ no
Fax Schedules: ☐ no	EDI ASNs: ☒ yes
	EDI PO Ack: ☐ no

At the bottom, a status bar displays: F1=Help F2=Go ESC=End *Next/Prev* Ctrl-X/C/V=Cut-Copy-Paste

CSS-SU-370

Export Document Control Frame

You use the Export Document Control frame to define the defaults used by the system for managing and transmitting EDI documents.

This is where you implement the trading policy you have with the trading partner (customer). Each field allows or disallows a type of document processing.

- For example, you would:
 - Select how you manage invoices internally (Print Inv hist)
 - Determine if you transmit invoices and ASNs by EDI (EDI Inv Hist, EDI ASNs)

35.1 – EDI Profile Data Frame

Trading Partner Parameters Maint

Address: 001 PEI Computers Ltd. List Type: customer

Trading Ptnr Interface ID:

Trading Ptnr EDI ID:

EDI Standard:

EDI Standard Level:

EDI Profile Data

Field ID	Label	Value

F1=Help F2=Go ESC=End *Next/Prev* Ctrl-X/C/V=Cut-Copy-Paste

CSS-SU-380

EDI Profile Data Frame

You use this frame to add data values that are made available to all export functions. These values can be unique to a particular trading partner or an EDI standard for shipment information.

- Optional

35.1 – ASN Header Data Frame

The screenshot shows a window titled "Trading Partner Parameters Maint" with a menu bar (User Menu, Edit, Queue, Options, Help) and a toolbar. The main area displays the following information:

Address: 001 PEI Computers Ltd. List Type: customer

Trading Prtnr Interface ID:

Trading Prtnr EDI ID:

EDI Standard:

EDI Standard Level:

Below this is a section titled "ASN Header Data" which contains a table with the following headers:

Field ID	Prompt Label	Prompt	Initial Value

At the bottom of the window, a status bar displays the following keyboard shortcuts: F1=Help F2=Go ESC=End *Next/Prev* Ctrl-X/C/V=Cut-Copy-Paste

CSS-SU-390

ASN Header Data Frame

This frame displays only if the EDI ASNs field is set to Yes. (Found in the Export Document Control frame.) It contains additional required ASN header fields.

- Information that is required by a customer or an EDI standard (e.g., having the system generate a prompt during ASN export)

Exercise: Trading Partner Parameters

Description: You need to identify the Fjord plants.

- 1 Set up the trading partner parameters for the first Fjord plant.

Field	Data
Address	f001
Trading Prtnr Interface ID	tpid-f001
Trading Prtnr EDI ID	f001

Use Trading Partner Parameters Maintenance 35.1

- 2 Advance to the Export Document Control frame.

Field	Data
EDI Schedules	Yes
EDI ASNs	Yes

- 3 Set up the trading partner parameters for the second Fjord plant.

Field	Data
Address	f002
Trading Prtnr Interface ID	tpid-f002
Trading Prtnr EDI ID	f002

- 4 Advance to the Export Document Control frame.

Field	Data
EDI Schedules	Yes
EDI ASNs	Yes

Exercises

35.2 – Site Ship-from ID Maintenance

Site Ship-from ID Maintenance

User Menu Edit Queue Options Help

Address: 3005000 Site: 10000 Worldwide Supplies San Diego Main Plant

Site Shipping Label ID: F7BFC Site EDI ID: F7BFC

Field ID	Label	Value
TD501	ID	12345

F1=Help F2=Go ESC=End F5=Delete Ctrl-X/C/V=Cut-Copy-Paste

CSS-SU-410

Site Ship-from ID Maintenance

Menu Number 35.2

Use Site Ship-from ID Maintenance to set up a cross-reference between your internal site code and a trading partner's ID for that site.

Field Definition

Address

A valid MFG/PRO customer address code or ship-to address code.

Site

MFG/PRO internal site which is the ship-from site.

Site Shipping Label ID

The identification assigned to the ship-from site by the trading partner. This is the trading partner's ID for the you. Shipping Label Print 7.6.5.8 prints this value on the shipping label.

Site EDI ID

The EDI identification code assigned to the ship-from site by the trading partner.

In the second frame you can add ASN header field values that are made available to all export functions.

Exercise: Site Ship-From ID

Description: The Fjord plants need to have ship-from IDs.

- 1 Create the Site Ship-from ID for the first plant.

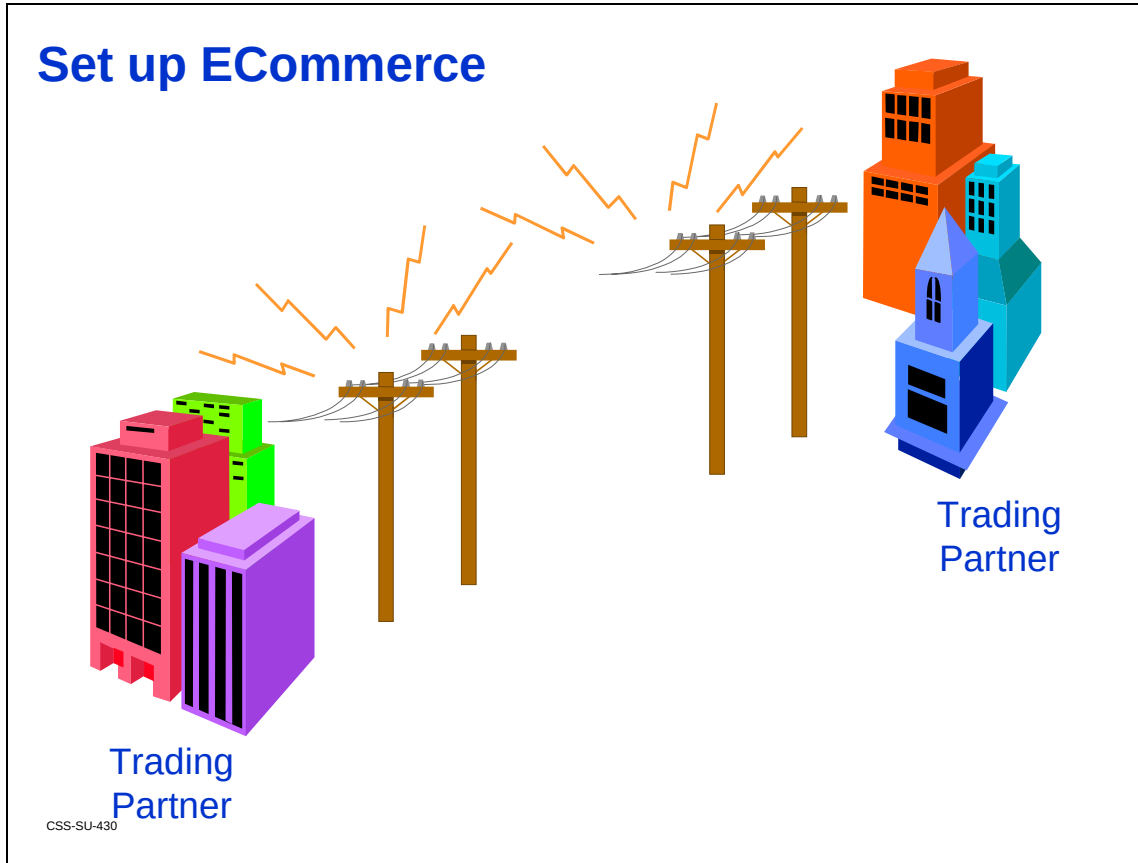
Field	Data
Address	f001
Site	10000
Site EDI ID	10000

Use Site Ship-from ID Maintenance 35.2

- 2 Create the Site Ship-from ID for the second plant.

Field	Data
Address	f002
Site	10000
Site EDI ID	10000





Set up ECommerce

You use the following functions to set up ECommerce data:

- Exchange Definition Maintenance 35.21.15.6
- MFG/PRO Definition Maintenance 35.21.15.10
- Implementation Definition Maintenance 35.21.15.13
- Transformation Definition Maintenance 35.21.15.17
- Trading Partner Maintenance 35.21.13.7
- Trading Partner Parameter Maintenance 35.21.13.10



Discussed in the following Training Guide: ECommerce

35.21.15.6 – Exchange Definition Maintenance

Seq	Record Name	Requirement	Loop Occurs	Loop Ends Seq	Fields
1	Header	Mandatory	1	99	
11	Header-Comments	Optional	20	11	
12	Header-Ext	Optional	1	12	
13	Address	Optional	20	13	
20	Ship-Deliver	Mandatory	20	75	
30	Item	Mandatory	99999	75	
31	Item-Comments	Optional	20	31	
32	Item-Ext	Optional	1	32	
40	Contact-Info	Optional	5	40	
45	Ship-Del-Pattern	Optional	1	45	
50	Forecast	Optional	99999	52	

F1=Help F2=Go ESC=End Page-Up/Down Line-Up/Down ENTER=Select

CSS-SU-440

Exchange Definition Maintenance

Menu Number 35.21.15.6

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

Note An exchange file defines documents communicated between EC subsystems and MFG/PRO.

Header Frame

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

- Cust-Seq-Sched

35.21.15.6 – Exchange File Field Record: Header Frame

Exchange Definition Maintenance

User MenuEditQueueOptionsHelp

Name: OrderVersion: 1Direction: In

Desc: EDI document for 850QAD

Exchange File Field Record: Header

Seq	Name	Reqd	Type	Min	Max	Token
1	PurposeCode	Optional	AN	1	2	
2	POType	Optional	AN	1	2	
3	PONumber	Mandatory	AN	1	22	tp-document-nbr
4	PODate	Optional	d	1	6	
5	POShipReqdDate	Optional	d	1	6	
6	PODelReqdDate	Optional	d	1	6	
7	POCancelDate	Optional	d	1	6	
8	BillTo	Optional	an	1	17	
9	ShipTo	Optional	an	1	17	
10	ShipFrom	Optional	AN	1	17	
11	CurrencyCode	Optional	AN	1	3	

F1=Help F2=Go ESC=End Page-Up/Down Line-Up/Down ENTER=Select

CSS-SU-450

Exchange File Field Record: Header Frame

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

35.21.15.10 – MFG/PRO Definition Maintenance

Seq	Record Name	Requirement	Loop Occurs	Loop Ends Seq	Fields
1	HDR	Mandatory	1	0	
2	HDR-EXT	Optional	1	0	
3	DET	Mandatory	999999	4	
4	DET-EXT	Optional	1	0	

CSS-SU-460

MFG/PRO Definition Maintenance

Menu Number 35.21.15.10

Use MFG/PRO Definition Maintenance to set up individual MFG/PRO template document definition.

- sequence-sch

35.21.15.13 – Implementation Definition Maintenance

Implementation Definition Maint

User Menu Edit Queue Options Help

Implementation Name: sequence-sch

MFG/PRO Name: sequence-schd

Direction: In Desc: 866 Schedule

Ver: 1

Ver: 1

QAD

Implementation File Records

Seq	Record Name	Requirement	Loop Occurs	Loop Ends Seq	Fields
1	HDR	Mandatory	1	0	
2	HDR-EXT	Optional	1	0	
3	DET	Mandatory	999999	4	
4	DET-EXT	Optional	1	0	

F1=Help F2=Go ESC=End Page-Up/Down Line-Up/Down ENTER=Select

CSS-SU-470

Implementation Definition Maintenance

Menu Number 35.21.15.13

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

- sequence-sch

35.21.15.17 – Transformation Definition Maintenance

Transformation Definition Maint

User Menu Edit Queue Options Help

Transformation: **basic-866**

Exchange File: cust-seq-sched Ver: 1 Direction: In

MFG/PRO: sequence-schd Ver: 1 Can Run: yes

Implementation: sequence-schd Ver: 1 Debug level: 0

Many to Many: no

Record Name	Ev	Seq	EQ	TQ	Target	Type	SQ	Source
Header	RE	10	E	I	Header	Read		
Header	RE	30	E	O	HDR.tp_shipto	Equat	I	Header.TPSHIP
Header	RE	40	E	O	HDR.tp_shipfrom	Equat	I	Header.TPSHIPF
Header	RE	50	E	O	HDR.release_id	Equat	I	Header.Release
Header	RE	60	E	O	HDR.so_cumula	Equat	I	Header.SchdQty
Header	RE	70	E	O	HDR.date_type	Equat	I	Header.SchdTyr
Header	RE	80	E	O	HDR.purpose_c	Equat	I	Header.Purpose
Header	RE	90	E	O	HDR.create_tim	Equat	F	system
Header	RE	100	E			If	F	isblank
Header	RE	110	E	O	HDR.create_dat	Equat	F	SysDate

F1=Help F2=Go ESC=End Ins=Add F5=Delete

CSS-SU-480

Transformation Definition Maintenance

Menu Number 35.21.15.17

Use Transformation Definition Maintenance to define the maps needed to convert between exchange file data and MFG/PRO data.

- basic-866

35.21.13.7 – Trading Partner Maintenance

Trading Partner Maintenance

User Menu Edit Queue Options Help

TP ID: ABCD998877665 Name: Demo Trading Partner

Doc Type	Dir	Document Map	Transmission group	Fields
850	In	basic-850	In_Orders	yes

F1=Help F2=Go ESC=End F5=Delete Ctrl-X/C/V=Cut-Copy-Paste

CSS-SU-490

Trading Partner Maintenance

Menu Number 35.21.13.7

Use Trading Partner Maintenance to:

- Identify the document types that are exchanged with each trading partner
- Set up cross-references between trading partner documents and MFG/PRO
- Cross-reference the trading partner's site and address codes to the codes used in MFG/PRO

35.21.13.10 – Trading Partner Parameter Maintenance

	Logical Param Desc	Logical Param Value
01.	Send EDI ASN's	no
02.	Send EDI Invoices	yes
03.	Send EDI PO Ack	no
04.	Send EDI Plan Schedules	no
05.	Send EDI Ship Schedules	no
06.	Send EDI PO	no
07.		no
08.		no
09.		no
10.		no

F1=Help F2=Go ESC=End F5=Delete Ctrl-X/C/V=Cut-Copy-Paste

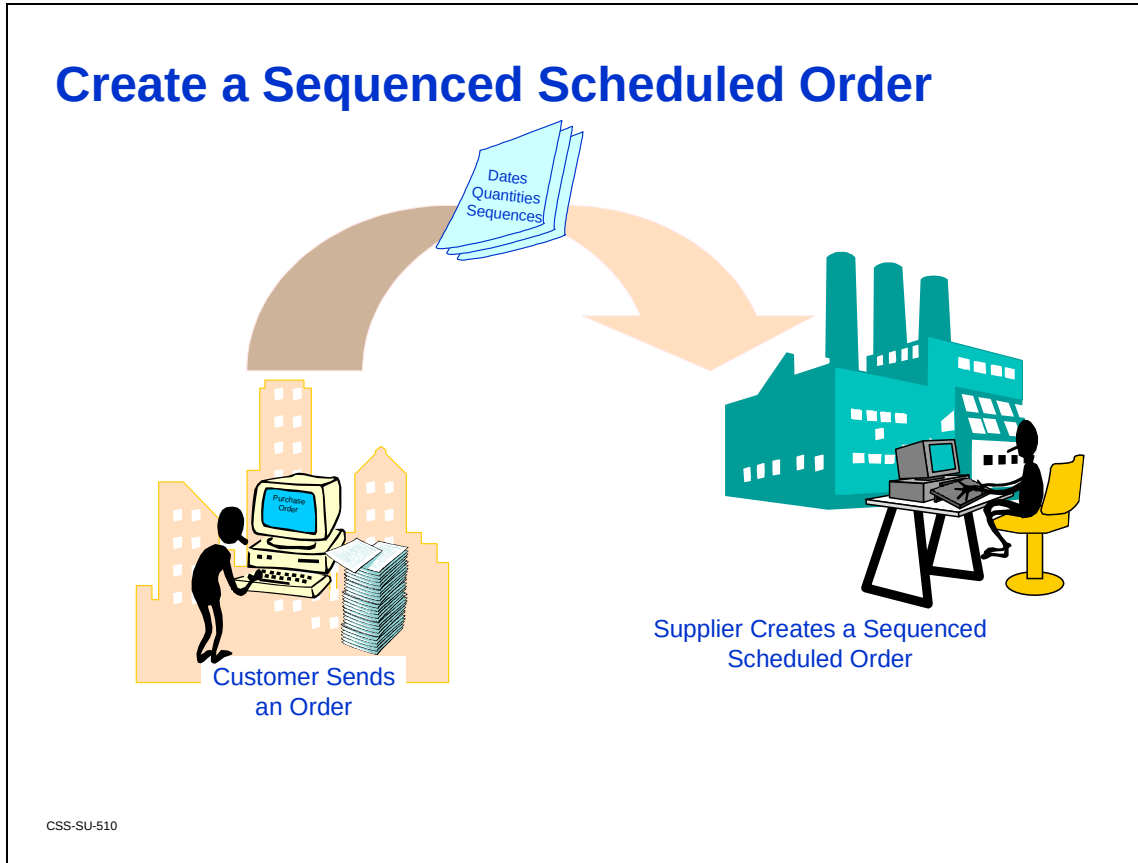
CSS-SU-500

Trading Partner Parameter Maintenance

Menu Number 35.21.13.10

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

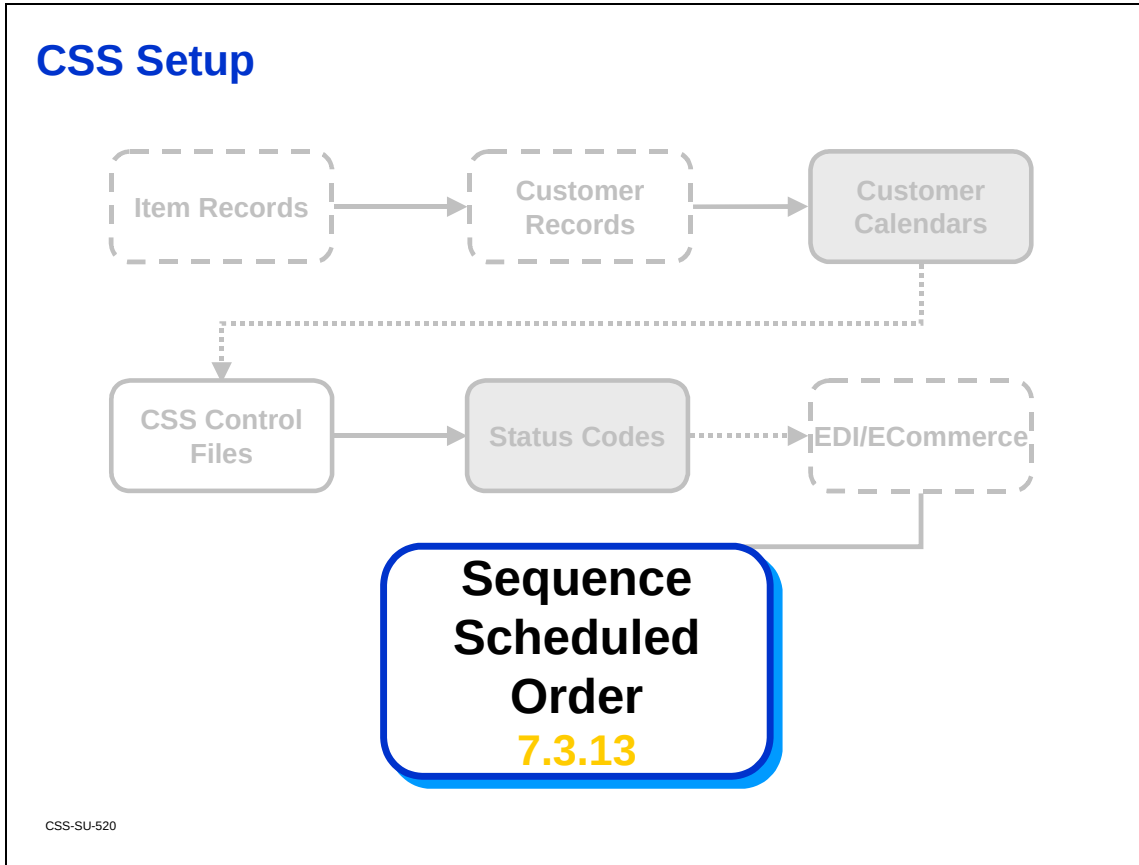
Note This is not the same program as Trading Partner Parameters Maintenance 35.1, which is used in the standard EDI functionality in MFG/PRO.



Create Sequence Schedule Order

You are now ready to create a sequenced scheduled order for your customer. To do this, you 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



7.3.13 – Scheduled Order Maintenance

The screenshot shows the 'Scheduled Order Maintenance' window. At the top, it displays 'Ship-From: train' and 'Ship-To: 1005000' on the left, and 'Order: bp500' and 'Universal Industries' on the right. Below this is the 'Order Data' section. A callout points to the 'Transport Days' field, which is set to '0.00', with the text 'Determines the Transport Lead Time'. Another callout points to the 'Sequenced' field, which is set to 'no', with the text 'Yes Indicates This is a Sequence Scheduled Order'. The 'Order Data' section includes various fields for account, taxability, week offset, cumulative, consignment, bill-to, auto inventory post, import/export, and sequencing. It also includes shipping options like 'Ship Via: GROUND', 'FOB Point: Shipping Point', and 'Include Saturday/Sunday: yes'. Other fields include 'Print Inv Hist: yes', 'EDI Inv Hist: no', 'Print Pack List: yes', 'Comments: no', 'AR Site: train', 'Channel:', 'Ship to Cum/Req: Cum', and 'Currency: USD'. At the bottom, there is a status bar with keyboard shortcuts: 'F1=Help F2=Go ESC=End *Next/Prev* Ctrl-X/C/V=Cut-Copy-Paste'.

CSS-SU-530

Scheduled Order Maintenance

Menu Number 7.3.13

Use Scheduled Order Maintenance 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

Field Definitions*AR Account*

General Ledger (GL) account code used to track AR amounts for this scheduled order.

- Defaults from the AR account associated with the customer's bill-to address, if specified
- If there was no bill-to address specified, defaults to the customer's sold-to address

Taxable

Determines if the items on the scheduled order are subject to tax

- If Yes, the items are subject to tax
 - Defaults to the customer's ship-to address if specified
- If No, the items are not subject to tax

Week Offset

Use to set the weekly starting date of the scheduled order to match the customer's work week. Bucketing requirements are allocated using this value.

- Defaults to 0 (zero), Monday. (Monday is 0 [zero], Tuesday is 1, etc.)
 - For example, if your customer's work week starts on Tuesday, set the week offset to 1

Cumulative

Indicates if the quantities in the schedule are stated in cumulative terms.

- If Yes, all quantities are entered as cumulative
 - The discrete quantity is added to the cumulative quantity of the previous requirement
- If No, all quantities are entered as net

Bill-To

The address code of the customer's bill-to address.

- Defaults to the customer's sold-to address if a bill-to address was not specified in Customer Maintenance

Auto Inv(oice) Post

Determines if the invoice automatically posts at the time of shipper confirmation (Pre-Shipper/Shipper Confirm 7.9.5). Defaults from the Customer Schedules Control File 7.3.24.

- If Yes, system automatic posts invoice during shipper confirmation
 - Posts to the Accounts Receivable account specified in Customer Maintenance 2.1.1

- If No, system does not automatically post invoices during shipper confirmation
 - You must post them manually using Invoice Post 7.13.4

Imp/Exp

Determines if import/export data is maintained for the order.

- If Yes, you are able to enter or maintain import/export data for the order
- If No, you are not able to enter or maintain import/export data for the order

Note If European Intrastat statistics are required for this order, denoting the movement of goods within the EU, this field must be set to Yes. The Intrastat Control File 2.22.24 and valid inputs for Despatch, Country of origin on the bill-to/sold-to and ship-to etc., must also be set up.

Sequenced

Indicates that this is a sequenced scheduled order.

- If Yes, this scheduled order does include sequences
 - Sequence Delivery Data frame appears for planning parameters
- If No, this scheduled order does not include sequences

Note You must set Enable Sequence Schedules to Yes in the Sequence Schedule Control File 7.5.4.24 before you can modify the Sequenced field.

Dynamic Unpeg

Determines if dynamic de-allocation is initiated or not. If initiated, affects the open quantity by letting pegged requirement quantities on unconfirmed shippers or pre-shippers for the same order line number be included in the calculation.

- If Yes, Picklist/PreShipper - Automatic 7.9.1 removes pegging information from any existing unconfirmed shippers or pre-shippers before building new pre-shippers
- If No, new pre-shippers are built using open demand not already pegged to other shippers or pre-shippers

Entered By

The initials of the user entering the scheduled order.

- Display only

Ship Via

Indicates the carrier normally used between the ship-from site and the customer.

- Can validate using generalized codes set up in Generalized Codes Maintenance 36.2.13

FOB Point

The point at which the ownership of the goods transfers to the customer.

- For example, FOB Destination means that ownership transfers at the point of delivery
- Can validate using generalized codes set up in Generalized Codes Maintenance 36.2.13
- If Auto Invoice is set to Yes, system picks up the FOB Point from this entry

Transport Days

The number of days needed to transport the goods from the ship-from site to the customer.

- Use if you are calculating the shipping schedule
- Acts like a lead time

Note Programs that create or update the RSS consider lead times when calculating the delivery/ship dates.

Print Inv Hist

Determines if an invoice history record created by this order can be printed using Closed Invoice Reprint 7.13.12.

- If you are using EDI or ECommerce, and you set this field to Yes, you can print the invoice in addition to exporting it electronically

EDI Inv Hist

Determines if the invoice history record created for this order can be transmitted via EDI or ECommerce using Invoice Export 35.8.

- If Yes, EDI or ECommerce is enabled

Print Pack List

Determines if you can print a packing list/picklist for this order.

Note There are other factors which can prevent a packing list from being printed. Factors such as partial shipments being set to No, if the order line is not confirmed, if there is a requirement for allocated quantities, or if the customer has an active status of hold due to a credit problem.

Comments

Set to Yes if you wish to make comments or notes about this scheduled order.

- Comments made here print out below the order header, but above the line items

AR Site

Site where the sales order or invoice was generated.

- Use in centralized sales model to identify accounts receivable and sales site
- For example, the manufacturing site dispatches the goods, but a central headquarters site deals with the commercial side of the contract
 - This gives the customer a central point of contact for a number of different ship-from sites

Ship to Cum/Req

- Cum(ulative) indicates this is a cumulative schedule
- Req(uirement) indicates this is a noncumulative (i.e., net) schedule
 - If Req, the Non-Cumulative Quantity Account Data frame displays

Currency

The currency being used for the scheduled order.



Discussed in the following Training Guide: Customer Schedules

7.3.13 – Scheduled Order Maintenance: Sequence Delivery Data Frame

The screenshot shows a window titled "Scheduled Order Maintenance" with a menu bar (User Menu, Edit, Queue, Options, Help) and a toolbar. The main area displays order information: Ship-From: 10000, Ship-To: 01000036, Order: so2077, and Northwest Reliable. Below this is a "Sequenced Delivery Data" frame, which is highlighted with a blue border. Inside this frame, there are two fields: "Include Seq in Req Ship Sched:" with a dropdown menu set to "yes", and "Firm Days:" with a text box containing "0". At the bottom of the window, a status bar displays keyboard shortcuts: F1=Help, F2=Go, ESC=End, *Next/Prev*, and Ctrl-X/C/V=Cut-Copy-Paste.

CSS-SU-540

Sequence Delivery Data Frame

Use the Sequence Delivery Data frame to set the planning parameters.

Field Definitions

Include Seq in Req Ship Sched

Determines if sequence information is included when the RSS is generated. Value defaults from:

- Sequence Schedule Control File, or
- Customer Controls Maintenance, if available

Firm Days

Specify the number of Firm days.

- Used when the Include Seq in Req Ship Sched is set to Yes
- Duration of schedule for RSS update

Value defaults from:

- Sequence Schedule Control File, or
- Customer Controls Maintenance, if available

7.3.13 – Scheduled Order Maintenance: Tax Data Frame

Scheduled Order Maintenance

User Menu Edit Queue Options Help

Ship-From: train Order: bp500
Ship-To: 1005000 Universal Industries

Order Data

AR Account: 1200 Ship Via: GROUND
Taxable: no FOB Point: Shipping Point
Week Offset: 0

Tax Data Frame (highlighted):

Tax Usage:	5-S-RSL	00
Tax Environment:	USA/USA	\$
Tax Class:		\$
Taxable:	no	\$
Tax In:	no	\$

Cumulative: no
Consignment: no
Bill-To: 10050
Auto Inv Post: yes
Imp/Exp: no
Sequenced: no
Dynamic UnPeg: no
Entered By: bap

AR Site: train
Channel:
Ship to Cum/Req: Cum
Currency: USD

WARNING: No tax environment found. Using default.

F1=Help F2=Go ESC=End *Next/Prev* Ctrl-X/C/V=Cut-Copy-Paste

CSS-SU-550

Tax Data Frame

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

7.3.13 – Scheduled Order Maintenance: Line Item Data Frame

The screenshot shows the 'Scheduled Order Maintenance' window. At the top, there is a menu bar with 'User Menu', 'Edit', 'Queue', 'Options', and 'Help'. Below the menu bar, there are several icons. The main area is divided into sections. The top section contains 'Ship-From: train', 'Ship-To: 1005000', 'Order: bp500', and 'Universal Industries'. Below this is a green-bordered box containing 'Item: 02-0005', 'MECHANICAL PENCIL', 'UM: EA', 'PD Number:', and 'Line: 1'. The 'Order Line Item Data' section contains various input fields: 'Disc Tbl:', 'List Price: 2.50', 'Net Price: 2.50', 'Sales Acct: 3000', 'Disc Acct: 3905', 'Consume Forecast: yes', 'Type:', 'Location: 200', 'Taxable: no', and two '0100' entries. At the bottom, there is a status bar with 'Adding new record' and a keyboard shortcut legend: 'F1=Help F2=Go ESC=End F5=Delete Ctrl-X/C/V=Cut-Copy-Paste'.

CSS-SU-560

Line Item Data Frame

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 assigned

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

7.3.13 – Order Line Item Data: First Frame

The screenshot shows the 'Scheduled Order Maintenance' window. The 'Order Line Item Data' frame is highlighted with a red border. The data entered in the frame is as follows:

Ship-From:	train	Order:	bp500
Ship-To:	1005000		Universal Industries
Item:	02-0005		MECHANICAL PENCIL
PD Number:		UM:	EA
		Line:	1

Order Line Item Data

Disc Tbl:		Consume Forecast:	yes
List Price:	2.50	Type:	
Net Price:	2.50	Location:	200
Sales Acct:	3000	Taxable:	no
Disc Acct:	3905		

Adding new record

F1=Help F2=Go ESC=End F5=Delete Ctrl-X/C/V=Cut-Copy-Paste

CSS-SU-570

First Order Line Item Data Frame

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

Field Definitions

Disc Tbl

- The price list to use in pricing this item

Note Customer schedules only use the “P” type price list.

List Price

- The unit price before applicable discounts or mark-ups are applied

Net Price

- The price the customer pays for the item
 - Updated once the shipper is confirmed
 - If the price is different at the time of shipment (determined by the start and end effective dates of the price list), this field is updated at the time of shipment

Sales Acct

- The GL account used to track the sales amount for this line item

Disc Acct

- The GL account used to track discounts for this line item

Consume Forecast

Use to specify if quantities in the active RSS should consume available forecast.

- If you use the forecasting module to give early warning of future plant load (beyond the schedule horizons), you may want the actual RSS to consume the predicted load
 - If the schedule you are creating forms part of that forecast, then set to Yes, or you will have double-counted the load
- If this schedule order has not been predicted, and forms additional load, set to No

Type

Determines if shipments of this item are to affect inventory.

- If left blank, line item is to be shipped from inventory
- If any value other than blank (e.g., M for Memo, D for Drop Shipments), shipment does not affect inventory
- Can validate using generalized codes set up in Generalized Codes Maintenance 36.2.13

Location

- Location where this line item is stored in inventory
 - Defaults from Item Master

Taxable

Indicates if this item is taxable (Yes) or not (No).

- An item can have a different taxable status from other items on the order

7.3.13 – Order Line Item Data: Second Frame

Connection with Firm Days

RSS = Seq/Ship/Plan

1/3 - Mon/Wed/Fri

Plan SDP Code:

Netting Logic:

Cum Start: 01/28/00

Comments: no

F1=Help F2=Go ESC=End Ctrl-X=Cut Ctrl-C=Copy Ctrl-V=Paste

CSS-SU-580

Order Line Item Data Frame

Field Definitions

Req Sched Days/Weeks/Months

- If the Req Sched Days value is less than the Firm Days value, then the RSS combines the sequence requirements
- Seen by MRP
 - Scheduled order data bucketed according to the rules you set up here
- Setting to zero (0) maintains customer's date and quantity requirements
 - The raw customer data is transferred into the MRP process

- Set to zero (0) if using noncumulative accounting procedures and pegging requirements through authorization numbers
- Used to bucket requirements for the supplier at the time the schedule release is transmitted.
 - Daily requirements appear as discrete quantities on discrete dates, including any intraday requirements and times
 - Weekly requirements are bucketed into weekly quantities with a delivery date of Monday
 - Monthly requirements are bucketed into monthly quantities with a delivery date of the first Monday of the month

Fab Auth Days/Raw Auth Days

The number of days the customer agrees to cover you for the manufacturing or ordering of the raw materials used in the manufacture of the ordered item.

- Normally a contractually agreed set of time
- When you first set up the scheduled order, these are usually left at zero (0) until a steady state of supply and demand exists
- Raw quantity is the quantity of product for which the customer commits to cover component costs
- Fab quantity is the quantity of product for which the customer commits to cover manufacturing costs

Customer Item

Customer's internal item number.

- Appears on the ASNs and invoices
- Must be set up using Customer Item Maintenance 1.16

Container Item

The item number of the normal or primary container used to ship this item.

- If using, the item number must be an existing item number in the Item Master file

Alternates

Determines if the item can be shipped in a container other than the primary container.

- If Yes, a pop-up window appears allowing you to enter alternate container item numbers
- If No, only the primary container item is allowed

Dock

Customer's dock address.

- If using, the dock address must be set up in Dock Maintenance 7.3.6
- Items will be delivered to this ship-to location

Start Effective/End Effective

The beginning and ending dates defining the period of time you and your customer have agreed for you to supply the item.

- For example, you may have to deliver to a different dock or location for a set period of time
 - Also, some customers prefer to make a new scheduled order after a certain period of time, allowing them to close off the schedule order and account against it

Max Order Qty

Determines the maximum quantity of the item to be shipped.

- Some customers may want to renew a scheduled order after a certain limit has been reached
- If specified, when the quantity has been exceeded, system displays warning messages at order updates, maintenance functions, inquiries, and reports

Std Pack

Multiple in which orders for this item are to be shipped (e.g., 5, 10, 12).

- Schedule update rounds order quantities up to this number
- Often related to the container being used to ship the item

Plan SDP Code/Ship SDP Code

A code specifying the default ship/delivery pattern. Indicates the days of the week or month that shipments or deliveries are required. Required Ship Schedule Update 7.5.5 uses this code to determine the due dates for shipping the order.

The SDP codes can be different for shipping and planning schedules.

- If you do not use planning schedules, leave both fields blank to avoid any rescheduling of the planning dates
- Ship schedule is rescheduled based on your shipping days

Codes support both ODETTE and Automotive Industry Action Group (AIAG) ship/delivery patterns.

- Translated to the appropriate industry standard code during EDI conversion and transmission

- If you use them, then requirements are bucketed
- If you do not use them, then weekly requirements could be dropped

Netting Logic

Netting logic affects scheduled orders and sequence scheduled orders differently. The system uses netting logic to determine how to calculate the RSS. There are four options for sequenced scheduled orders:

- Option 1 – sequence and shipping schedule are used
 - Short-term planning
- Option 2 – sequence and planning schedule are used
 - Long-term planning
- Option 3 – combines sequence, planning, and shipping schedule, with the shipping schedule taking precedence in the interval the 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

Cum Start

Date on which shipment quantities start to accumulate.

- Defaults to the current date
- Date you and your customer have agreed upon

Comments

Set to Yes if you wish to make comments or notes about this line item.

- Comments made here print out below each line item

Exercise: Create Scheduled Order – Explorer Assembly Plant

Description: You are now ready to create a Scheduled Order

- 1 Create a scheduled order.

Field	Data
Ship-From	10000
Ship-To	f001
Order	so100

Use Scheduled Order Maintenance 7.3.13

- 2 Advance to the Order Data frame and enter:

Field	Data
Sequenced	Yes

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

Field	Data
Include 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

Exercises



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

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
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

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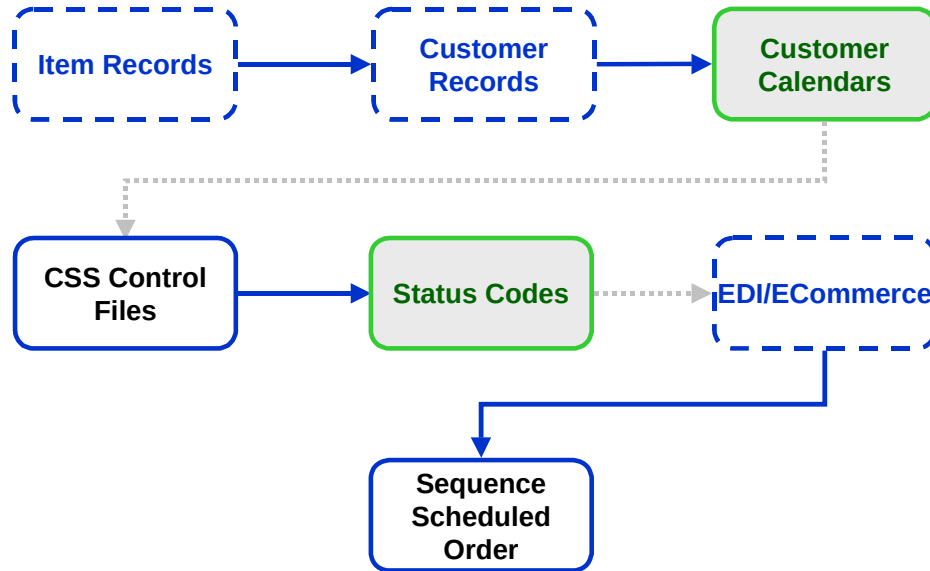
12 Return to the line item frame. You are going to create a fifth line, for part5.

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

CSS Setup Summary



CSS-SU-600



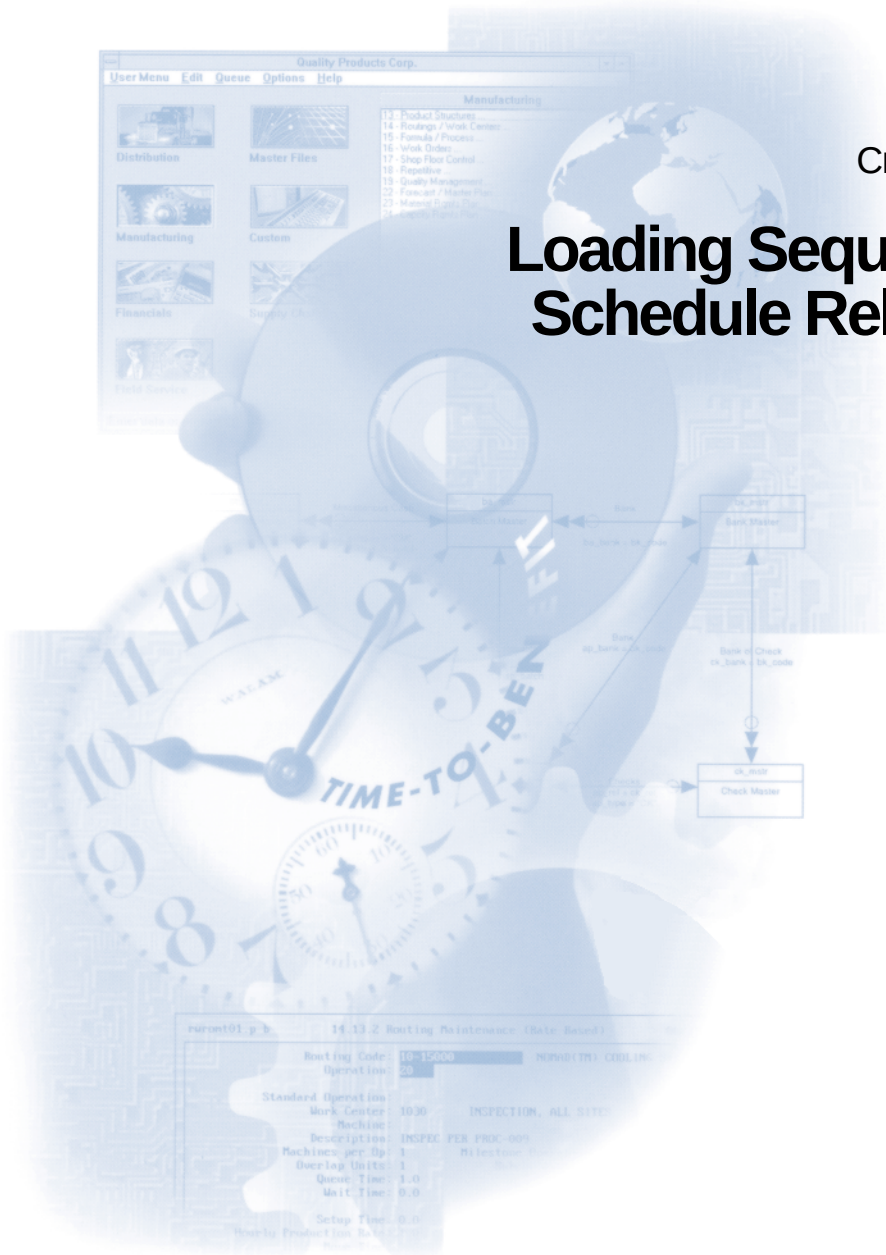
Course Overview

- ✓ Introduction to Customer Sequence Schedules
- ✓ Business Considerations
- ✓ Set up Customer Sequence Schedules
 - ◆ Load Customer Sequence Schedules
 - ◆ Plan Customer Sequence Schedules
 - ◆ Ship Customer Sequence Schedules
 - ◆ Customer Sequence Schedules Features and Options

CSS-SU-610

CHAPTER 4

Loading Sequence Schedule Release





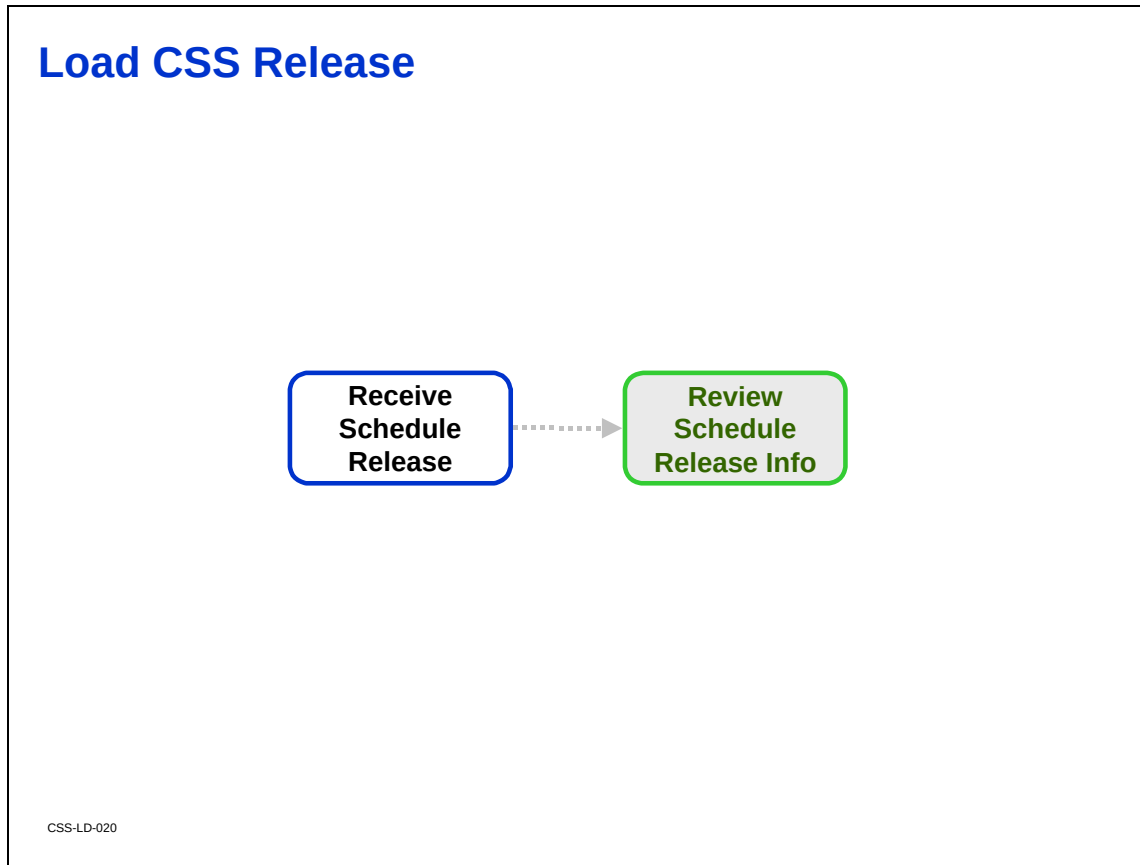
Load CSS Release

In this section you learn how to:

- ✓ Identify some key business considerations before setting up CSS in MFG/PRO
- ✓ Set up CSS in MFG/PRO
- ✓ **Loading CSS in MFG/PRO**
 - ♦ Planning CSS in MFG/PRO
 - ♦ Shipping CSS in MFG/PRO
 - ♦ CSS Features and Options

CSS-LD-010

Load CSS Release



Load CSS Release

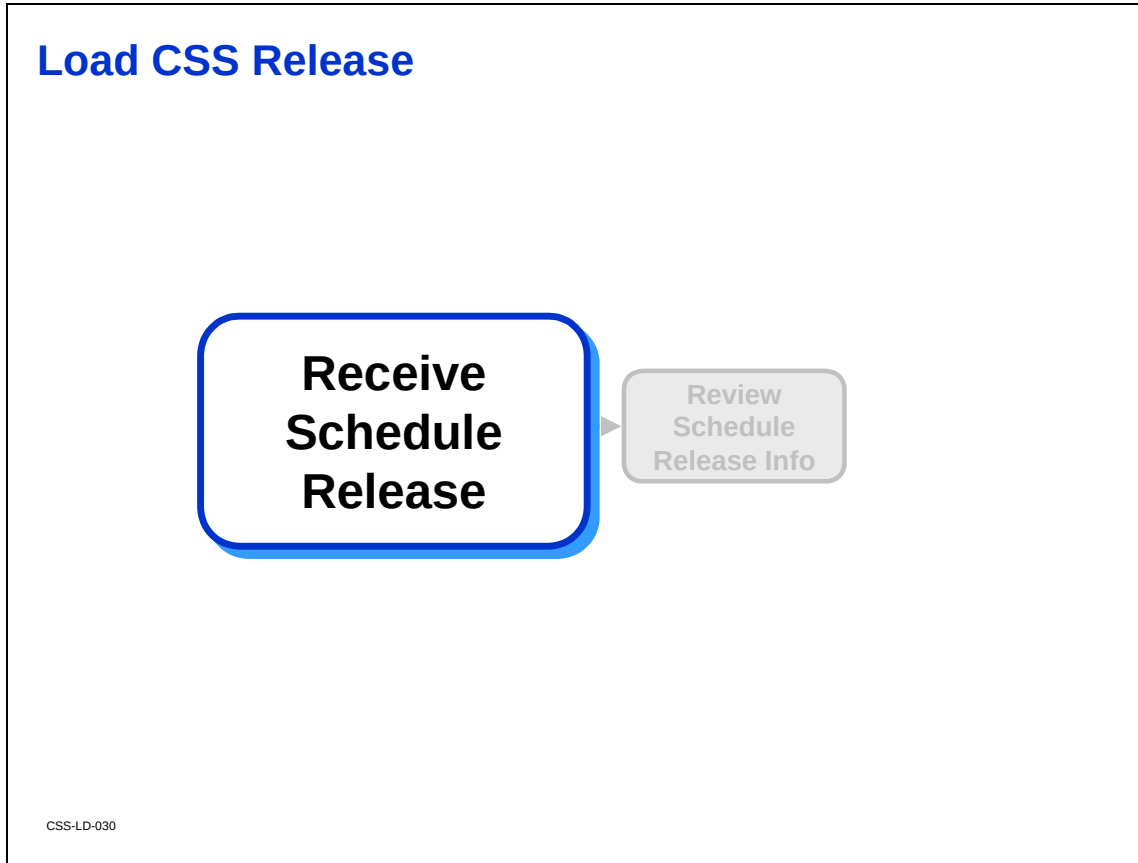
This illustration is a suggested setup sequence of master files for the CSS module which is based on information that flows from one master file to another and prerequisites that need to be accomplished before setting up a file. Reading the illustration:



Boxes with solid lines are required to load CSS and are covered in this course.



Shaded boxes reflect optional steps, but are covered in this course.



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 MFG/PRO. 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.

Note MFG/PRO retains every schedule the customer sends until you delete them from the system using Schedule Delete/Archive 7.5.23.

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.

Exercise: Planning Schedule

Note No Planning Schedule needed for Line 1.

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

Field	Data
Order	so100
Line	2
Release ID	1

Use Customer Plan Schedule Maintenance 7.5.1

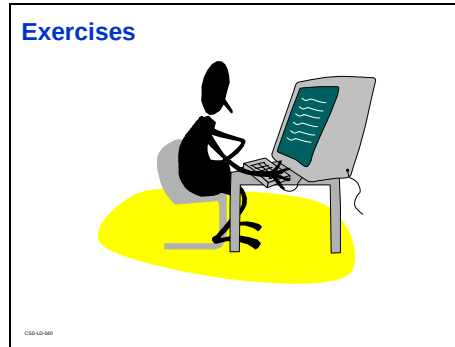
- 2 Advance to the lower frame and enter:

Field	Data
Comments	No
Prior Cum Date	<Yesterday's date>
Schedule Date 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

Tip 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 Date 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

Tip 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 Date 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

Tip 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 Date 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:

Field	Data
Order	so100
Line	1
Release ID	1

Use Customer Ship Schedule Maintenance 7.5.2

- 2 Advance to the lower frame and enter.

Field	Data
Comments	No
Prior Cum Date	<Yesterday's date>
Schedule Date 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
Tues		D		5	F	No	No
Wed		D		5	F	No	No
Thur		D		5	F	No	No
Fri		D		5	F	No	No
Monday week +1		D		5	F	No	No
Tues		D		5	F	No	No
Wed		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

Tip 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 Date 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
Tues		D		5	F	No	No
Wed		D		5	F	No	No
Thur		D		5	F	No	No
Fri		D		5	F	No	No
Monday week +1		D		5	F	No	No
Tues		D		5	F	No	No
Wed		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

Tip 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 Date Type	Ship

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

Date	Time	Int	Reference	Quantity	Q	Cmt	Rqm Det
Monday week +1		D		5	F	No	No
Tues		D		5	F	No	No
Wed		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

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

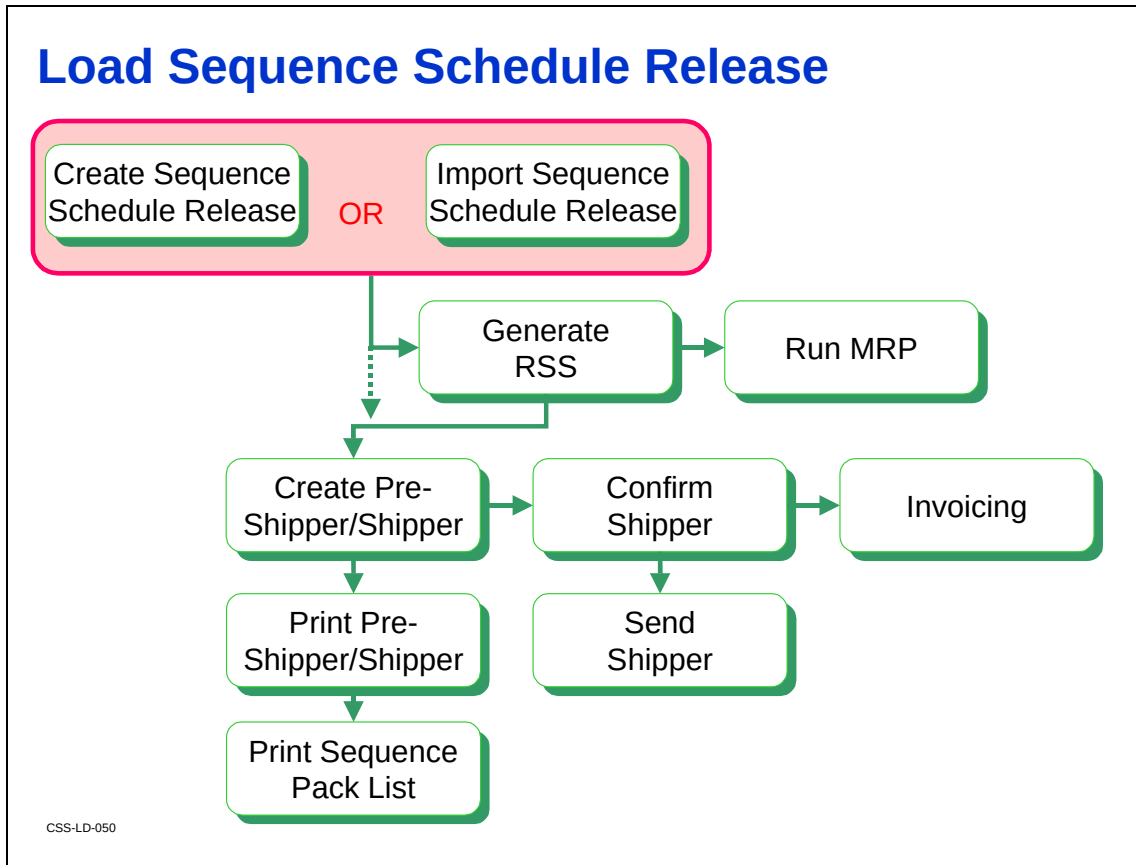
- 14** Advance to the lower frame and enter.

Field	Data
Comments	No
Prior Cum Date	<Yesterday's date>
Schedule Date 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
Tues		D		5	F	No	No
Wed		D		5	F	No	No
Thur		D		5	F	No	No
Fri		D		5	F	No	No
Monday week +1		D		5	F	No	No
Tues		D		5	F	No	No
Wed		D		5	F	No	No

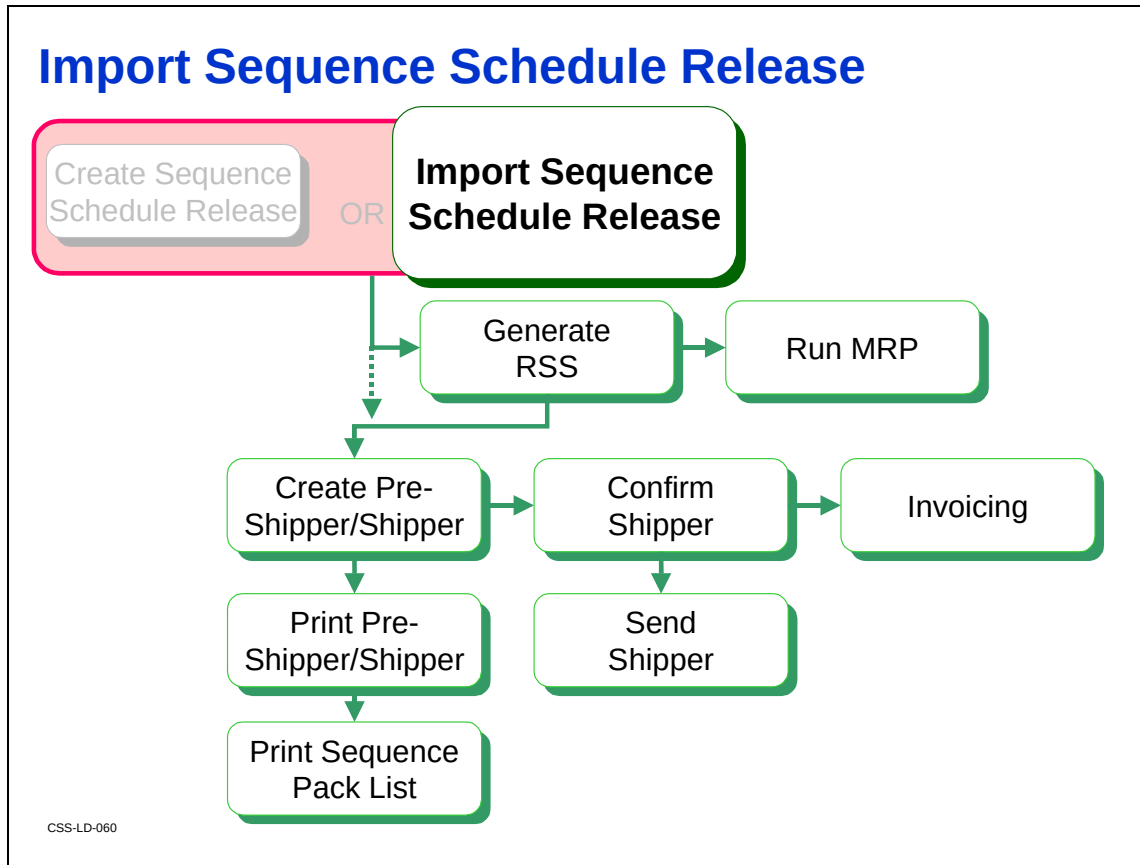
- 16** Enter Yes when the system prompts you to make this schedule active.



Load 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 35.13 (EDI)
 - Document Import 35.21.1 (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 EDI or ECommerce
 - Use Document Import 35.13 (EDI)
 - Use Document Import 35.21.1 (ECommerce)
- Import from an ASCII formatted file from an external system
 - Use Shipper Gateway 7.9.22

35.13 – Document Import

Document Import

User Menu Edit Queue Options Help

Address: To:

Document Type: To:

Document ID: To:

Import from File/Process:

Import File/Process Name:

Report Detail/Summary:

Update:

Output:

Batch ID:

F1=Help F2=Go ESC=End Ctrl-X=Cut Ctrl-C=Copy Ctrl-V=Paste

CSS-LD-070

Defaults from EDI Control File 35.24

Document Import

Menu Number 35.13

Use Document Import to:

- Recognize and accept EDI transmitted customer sequence schedule file formats
- Create new release of sequence schedule
- Produce an audit report

Field Definitions

Address

The address code of the trading partner.

Document Type

The document type.

- Document type is defined by individual EDI implementation

Document ID

Document identifier.

- If used, should be for the specific type of document.

Import from File/Process

Indicates the type of input being read.

- If File, system looks for a filename defined in the Import File/Process Name field
 - Use if retrieving data from the MFG/PRO database
- If Process, system looks for an executable program or script, starts it as a separate process
 - Can only be used with UNIX systems
 - Default

Note Value defaults from the Import from File or Process field set in the EDI Control File 35.24.

Import File/Process Name

Indicates the name of the file or process being imported.

Note Value defaults from the Import File/Process Name field set in EDI Control File 35.24.

Report Detail/Summary

Indicates the type of report to be printed.

- Detail is the default

Update

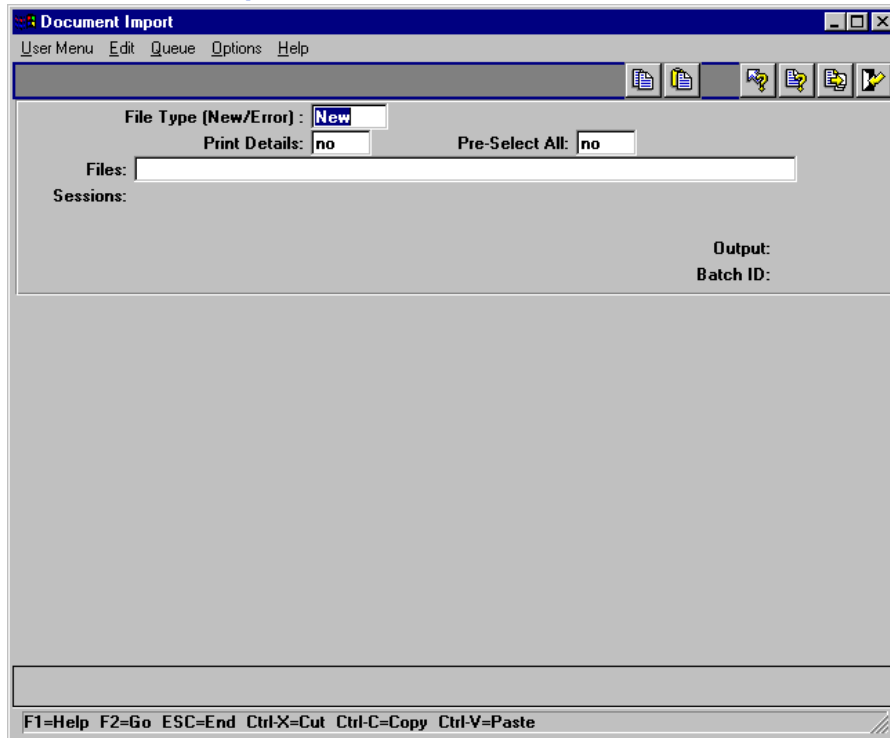
Determines if database is changed.

- If Yes, program runs in update mode and changes records in the database
 - Default
- If No, program runs in report only mode, no changes are made



Discussed in the following Training Guide: Customer Schedules

35.21.1 – Document Import



CSS-LD-080

Document Import

Menu Number 35.31.1

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

The system generates a report on the import process.

Field Definitions

File Type (New/Error)

Type of files to be listed in the Select File(s) frame.

- If New, system selects from a list of new, unprocessed files in the import directory
 - Default

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.

Print Details

Determines what is included on the report generated during the import process.

- If Yes, error and warning messages are included on the report
- If No, report only includes higher-level summary information
 - Default

Pre-Select All

- If Yes, all selected files display on the selection list
- If No, files still display, but none are initially selected
 - Default

Files

Names of the files to be imported, including extensions.

- Separate multiple file names with commas
- System validates the input

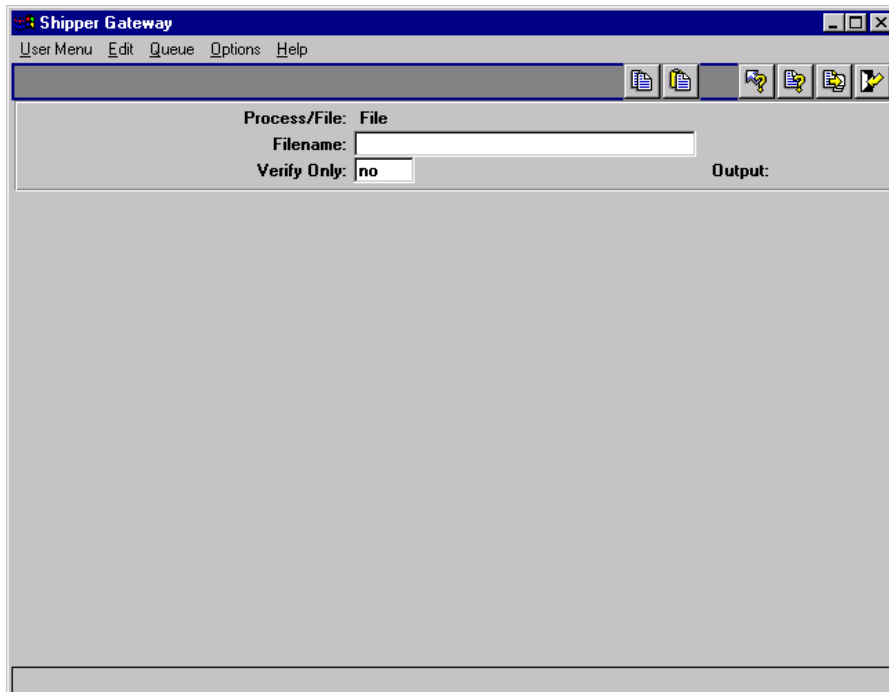
Sessions

- System-assigned numbers group all the files imported during a particular session
 - Track the status of the documents imported
 - Identify any errors that occurred during processing
- The system assigns a sequence number to each file selected
 - Use to group the documents within the file
- If documents cannot be loaded, the system writes them to an error file
 - Uses the process session number as a file name



Discussed in the following Training Guide: ECommerce

7.2.22 – Shipper Gateway



CSS-LD-090

Shipper Gateway

Menu Number 7.9.22

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.

Field Definitions*Process/File*

Display only.

- Defaults to File

Filename

The filename to be read by the system.

Verify Only

Determines if the records will be stored in the database.

- If Yes, records in the input file will be validated, but will not be stored in the database
- If No, records in the input file will be validated and stored in the database
 - Default

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.

Exercise: Import Sequence Schedule

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

Field	Data
Import from File/Process	File
Import File/Process Name	train1.866
Report Detail/Summary	Detail
Update	No

Use Use Document Import 35.13

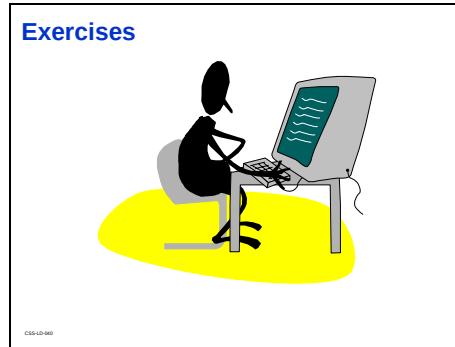
Note There should be one warning message, and no error messages.

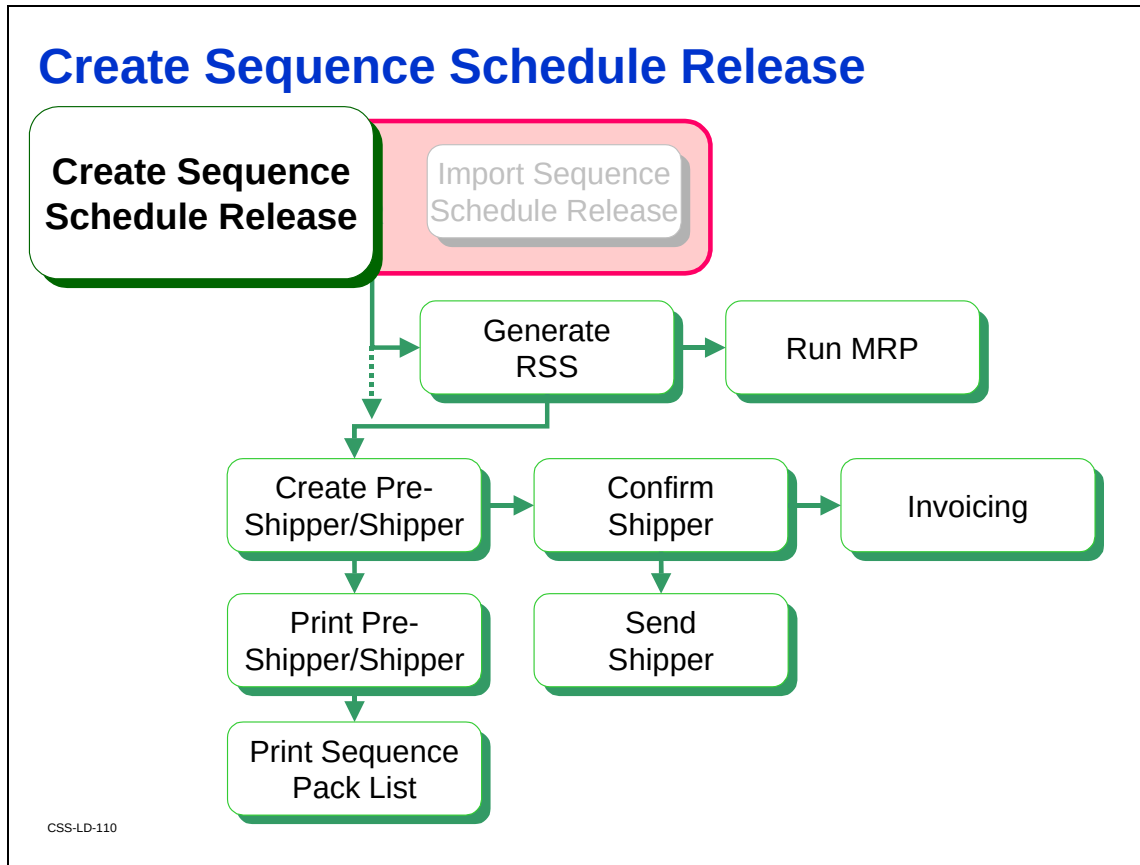
- 2 Verify the schedule with the table entries found in *Manually Create Sequence Schedule* on page 315.
- 3 To import the summary sequence schedule enter the following:

Field	Data
Import from File/Process	File
Import File/Process Name	train1.866
Report Detail/Summary	Summary
Update	Yes



See in this training guide: *Manually Create Sequence Schedule* on page 315





Create Sequence Schedule Release

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

7.5.4.5 – Sequence Schedule Maintenance

The screenshot shows the 'Sequence Schedule Maintenance' window. The title bar reads 'Sequence Schedule Maintenance'. The menu bar includes 'User Menu', 'Edit', 'Queue', 'Options', and 'Help'. The window contains the following fields:

- Ship-From: 10000 nj plant
- Ship-To: 01000036 Northwest Reliable
- Release ID: 1
- Active: no
- Create Date: 01/28/00 10:54
- Cumulative: no
- Packing Order: forward
- Sequences Per Container: 0
- Check Sequence Tolerance: yes
- Maximum Tolerance: 2
- Schedule Date Type: Delivery
- Active Start: 01/28/00
- Active End: / /

Annotations on the screenshot:

- A blue box labeled 'Ship or Delivery Schedule' points to the 'Schedule Date Type' field.
- A green box labeled 'Indicates if Quantities are Cumulative or Discrete' points to the 'Cumulative' field.
- A pink box labeled 'Indicates if the Schedule is Active' points to the 'Active' field.

At the bottom of the window, it says 'Adding new record.' and 'F1=Help F2=Go ESC=End F5=Delete Ctrl-X/C/V=Cut-Copy-Paste'.

CSS-LD-120

Sequence Schedule Maintenance

Menu Number 7.5.4.5

Use Sequence Schedule Maintenance 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

Note 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

Field Definitions

Ship From

Identifies the supplier.

Ship To

Identifies the customer/ship-to.

Release ID

Number identifying a specific release (version) of a customer sequence schedule.

- If creating a new sequence schedule release, enter a new release ID number

- Typically sent by the customer
- If left blank, system uses the current active release ID

Active

Indicates if the schedule release is the active release.

- If Yes:
 - Inactivates current active schedule
 - Activates this schedule as the current schedule
- If No, this schedule is not the active release
 - When modifying an inactive schedule release, the system prompts you to make the release active

Note There can be only one active release at any time for a ship-from/ship-to combination.

Second Frame

In the second frame you can enter new schedule details, or if modifying an existing release, edit schedule details.

Field Definitions

Create Date

The date and time this release was created.

Cumulative

Indicates if quantities in the schedule are stated in cumulative terms.

- If Yes, the plan is entered with cumulative quantities
 - For example, if the plan is for 100 per week, then it is entered as 100 in the first week, 200 in the second week, 300 in the third week, and so on
- If No, The plan is entered with discrete quantities per period
 - For example, if the plan is for 100 per week, then it is entered as 100 in the first week, 100 in the second week, 100 in the third week, and so on

Packing Order

Indicates the sequential packing order for every item in a shipment Your options are:

- Forward

- Reverse (i.e., first on top)

Sequences Per Container

Determines the maximum number of sequences that can fit in a container (i.e., packing parameters).

- Defaults to 0
- Can be any positive number

This value is used by Picklist/Pre-Shipper - Automatic 7.9.1 and Sequence Pre-Shipper - Automatic 7.5.4.10 to define logical breaks between multiple containers on the sequence picklist.

Check Sequence Tolerance

Determines if you are using tolerance checking. Using the tolerance checking option gives you the ability to validate sequences.

- If Yes, tolerance checking is turned on
 - System checks schedule sequence numbers for gaps
- If No, tolerance checking is turned off
 - Use when the environment uses alphanumeric sequence numbers

Maximum Tolerance

Specifies the maximum allowable size of the gap in consecutive sequence numbers on a schedule.

- Enter 0 to issue a warning whenever any gaps in sequence number are found

How the system uses this setting depends on the setting of the Check Sequence Tolerance field.

- If Check Sequence Tolerance is Yes, the system issues a warning when it detects numbering gaps greater than the Maximum Tolerance value
- If Check Sequence Tolerance is No, the system disregards the Maximum Tolerance field

Schedule Date Type

Determines how the requirement dates (i.e., delivery dates) are calculated by the Required Ship Schedule Update. You have two options:

- Ship
 - Indicates the date when the customer will pick up the shipment from your shipping dock
- Delivery
 - Indicates the date when the shipment must arrive at the customer's site or dock

Requirement dates are adjusted by the number of days specified in the Transport Days field set in Scheduled Order Maintenance (7.3.13). Transport Days act as a lead time.

Active Start

Start date of this schedule release.

- Defaults to the system date

Active End

End date of this schedule release.

- Typically left blank
- When a new release is made active, the system inputs the current system date into this field of the previously active release

7.5.4.5 – Sequence Schedule Maintenance: Sequence Detail Data Frame

Sequence Schedule Maintenance

User Menu Edit Queue Options Help

Ship-From: 10000 nj plant
 Ship-To: 01000036 Northwest Reliable
 Release ID: 1 Active: no

Sequence Detail Data

Date: 01/28/00 Time: 10:00
 Customer Job: 20000128
 Customer Sequence: 001
 Order: so2077 Line: 1
 Item Number: 88-100 CASE AUTO-UNIT
 PO Number:
 Customer Reference: 1R1234XYZ001
 Customer Dock:
 Line Feed:

UM: EA
Fulfillment Status
 Picked: no
 X-Ref: no

Quantity: 1.0 Cum Quantity: 0.0
 Customer Item:
 Customer Build Date: Status: Delete: no

Reference Only (points to Customer Build Date)
Set up in Generalized Codes Maintenance (points to Status)
If Yes, Delete Cannot be Undone (points to Delete: no)

F1=Help F2=Go ESC=End *Next/Prev* Ctrl-X/C/V=Cut-Copy-Paste

CSS-LD-130

Sequence 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

Field Definitions

Date

Date sequence scheduled material is to be shipped/delivered to the ship-to site.

- Must be within the schedule start and end dates

Time

The expected ship/delivery time of the sequence schedule material

Customer Job

Job number provided by customer.

- Optional

Customer Sequence

Number indicating the customer defined order for material to be delivered to the ship-to site.

Order

Sequence scheduled order number.

Line

Sequence scheduled order line number associated with the item.

UM

Unit of measure of the item being delivered.

- Display only

Item Number

Item number code identifying the item being shipped.

PO Number

Customer's purchase order number associated with the item on the sequence scheduled order.

Customer Reference

Customer assigned reference number (e.g., vehicle ID number).

Customer Dock

Customer specified ship-to location.

Line Feed

Customer specified destination for the material delivered to an assembly line.

Picked

Indicates if item is picked.

- Display only

X-Ref

Indicates if this a cross-referenced.

- Display only

Quantity

The discrete item quantity required by the sequence scheduled order.

Cum Quantity

Cumulative quantity.

- Display only

Customer Item

Customer's internal item number.

- Display only

Customer Build Date

Date the customer plans to have the finished product completed.

- Reference only

Status

Status code indicating that this sequence requires special handling or shipment.

Delete

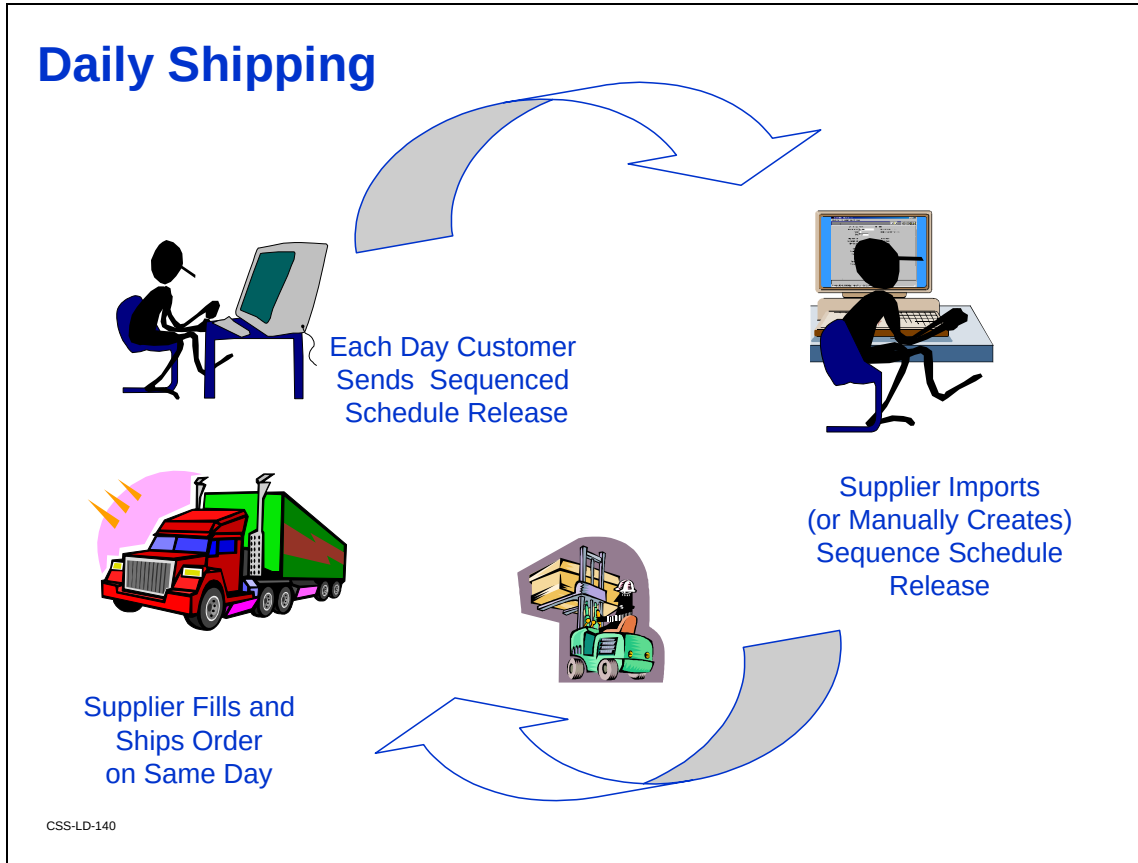
Indicates if the sequence is to be deleted from the sequence scheduled order.

- If Yes, the sequence will be deleted
- If No, the sequence will not be deleted

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.



See in this training guide: *Deleting Sequences* on page 283

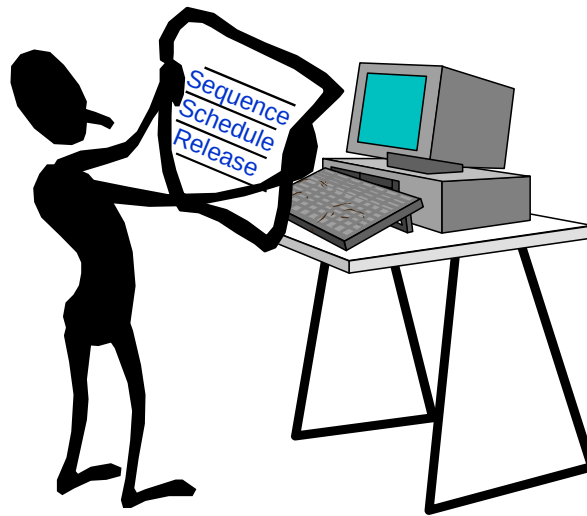


Daily Shipping

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

Reviewing 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

Load CSS Release



CSS-LD-160

7.5.4.6 – Sequence Schedule Inquiry

Sequence Schedule Inquiry

User Menu Edit Queue Options Help

Ship-From: 10000

Ship-To: 01000036

Release ID: 1

Active: yes

Starting Job:

Starting Sequence:

Starting Date: / /

Output: terminal

Starting Points Allow You to Determine Where to Start Looking

List complete.

F1=Help F2=Go ESC=End *Next/Prev* Ctrl-X/C/V=Cut-Copy-Paste

CSS-LD-170

Sequence Schedule Inquiry

Menu Number 7.5.4.6

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

- Can view all or all from a specified starting point

Field Definitions

Ship-From

Site from which the items are being shipped.

- Must correspond to an existing sequence scheduled order

Ship-To

Site to which items are being shipped.

- Must correspond to an existing sequence scheduled order

Release ID

The release ID identifying a specific version of an existing sequence scheduled order.

Active

Indicates the status of the sequence scheduled order.

- Display only

Starting Job

First customer job on the sequence scheduled order you want the system to display.

- Leave blank to begin with the first job on the sequence scheduled order

Starting Sequences

First sequence on the sequence scheduled order you want the system to display.

- Leave blank to begin with the first sequence on the sequence scheduled order

Starting Date

First date on the sequence scheduled order you want the system to display.

- Leave blank to begin with the first date on the sequence scheduled order

7.5.4.7 – Sequence Schedule Report

Sequence Schedule Report

User Menu Edit Queue Options Help

Ship-From: To:

Ship-To: To:

Release ID: To:

Customer Job: To:

Customer Sequence: To:

Customer Reference: To:

Item Number: To:

Order: To:

PO Number: To:

Status: To:

Ship/Delivery Date: / / : To: / / :

Active/History: Active

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

Include Deleted: no

Details: no

Sub-Totals: no

Output: Batch ID:

F1=Help F2=Go ESC=End Ctrl-X=Cut Ctrl-C=Copy Ctrl-V=Paste

Sequences Marked as Deleted Not Included in the Report

CSS-LD-180

Sequence Schedule Report

Menu Number 7.5.4.7

Use Sequence Schedule Report 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

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- 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



See in this training guide: *Deleting Sequences* on page 283

7.5.4.7 – Sequence Schedule 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 nj plant
Customer: GM General Motors
Ship-To: orion Lake Orion Assembly Plant
Release ID: 991210-22

Active: yes

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

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

Date: 12/08/99

Customer Job	Item	Order	Customer Ref	Customer Dock	Quantity	
Customer Sequence	Status	UM Line	PO	Line Feed	Cum Quantity	Delete
9110	100-1	EA ori-test 1	vin9110 ori-99		1.0	no
		Picked: yes		Pre-Shipper/Shipper: shp99087		Confirmed: yes
9111	100-1	EA ori-test 1	vin9111 ori-99		1.0	no
		Picked: yes		Pre-Shipper/Shipper: shp99087		Confirmed: yes
9112	100-1	EA ori-test 1	vin9112 ori-99		1.0	no
		Picked: yes		Pre-Shipper/Shipper: shp99087		Confirmed: yes
9113	100-1	EA ori-test 1	vin9113 ori-99		1.0	no
		Picked: yes		Pre-Shipper/Shipper: shp99087		Confirmed: yes

CSS-LD-190

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

7.5.4.7 – Sequence Schedule Report: Sample Report with Sub-Totals

~rcrp05.p

Page: 6

7.5.4.7 Sequence Schedule Report

Public Test Progress 91

Date: 01/28/00

Time: 11:29:03

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	

CSS-LD-200

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

Exercise: Print Sequence Schedule Report

- 1 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

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

ExercisesCSIS-10-000

7.5.4.16 – Sequence Schedule Variance Report

Sequence Schedule Variance Rpt

User Menu Edit Queue Options Help

Selection Criteria

Ship-From: To:

Ship-To: To:

Item Number: To:

Order: To:

Variance % :

ABC Class:

Current Release ID:

Previous Release ID:

Use to Specify the Sequence Schedules You Want to Compare

Clear Print Exit

F1=Help F2=Go ESC=End Ctrl-X=Cut Ctrl-C=Copy Ctrl-V=Paste

CSS-LD-220

Sequence Schedule Variance Report

Menu Number 7.5.4.16

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

- Variance percentage reported
- Useful when looking for extremes

7.5.4.17 – Plan/Ship Sequence Schedule Variance Report

Plan/Ship Sequence Variance Rpt

User Menu Edit Queue Options Help

Selection Criteria

Ship-From: 

Ship-To:

Item Number:

Order:

To:

To:

To:

To:

Variance % : 00

ABC Class:

Clear Print Exit

Cut Ctrl-C=Copy Ctrl-V=Paste

Use to Specify Percentage Reported

CSS-LD-230

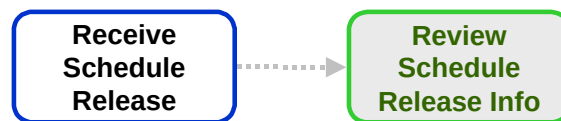
Plan/Ship Sequence Variance Report

Menu Number 7.5.7.17

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

- Variance percentage reported

Load CSS Release Summary



CSS-LD-240



Course Overview

- ✓ Introduction to Customer Sequence Schedules
- ✓ Business Considerations
- ✓ Set up Customer Sequence Schedules
- ✓ Load Customer Sequence Schedules
- ◆ Plan Customer Sequence Schedules
- ◆ Ship Customer Sequence Schedules
- ◆ Customer Sequence Schedules Features and Options

CSS-LD-250

CHAPTER 5

Planning





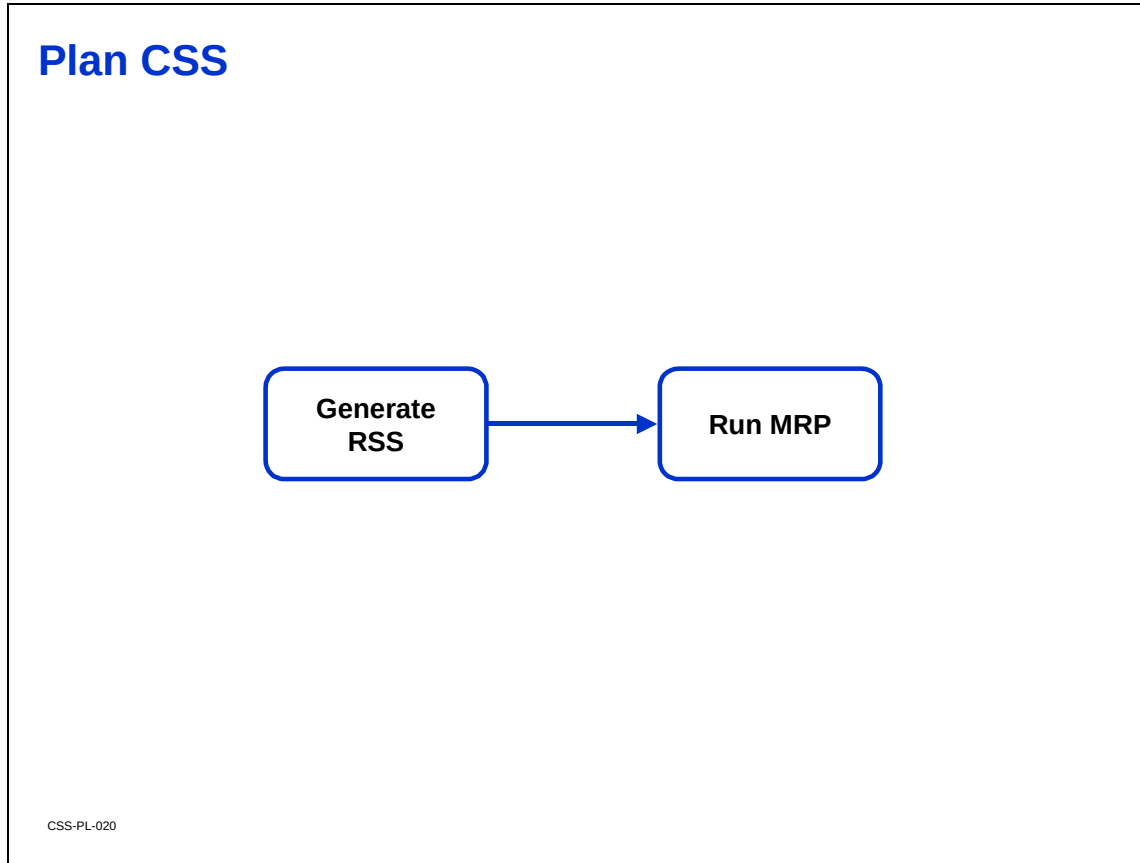
Plan CSS

In this section you learn how to:

- ✓ Identify some key business considerations before setting up CSS in MFG/PRO
- ✓ Set up CSS in MFG/PRO
- ✓ Loading CSS in MFG/PRO
- ✓ **Planning CSS in MFG/PRO**
 - ♦ Shipping CSS in MFG/PRO
 - ♦ CSS Features and Options

CSS-PL-010

Plan CSS

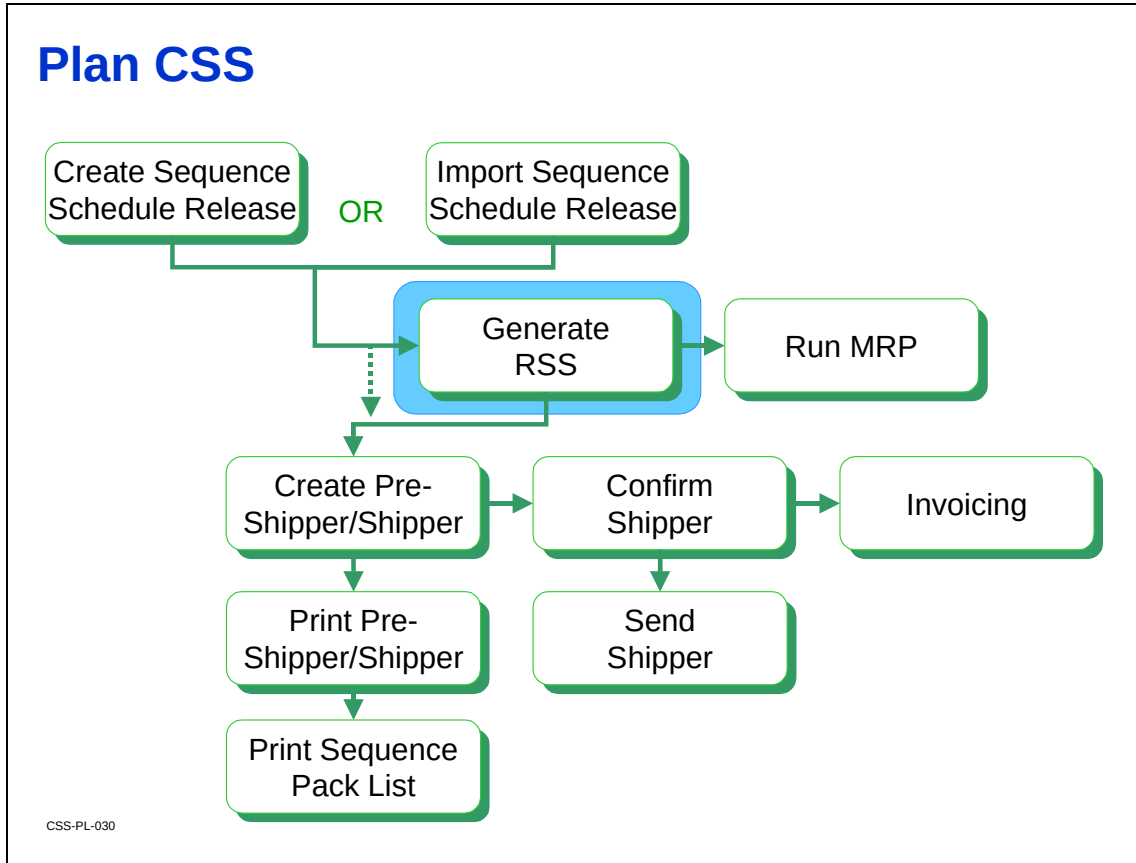


Plan CSS

This illustration is a suggested setup sequence of master files for the CSS 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. Reading the illustration:



Boxes with solid lines are required to plan CSS and are covered in this course.



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

Plan CSS



CSS-PL-040

7.5.5 – Required Ship Schedule Update

Required Ship Schedule Update

User Menu Edit Queue Options Help

Selection Criteria

Ship-From: 10000000 To: 10000

Sold-To: 001 To:

Ship-To: To:

Dock: To:

Item Number: 001-1020 To:

PO Number: To:

Order: To:

Report Detail/Summary: Summary

Update: yes

Clear Print Exit

F1=Help F2=Go ESC=End Ctrl-X=Cut Ctrl-C=Copy Ctrl-V=Paste

Determines if RSS is created

CSS-PL-050

Required Ship Schedule Update

Menu Number 7.5.5

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

Selection Criteria

Ship-From/Sold-To/Ship-To/Dock/Item Number/PO Number/Order

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

Report Options

Report Detail/Summary

You have two report options:

- Detail
- Summary

If Detail, a complete audit report prints. This report shows:

- Order details such as the ship-from, ship-to, item number, order number, line number, and PO Number
- The planning and shipping schedule details, including the Release ID for each
- If there is a customer or ship-to calendar
- What the transportation leadtime is for each schedule
- Resource authorization data
- If bucketing was used, and if so, the what is being used
- The new active RSS

If Summary, only the Sold-To, Ship-To, Item Number, PO Number, Plan Release ID, and Ship Release ID print as the system processes each order detail record.

- Default

Update

The system uses this setting to determine if it is to create a new schedule release for the order detail records selected.

- If Yes, the system calculates and creates a new schedule release
- If No, the system does the calculations and generates report, but does not do any actual updating to the database
 - Default

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
 - MFG/PRO 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



See in this training guide: *Scheduled Order Maintenance* on page 120

7.5.5 – 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		
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:		
Schedule Detail Data		
Date	Time	Reference
01/31/00	10:00	4.0
02/01/00	10:00	6.0ccx

CSS-PL-060

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

7.5.5 – Required Ship Schedule Update Report: **Shipping Schedule**

rcrsup.p 7.5.5 Required Ship Schedule Update Date: 02/03/00
Page: 2 Public Test Progress 91 Time: 11:38:10

Customer Ship Schedule- Required Quantities ←

Ship-From: 10000 Order: sc2077 Line: 1
Ship-To: 01000036 Northwest Reliable
Item: 88-100 CASE,AUTO-UNIT UM: EA
PO Number: Release ID: 1

Comments: no Create Date: 01/31/00 15:08:02
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:

Shipping Schedule

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

CSS-PL-070

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

7.5.5 – Required Ship Schedule Update Report: Planning Schedule

rcrsup.p
Page: 3

7.5.5 Required Ship Schedule Update
Public Test Progress 91

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

Customer Plan Schedule- Required Quantities

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

Order: 802077
Northwest Reliable
CASE,AUTO-UNIT
Release ID: 1

Line: 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 15:06:52
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
01/24/00	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

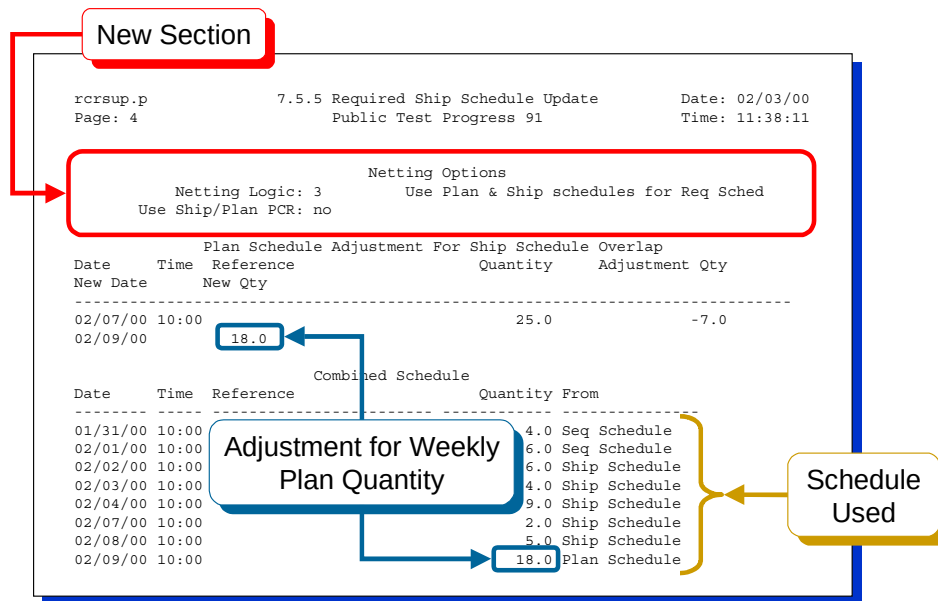
Fab Qty: 0.0	Fab Start: 01/28/00	Fab End:
Raw Qty: 0.0	Raw Start: 01/28/00	Raw End:

Planning
Schedule

CSS-PL-080

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

7.5.5 – Required Ship Schedule Update Report: Netting Options Section



CSS-PL-090

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

7.5.5 – Required Ship Schedule Update Report: RSS Schedule

rcrsup.p
Page: 6

7.5.5 Required Ship Schedule Update
Public Test Progress 91

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

Required Ship Schedule- Required Quantities

New RSS Schedule

Ship-From: 10000 Order: so2077 Line: 1

Ship-To: 01000036 Northwest Reliable

Item: 88-100 CASE,AUTO-UNIT UM: EA

PO Number: Release ID: 000002

Comments: no Create Date: 02/03/00 11:38:11

Prior Cum Req: 0.0 Cumulative: no

Prior Cum Date: 01/01/00 Active Start: 02/03/00

From Plan Id: 1 Active End:

From Ship Id: 1

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

CSS-PL-100

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

7.5.6 – Selective Req Ship Sched Update

Ship-From: Order: Line:

Ship-To: UM:

Item:

PD Number:

Ship Schedule Release ID:

Plan Schedule Release ID:

Sequence Schedule Release ID:

Report: Update: Output:

Set to No to Preview Changes

F1=Help F2=Go ESC=End *Next/Prev* Ctrl-X/C/V=Cut-Copy-Paste

CSS-PL-110

Selective Req Ship Sched Update

Menu Number 7.5.6

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.

Selection Criteria*Ship-From/Order/Ship-To/Item/PO Number*

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

Ship Schedule Release ID

Enter the specific ship schedule release ID.

Plan Schedule Release ID

Enter the specific plan schedule release ID.

Sequence Schedule Release ID

Enter the specific sequence schedule release ID.

Report Options*Report*

You have the option of generating an audit report which shows the records that are being changed.

- If Yes, the process generates a report
 - Default
- If No, the process does not generate a report

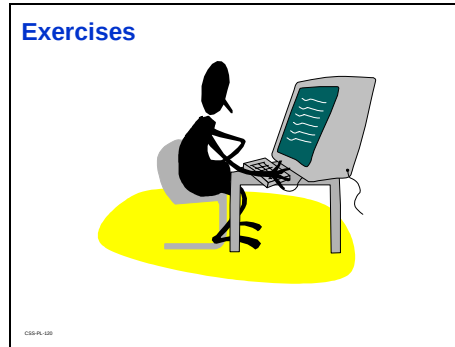
Update

- If Yes, the system makes the changes to the database
- If No, no changes are made
 - Default

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.

Exercise: Required Ship Schedule Update

Description: 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.



- 1 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

Use Required Ship Schedule Update 7.5.5

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

Line 1:

M-W	Requirements from sequence schedule
Th-F	Requirements from shipping schedule
Week 2+	Requirements from shipping schedule

Line 2:

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

Line 3:

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

Line 4:

M-W	Requirements from sequence schedule
Th-F	Requirements from shipping schedule
F	Adjustment from weekly planning schedule, if planning requirements NOT consumed
M-W	Requirements from shipping schedule
W	Adjustment from weekly planning schedule, if planning requirements NOT consumed
Week 3+	Requirements from planning schedule

Line 5:

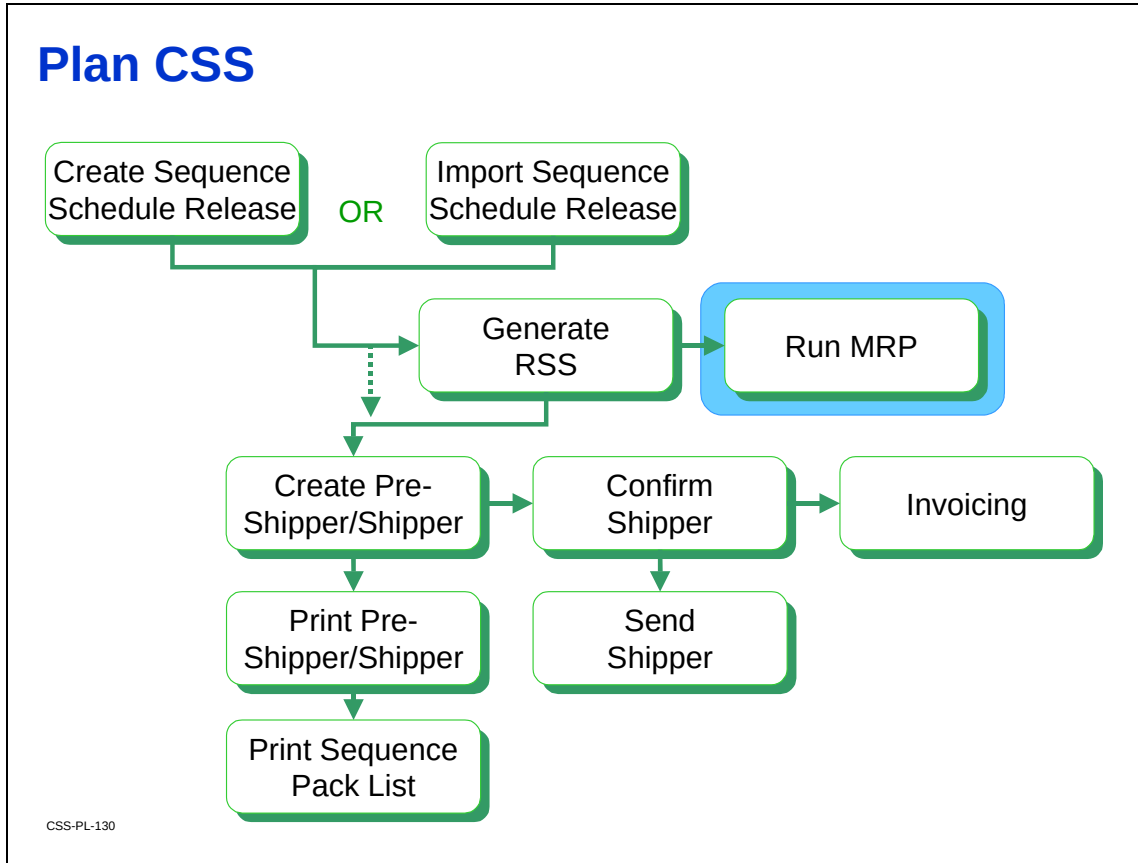
M-F	Requirements from shipping schedule
M-W	Requirements from shipping schedule
Th-F	Requirements from planning schedule
Week 3+	Requirements from planning schedule

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

3 To generate the RSS, enter the following:

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

Use Required Ship Schedule Update 7.5.5



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.

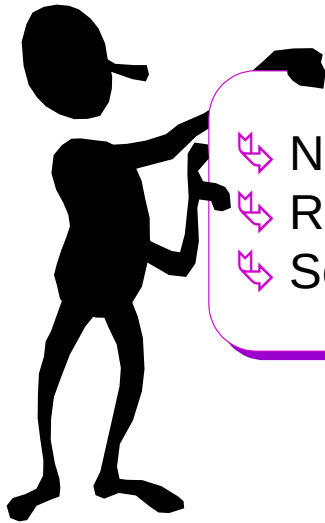
Note MRP only looks at the active RSS.

Plan CSS



CSS-PL-140

MRP – Calculating Requirements



- ↗ Net Change Materials Plan 23.1
- ↗ Regenerate Materials Plan 23.2
- ↗ Selective Materials Plan 23.3

CSS-PL-150

MFG/PRO offers 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

23.16 – MRP Detail Inquiry

MRP Detail Inquiry

User Menu Edit Queue Options Help

Item Number: part1 Site: 10000 Start Date: / /

sunroof, red

Output:

F1=Help F2=Go ESC=End *Next/Prev* Ctrl-X/C/V=Cut-Copy-Paste

CSS-PL-160

MRP Detail Inquiry

Menu Number 23.16

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.

23.16 – MRP Detail Inquiry: Display

MRP Detail Inquiry

User Menu Edit Queue Options Help

Item Number: 88-100 Qty On Hand: -105.0 Site: 10000

CASE, AUTO-UNIT UM: EA Pur/Mfg: M

Buyer/Planner: Ord Pol: POQ Min Ord: 0 Mfg LT: 0

Master Sched: yes Ord Period: 7 Max Ord: 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 Stk: 0 Yield%: 100.00% Cum LT: 1

Due Date	Gross	Reqs	Sched Rcpt	Proj QOH	Plan Ords	Details
01/31/00		4		280		CS S/O: so2077 Line: 1
02/01/00		6		274		CS S/O: so2077 Line: 1
02/02/00		6		268		CS S/O: so2077 Line: 1
02/03/00		4		264		CS S/O: so2077 Line: 1
02/04/00		9		255		CS S/O: so2077 Line: 1
02/07/00		25		230		CS S/O: so2077 Line: 1

List complete.

Press space bar to continue.

CSS-PL-170

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

Plan CSS Summary



CSS-PL-180



Course Overview

- ✓ Introduction to Customer Sequence Schedules
- ✓ Business Considerations
- ✓ Set up Customer Sequence Schedules
- ✓ Load Customer Sequence Schedules
- ✓ Plan Customer Sequence Schedules
- ◆ Ship Customer Sequence Schedules
- ◆ Customer Sequence Schedules Features and Options

CSS-PL-190

CHAPTER 6

Shipping





Shipping CSS

In this section you learn how to:

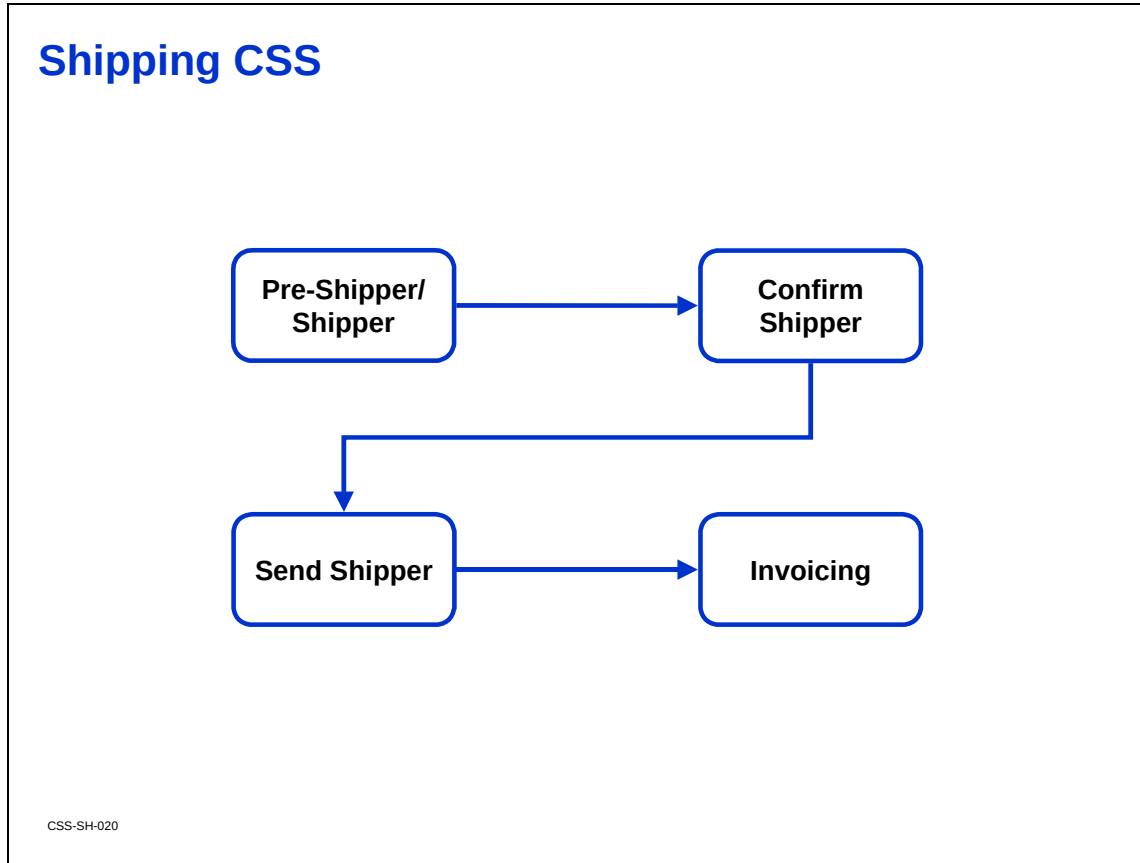
- ✓ Identify some key business considerations before setting up CSS in MFG/PRO
- ✓ Set up CSS in MFG/PRO
- ✓ Loading CSS in MFG/PRO
- ✓ Planning CSS in MFG/PRO

✓ Shipping CSS in MFG/PRO

- ◆ CSS Features and Options

CSS-SH-010

Shipping CSS

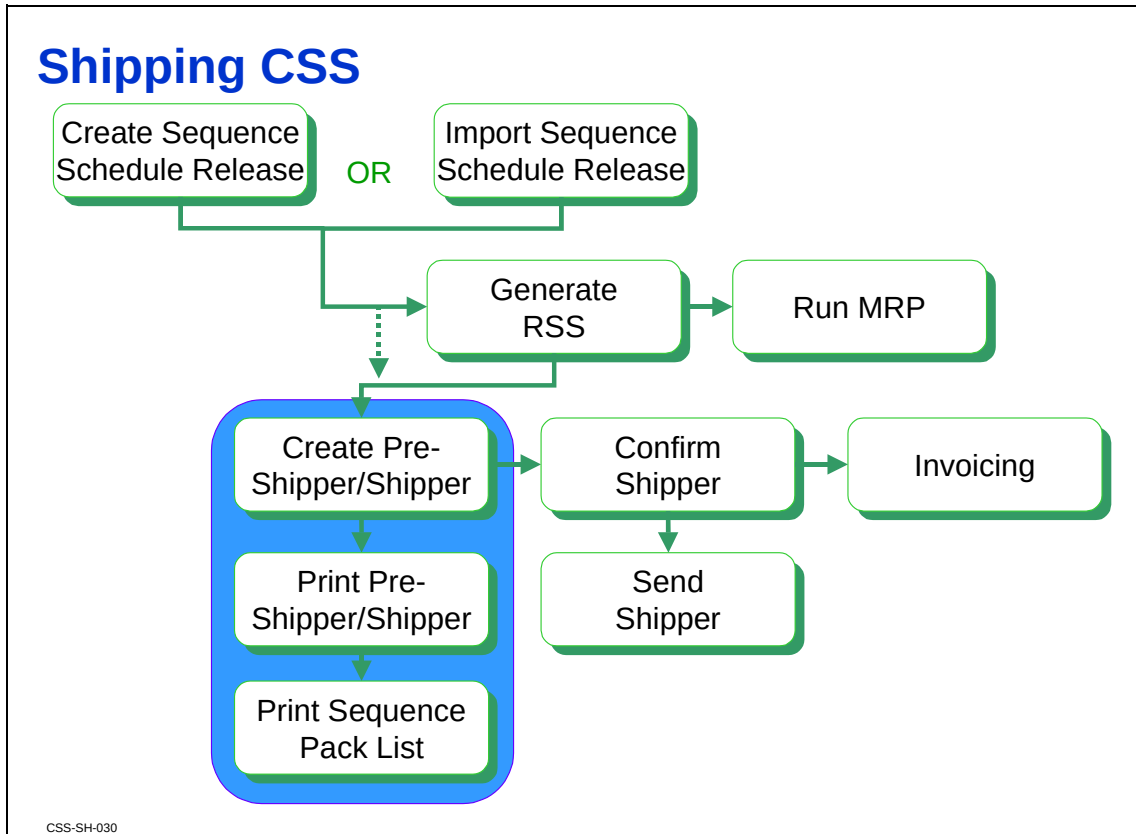


Shipping CSS

This illustration is a suggested setup sequence of master files for the CSS 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. Reading the illustration:



Boxes with solid lines are required to ship CSS and are covered in this course.



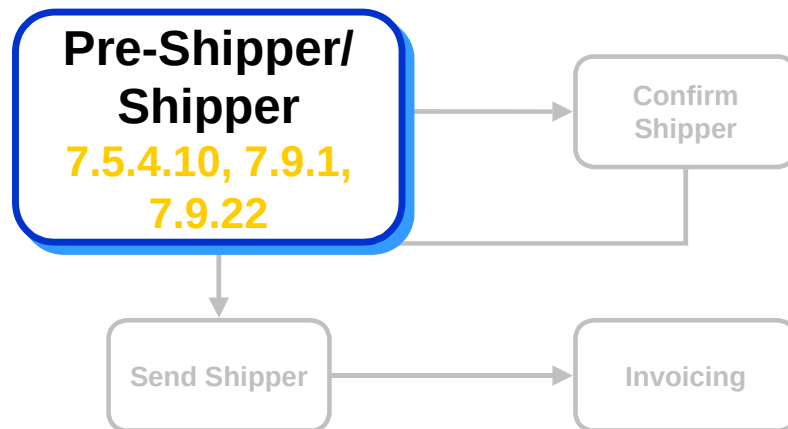
Create Pre-Shipper/Shipper

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. (MFG/PRO 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

Note 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 CSS



CSS-SH-040

7.5.4.10 – Sequence Pre-Shipper Automatic

CSS-SH-050

Sequence Pre-Shipper - Automatic

Menu Number 7.5.4.10

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)

Selection Criteria

Due Date / Ship-To / Site / Customer Job / Customer Sequence / Customer Reference / Customer Dock / Line Feed / Status

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

Field Definitions

Auto Allocation

Determines if the system performs a general inventory allocation for confirmed scheduled order lines that are not yet general allocated at the time you run Picklist/Pre-Shipper - Automatic.

- If Yes, allocations are limited to the quantity available to allocate
 - If there is not enough inventory to allocate the entire scheduled order, the system partially allocates the inventory
 - If there is no inventory available to allocate, the system does not allocate inventory for the scheduled order
- If No, system does not allocate inventory
 - Default

Stage Open Quantities

Allows creation of picklists for scheduled order lines that cannot be detail allocated because inventory is not yet available. Useful if at the time you create the picklist the inventory is not available, but will become available soon.

- If Yes, picklists will be created based on open scheduled order line quantities.
 - The open scheduled order line quantity does not have to be detail allocated
 - Can create a pre-shipper for an order line even if there is insufficient inventory
 - Overrides the effects of the Auto Allocation setting and overrides a Yes setting in Ship Avail Qty for Kit

- If No, picklists will be created based on scheduled order lines that have been detail allocated only
 - Default

Note If this option is set to Yes, you cannot have the Use Containers option also set to Yes.

Override Partial OK

Determines if the partial shipment flag on each scheduled order is to be considered when printing picklists.

- If Yes, the customer will accept a partial shipment
 - A packing list prints (and shipments made) even if the entire scheduled order quantity is not available
 - The remainder of the scheduled order is backordered and remains in the system until it can be shipped
- If No, the customer will not accept partial shipment
 - If all items are not available (allocated) and cannot be completely shipped, a packing list does not print for this scheduled order
 - Packing list prints only if all line items have been allocated
 - Default

Use Containers

Determines if containers meeting specific criteria are assigned to and referenced on the picklists. Useful if you temporarily store your finished goods in containers before shipping. It allows you to pick specific containers rather than items at specific locations.

- If Yes, system assigns containers meeting the specific criteria to picklists
 - Picklists reference the assigned containers
- If No, system does not assign containers to picklists
 - Default

Note If this option is set to Yes, the Stage Open Quantities options cannot be set to Yes.

Only containers meeting the following criteria are assigned to picklists:

- The container has no parent
 - The container cannot already be assigned to another container, pre-shipper, or shipper
- The container contains only the scheduled order line item number.
 - Automatic container assignment doesn't work when containers contain more than one item number

- The container contains a quantity of the scheduled order line item number that is equal to or less than the uncontainerized quantity for the scheduled order line
- The container item number is either the primary container for the scheduled order line or one of the alternate containers for the scheduled order line

Break on Maximum Sequence

Determines the maximum number of sequences allowed on a shipper.

- Defaults to 0 (zero)
 - Shipper can contain an unlimited number of sequences

Update

Determines if the changes are made to the database.

- If Yes, the system generates the report and makes the changes to the database
 - Default
- If No, the system only generates the report

Break on Maximum Weight

Determines the maximum gross weight for the pre-shipper.

- If zero (0), system creates pre-shippers without regard to maximum gross weight
- If nonzero, system checks pre-shipper gross weight before adding a new order line item to make sure the addition will not cause the pre-shipper to exceed the maximum gross weight
 - If it would exceed the maximum gross weight, the system creates a new pre-shipper

[UM Maximum Weight]

The unit of measure of the Break on Maximum Weight value.

Break on Maximum Volume

Determines the maximum volume for the pre-shipper.

- If zero (0), the system creates pre-shippers without regard to maximum volume
- If nonzero, the system the pre-shipper volume before adding a new order line item to make sure the addition will not cause the pre-shipper to exceed the maximum volume
 - If it would exceed the maximum volume, the system creates a new pre-shipper

[UM Maximum Volume]

The unit of measure of the Break on Maximum Volume value.

Include Packing List Comments

Determines whether or not the system leaves room for packing list comments on the pre-shipper.

- If Yes, the system leaves room for packing list comments on the pre-shipper
- If No, the system does not leave room for packing list comments on the pre-shipper
 - Default

Print Only Lines to Pick

Determines if the system prints on the pre-shipper all scheduled order line item numbers that have been detailed allocated.

- If Yes, system prints only scheduled order line item numbers that have been detailed allocated
 - Default
- If No, system prints all scheduled order line item numbers

Print Features and Options

Determines if the system prints configures line item numbers followed by a list of features and options.

- If Yes, features and options print after the configured item number
- If No, only the configured item number prints
 - Default

Print Packing List Comments

- If Yes, system prints packing list comments
- If No, system does not print packing list comments
 - Default

Create Pre-Shipper in SO UM

When an alternate unit of measure (UM) is used, this determines which UM the system uses when creating the pre-shipper.

- If Yes, system uses the UM specified on the scheduled order in Scheduled Order Maintenance
 - Default
- If No, system uses the UM specified for the item in Item Master Maintenance

Form Code

The form code of the document format on which you want these documents to print.

- Defaults to 1

Output

Specifies where to send the report output. The output can be a:

- Printer
- Terminal (Character)
- Window (GUI)
- File name

Normally, a report prints 132 characters across the page. On a standard screen, the report wraps. If your screen supports compressed print mode, modify the printer settings in Printer Setup Maintenance 36.13.2.

Batch ID

Specifies the batch ID.

- System takes the report request and puts it in a queue for later batch processing
- Optional

Shipper Verification

Shipper verification occurs automatically at the end of processing. A Picklist/Pre-Shipper report is generated containing information such as:

- Pre-shipper number
- General order details such as:
 - Order number
 - Ship-to
 - Item number
- Customer dock
- Line feed
- Total gross requirements by item

For sequence scheduled orders a second page, the Sequence Pack List, prints.

- Shows the sequence information in order by sequence

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

Picklist/Pre-Shipper: Sample Report

Ship To: 01000036		P I C K L I S T / P R E - S H I P P E R	
Northwest Reliable 1000 B Street		Pre-Shipper: P00000288	
		Page: 1	
Coos Bay United States of America		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	10000				
	Revision: AA					
	CASE,AUTO-UNIT					
			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:

CSS-SH-060

Picklist/Pre-Shipper Report

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

Sequence Pack List: Sample Report

Sequence

Second Page of Pre-Shipper

Ship To: 01000036
Northwest Reliable
1000 B Street

Coos Bay
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 1R1234XYZ001	88-100	1.0	EA	
2 20000128 1R1234XYZ002	88-100	1.0	EA	
3 20000128 1R1234XYZ003	88-100	1.0	EA	
4 20000128 1R1234XYZ004	88-100	1.0	EA	
5 20000128 1R1234XYZ005	88-100	1.0	EA	

CSS-SH-070

Sequence Pack List

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)

7.9.1 – Picklist/Pre-Shipper - Automatic

Selection Criteria

Due Date: / / : To: / / :
 Sales Order: To:
 Ship-To: To:
 Language: To:
 Site: To:
 Address List Type: To:
 Item Number: To:
 Reference: To:

Creation and Print Options

Auto Allocation: no	Break on Maximum Weight: 0.00
Allocate Components: no	Break on Maximum Volume: 0.00
Ship Avail Qty for Kit: no	Include Packing List Comments: no
Stage Open Quantities: no	Print Only Lines to Pick: yes
Override Partial OK: no	Print Features and Options: no
Use Containers: no	Print Packing List Comments: no
Break on Sales Order: no	Create Pre-Shipper in SQ UM: yes
Update: yes	Form Code: 1

Output:
Batch ID:

F1=Help F2=Go ESC=End Ctrl-X=Cut Ctrl-C=Copy Ctrl-V=Paste

CSS-SH-080

Picklist/Pre-Shipper - Automatic

Menu Number 7.9.1

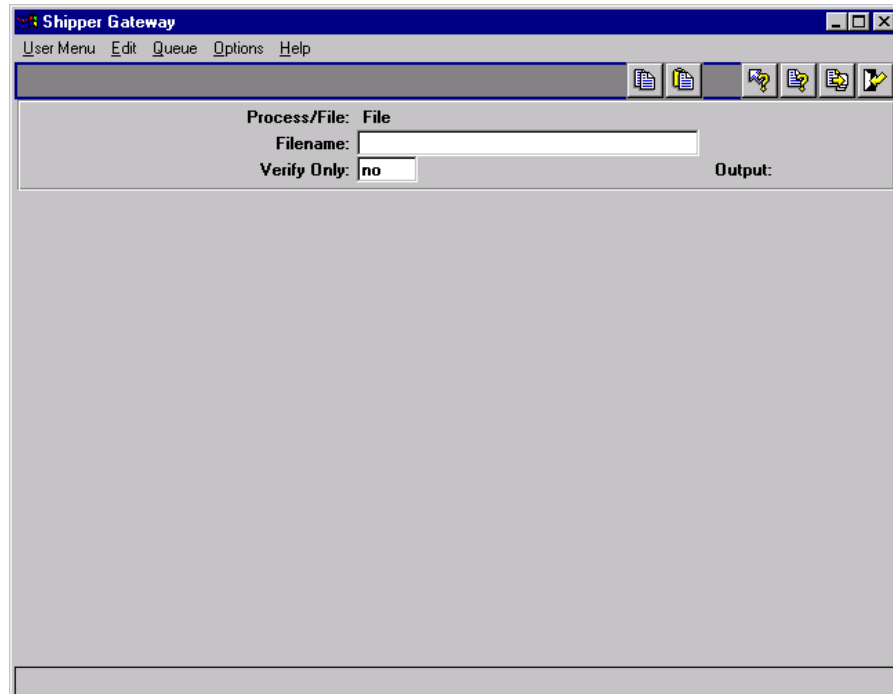
Use Picklist/Pre-Shipper - Automatic to generate a pre-shipper for sequenced and non-sequenced scheduled orders.

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



Discussed in the following Training Guide: Customer Schedules

7.9.22 – Shipper Gateway



CSS-SH-090

Shipper Gateway

Menu Number 7.9.22

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.

7.9.22 – Shipper Gateway: Sample Report

rcshgw.p 99	7.9.22 Shipper Gateway	Date: 02/01/00
Page: 1	Your Name Here	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: sol0063
Line: 1	Parent: sESHP000	
Customer PO: pol100	Qty UM: EA	Ship Weight: 0
Weight UM:	Volume: 0	Volume UM:
Net Weight: 0	Ship Via:	Fob:
Carrier Ref:	Trans Mode:	
Vehicle Ref: vin100		Tare Weight:
Customer Job: job1		
Customer Seq: seq1		
Customer Doc: dock1		
Line Feed: line1		
Kanban:		

Item added to shipper item y.

CSS-SH-100

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

7.9.2 – Pre-Shipper/Shipper Workbench

Ship-From: 10000

Pre-Shipper/Shipper: Shipper

Number:

Ship-To/Dock: 15000

Shipping Group: Local

Inventory Movement Code: Std_Ship

Local Shipments

Standard Sales Order Shipment

F1=Help F2=Go ESC=End *Next/Prev* Ctrl-X/C/V=Cut-Copy-Paste

CSS-SH-110

Pre-Shipper/Shipper Workbench

Menu Number 7.9.2

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



Discussed in the following Training Guide: Customer Schedules

7.9.2 – Pre-Shipper/Shipper Workbench: Carrier Detail Frame

Pre-Shipper/Shipper Workbench

User Menu Edit Queue Options Help

Ship-From: 10000 San Diego Main Plant

Pre-Shipper/Shipper: Shipper

Number: SHIP000000001

Ship-To/Dock: 15000 San Diego Auto Plant
3000 State Street

Shipping Group: Local Local Shipments

Inventory Movement Code: Std_Ship Standard Sales Order Shipment

Carrier: 00000002 Multi: no Document Format: 01

Ship Via: Consolidate Ship: optional

FOB Point: Language:

Mode of Transport: Carrier Shipment Ref: SHIP000000001 Merge Other Pre-Shippers: no

Vehicle ID: Comments: no

Set to Yes if there is more than one carrier

Adding new record.

Enter data or press ESC to end.

CSS-SH-120

Header Frame

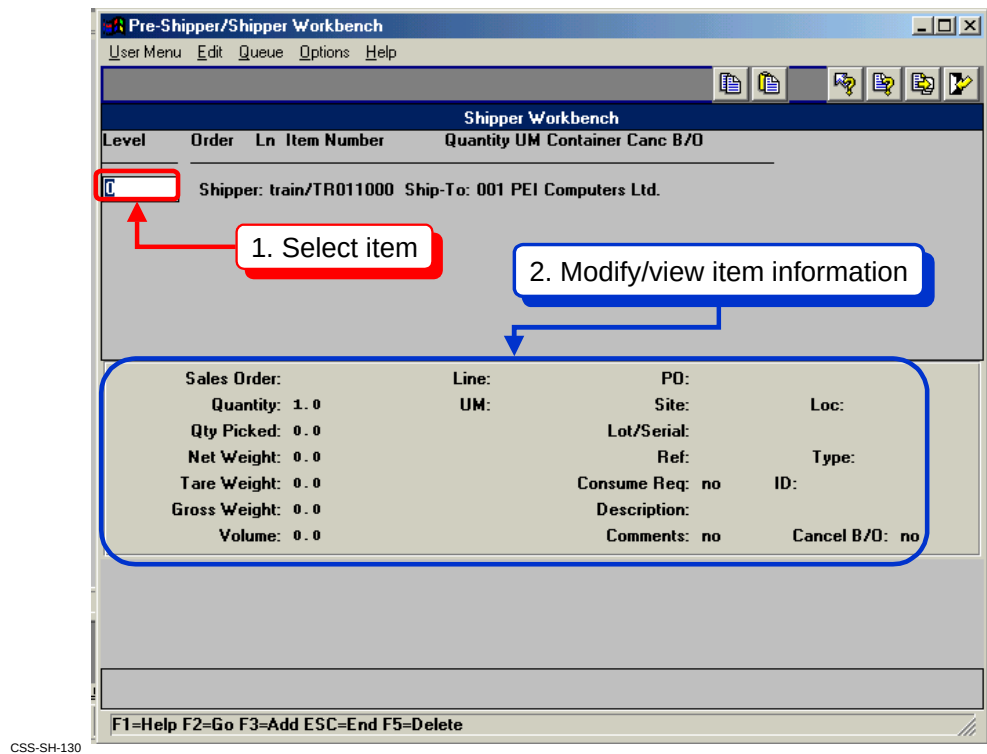
In the header frame you identify the pre-shipper or shipper that you want to see. You do this by specifying:

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

Carrier Detail Frame

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

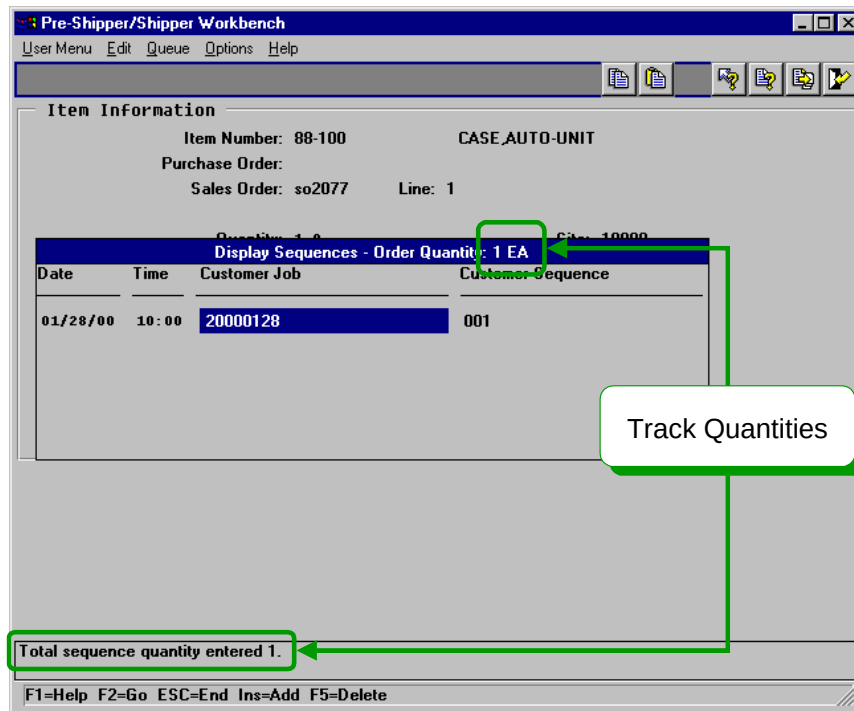
7.9.2 – Pre-Shipper/Shipper Workbench: Shipper Workbench Frame



Shipper Workbench Frame

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.

7.9.2 – Pre-Shipper/Shipper Workbench: Display Sequences Frame



CSS-SH-140

Display Sequences Frame

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

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

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

7.9.2 – Pre-Shipper/Shipper Workbench: Add Sequences Frame

Pre-Shipper/Shipper Workbench

User Menu Edit Queue Options Help

Item Information

Item Number: 88-100 CASE_AUTO-UNIT
 Purchase Order:
 Sales Order: so2077 Line: 1

Add Sequences - Order Quantity: 1 EA

Customer Job: 20000128
 Customer Sequence: 001
 Customer Reference: TR1234XYZ001
 Customer Dock:
 Line Feed:
 Date: 01/28/00 Time: 10:00
 Quantity: 1.0 UM: EA
 Status:
 Customer Build Date:

F1=Help F2=Go ESC=End *Next/Prev* Ctrl-X/C/V=Cut-Copy-Paste

CSS-SH-150

Add Sequences Frame

You can use the Add Sequences frame to add sequences to an existing pre-shipper/shipper for a scheduled order.

- Can add sequences only if:
 - Scheduled order contains sequences
 - From the active schedule release
 - Sequences are not marked as deleted, picked, or cross-referenced

Once a sequence has been added to the pre-shipper/shipper, the system flags the sequence as having been picked.

You can also use this frame to modify any sequences associated with this pre-shipper/shipper.

Field Definitions*Customer Job*

Customer job number (provided by customer).

- Optional

Customer Sequence

The customer-defined order in which they want the sequenced material delivered.

Customer Reference

Customer reference.

Customer Dock

The location, specified by the customer, where the material is to be delivered.

Line Feed

The assembly line, specified by the customer, where the material is to be delivered.

Date

Date the material is to be shipped/delivered to the customer's site.

- Must be within the sequence scheduled order's start and end date

Time

The expected ship/delivery time of the material.

7.9.2 – Pre-Shipper/Shipper Workbench: Display Sequence Detail Frame

Pre-Shipper/Shipper Workbench

User Menu Edit Queue Options Help

Shipper Workbench

Level	Order	Ln	Item Number	Quantity	UM	Container	Canc	B/O
0	Pre-Shipper: 10000/00000001 Ship-To: f001 Explorer Assembly Plant							
.1	so100	1	part1	3.0	EA		no	
.1	so100	2	part2	3.0	EA		no	

Display Sequence Detail - Order Quantity: 3 EA

Customer Job: 20000301

Customer Sequence: 001

Customer Reference: 1R001

Customer Dock:

Line Feed:

Date: 02/05/01 Time: :

Quantity: 1.0 UM: EA

Status:

Customer Build Date:

no

Total sequence quantity entered 3

Total sequence quantity entered 3

F1=Help F2=Go ESC=End *Next/Prev* Ctrl-X/C/V=Cut-Copy-Paste

CSS-SH-160

Display Sequence Detail

Use the Display Sequence Detail frame to view sequence information.

7.9.2 – Pre-Shipper/Shipper Workbench: Trailer Information Frame

The screenshot shows the 'Pre-Shipper/Shipper Workbench' window. The title bar includes 'Pre-Shipper/Shipper Workbench' and standard window controls. The menu bar contains 'User Menu', 'Edit', 'Queue', 'Options', and 'Help'. The toolbar has icons for file operations and help. The main area displays shipping details:

Ship-From: train	Training Database Site
Pre-Shipper/Shipper: Shipper	
Number: TR011000EXP	
Ship-To/Dock: 001	PEI Computers Ltd.
	37 Atlantic Road
Shipping Group: TR-SLSX	TRAIN Export Sales Shipments
Inventory Movement Code: SLS-EXP	Export Sales Shipments

The 'Trailer Information' frame is highlighted with a blue border. It contains:

Status: ☐	Trailer Comments: no
Cancel Date:	

At the bottom, a status bar shows keyboard shortcuts: F1=Help F2=Go F3=Add ESC=End F5=Delete.

CSS-SH-170

Trailer Information Frame

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

Cancel Date

The date the shipper was cancelled.

Trailer Comments

Determines if trailer comments are added to this shipment.

- If Yes, you can enter trailer comments
 - A Transaction Comments screen appears
- If No, you cannot enter trailer comments

7.9.2 – Pre-Shipper/Shipper Workbench: Print Shipper Frame

Pre-Shipper/Shipper Workbench

User Menu Edit Queue Options Help

Ship-From: 10000 San Diego Main Plant
Pre-Shipper/Shipper: Pre-Shipper
Number: 00000001

Ship-To/Dock: f001 Explorer Assembly Plant

Shipping Group: 10000 Shipments from Site 10000
Inventory Movement Code: 001 Sales Shipment

Print Shipper

Include Shipper Comments: yes
Include Packing List Comments: yes
Print Features and Options: no
Print Sales Order Detail: no
Assign Shipper Number: no
Display Quantity In SO UM: no
Company Address: 10000000

Output:

F1=Help F2=Go F3=Add ESC=End F5=Delete

CSS-SH-180

Print Shipper Frame

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

Field Definitions

Include Shipper Comments

- If Yes, shipper comments are included
- If No, shipper comments are not included

Include Packing List Comments

Determines whether to consider the size of pack list comments when calculating the maximum number of lines to be printed on the pre-shipper/shipper. Used in conjunction with the Max Lines on a Pre-Shipper field (set in the Customer Schedules Control File 7.3.24.)

- If Yes, system leaves enough room on each page of the pre-shipper/shipper to print the packing list comments
- If No, system does not allocate space for packing list comments on the pre-shipper/shipper

Print Features and Options

Determines if a list of features and options prints.

- If Yes, system prints each configured assemble to order item followed by a list of features and options for the item
- If No, system prints only the item number for the configured assemble to order item

Print Sales Order Detail

Determines whether the order number and the order line number associated with the line items on the pre-shipper/shipper will be included.

- If Yes, the order number and order line number are included
- If No, they are not

Assign Shipper Number

Determines if the system assigns a shipper number to the pre-shipper.

- If Yes, system assigns shipper number to the pre-shipper
 - Converts pre-shipper into a shipper
- If No, system does not assign a shipper number to the pre-shipper

Display Quantity In SO UM

Determines which UM the system uses to display the quantity and UM for the item.

- If Yes, system displays the quantity and UM using the order UM
- If No, system displays the quantity and UM using the pre-shipper/shipper UM

Company Address

Determines the company address which prints at the top of the pre-shipper/shipper document.

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.

Exercise: Create Daily Pre-Shipper

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



- 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

Use Picklist/Pre-Shipper - Automatic 7.9.1

- 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 on page 320*) of this training guide to define the correct sequence numbers for pre-shippers and shippers.

- 3 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	Yes

Write pre-shipper number here: _____

Use Picklist/Pre-Shipper - Automatic 7.9.1

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

Field	Data
Ship-To	f001
To	f001
Details	Yes

Use Sequence Schedule Report 7.5.4.7

- 5 Verify all sequences for Monday are associated with pre-shipper number.
- 6 To check the sequence schedule enter the following:

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

Use Sequence Schedule Maintenance 7.5.4.5

- 7 Verify all sequences picked cannot be edited.

Exercise: Change Status to Offline

Description: 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.

- 1 To edit the pre-shipper enter:

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

Use Pre-Shipper/Shipper Workbench 7.9.2

- 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:

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

Use Sequence Schedule Maintenance 7.5.4.5

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

Field	Data
Date	<next Monday>
Customer Sequence	004
Item Number	part3
Customer Reference	1R004
Status	offline

Exercise: Change Status and Shipping Date

Description: 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.

- 1 Delete the pre-shipper by entering:

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

Use Pre-Shipper/Shipper Workbench 7.9.2

- 2 Advance to the Shipper Workbench, press F5 (Delete). An options frame displays.
- 3 Select 1 - Delete Pre-Shipper/Shipper.
- 4 Edit the sequence and mark it offline by entering:

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

Use Sequence Schedule Maintenance 7.5.4.5

- 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:

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

Use Picklist/Pre-Shipper - Automatic 7.9.1

- 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

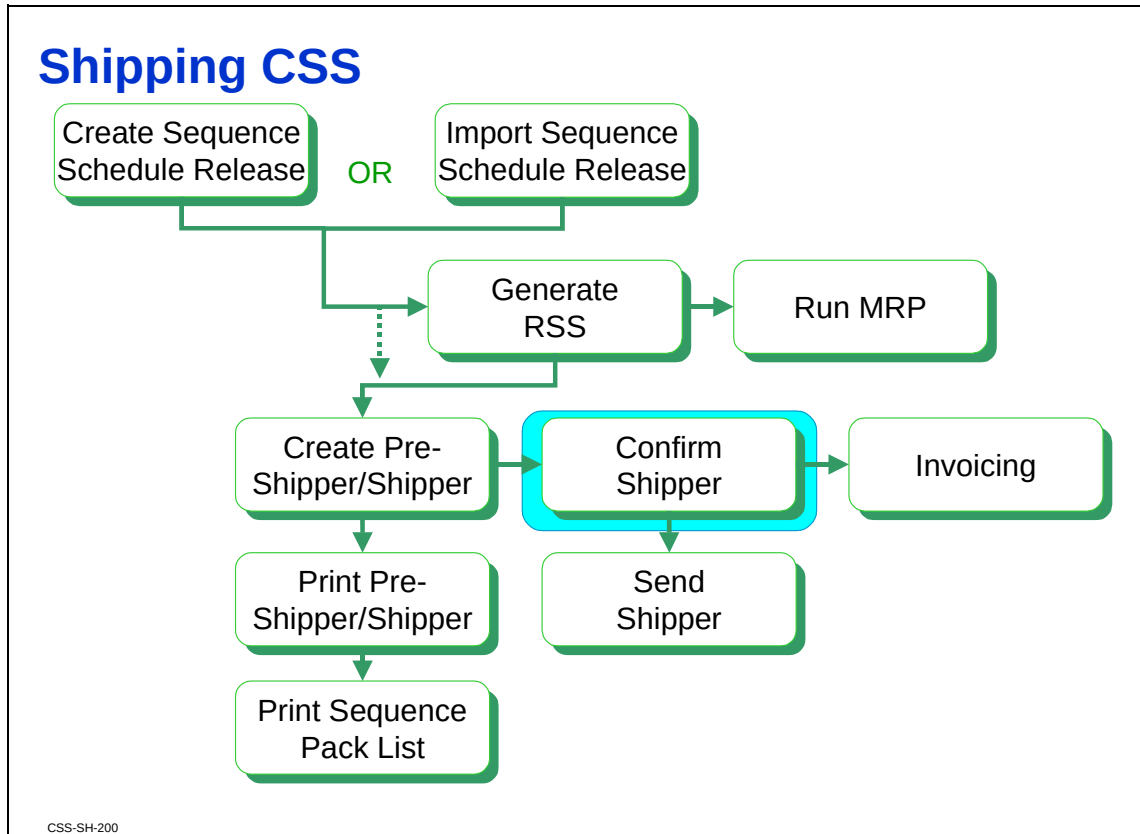
- 1 Print the pre-shipper and convert to shipper.

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

Use Pre-Shipper/Shipper Print 7.9.4

- 2 Verify the shipper contains the range of sequences.

Write shipper number here: _____

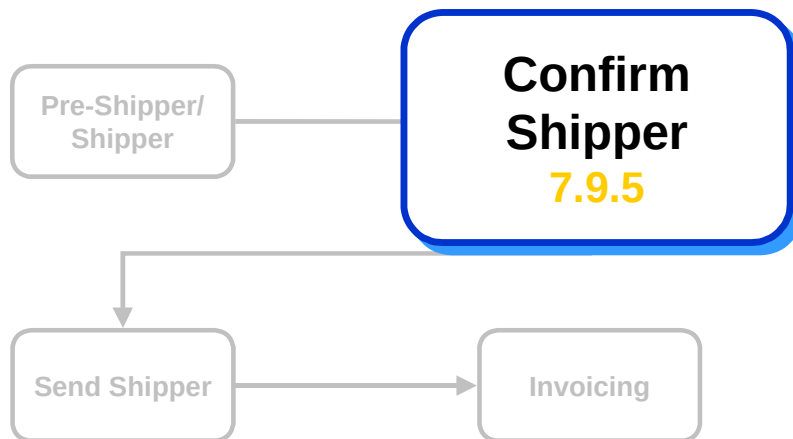


Confirm Shipper

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

Shipping CSS



CSS-SH-210

7.9.5 – Pre-Shipper/Shipper Confirm

Pre-Shipper/Shipper Confirm

User Menu Edit Queue Options Help

Ship-From: 002

Pre-Shipper/Shipper: Shipper

Number: 020797

Ship-To/Dock:

Ship Date: 07/15/97

Effective: 07/15/97

Default to system date

F1=Help F2=Go ESC=End *Next/Prev* Ctrl-X/C/V=Cut-Copy-Paste

CSS-SH-220

Pre-Shipper/Shipper Confirm

Menu Number 7.9.5

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

Field Definitions

Ship-From

The site shipping the shipment.

Pre-Shipper/Shipper

Enter the document you are confirming (i.e., pre-shipper or shipper).

- If confirming a pre-shipper, the system converts it to a shipper before beginning the confirmation process
 - The system displays a message box advising you that it is converting pre-shipper to shipper and shows you the shipper number

Number

Number identifying the pre-shipper or shipper you want to confirm.

Ship-To/Dock

The location receiving the shipment.

Ship Date

The last date the system processed a shipment for the scheduled order associated with this shipper.

- Defaults to the system date

Effective

The date of the shipment.

- Defaults to the system date

Handling Shipment Dates at a GL Period End

Usually the ship date and effective date of the shipment are the same. However, you can assign an effective date that is earlier or later than the actual ship date.

- Effective date must be in an open GL calendar period
- Useful if a GL period ends before all shipments from that period have been fully processed

If you are not automatically posting and printing the invoice at confirmation, make sure the same date is used for:

- Effective Date in Pre-Shipper/Shipper Confirm
- Invoice Date in Invoice Print 7.13.3
- Effective Date in Invoice Post 7.13.4

If you use different dates, your shipment history for the GL period will not correspond to the Accounts Receivable and GL balances.



Discussed in the following Training Guide: Period End Processing

7.9.5 – Pre-Shipper/Shipper Confirm: Invoice Options

The screenshot shows a window titled "Pre-Shipper/Shipper Confirm" with a menu bar (User Menu, Edit, Queue, Options, Help) and a toolbar. The main area contains the following information:

Ship-From: 10000 nj plant
 Pre-Shipper/Shipper: Shipper
 Number: SHP00106

Ship-To/Dock: 001 PEI Computers Ltd.
 37 Atlantic Road

Ship Date: 09/09/99
 Effective: 09/09/99

The "Invoice Options" section is highlighted with a blue box and contains the following fields:

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

At the bottom, a message states: "No help available for this field l_calc_freight (Used: <l_calc_freight> and <l_calc_freight, rcsois>)."

The status bar at the bottom displays: F1=Help F2=Go ESC=End *Next/Prev* Ctrl-X/C/V=Cut-Copy-Paste

CSS-SH-230

Invoice Options Frame

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

Field Definitions

Post Invoice

The confirmation process can perform the first step in invoicing. The value defaults from the Auto Inv Post field set in Scheduled Order Maintenance.

Note You can override this setting for individual shippers.

- If Yes, confirmation automatically posts the invoice to the customer's AR account

- The system uses the Shipper ID/ASN number as the invoice number
- You have the option of printing the invoice during the confirmation process
- You can print the invoice later using Closed Invoice Reprint 7.13.12 or Invoice Export 35.8
- If No, you follow the normal invoice process, manually printing and posting the invoice
 - You use Invoice Print 7.13.3 to print the invoice and Invoice Post 7.13.4 to post the invoice

Use Shipper Nbr for Inv

Determines what number the system is to use for the invoice being generated by this shipment. Defaults from the Customer Schedules Control File, but can be overridden.

- If Yes, the shipper number is used as the invoice number
- If No, the next available invoice number is used

Consolidate Invoices

Has no effect on customer schedules.

Note If Use Shipper Nbr for Inv is set to Yes, then Consolidate Invoices must also be set to Yes.

Calculate Freight

Determines if the system recalculates the freight charges for all scheduled orders attached to the shipper being confirmed.

- If Yes, the system recalculates freight charges
- If No, the system does not recalculate freight charges

After you complete entering all information, the system prompts you twice. The first is to ask if all information is correct. The second is to ask if you want to print the invoice.

Note You can print the invoice before you post the invoice. However, if printing and posting are not simultaneous, posting information can be consolidated and therefore not match the invoice.

7.9.5 – Pre-Shipper/Shipper Confirm: **Print Options**

Pre-Shipper/Shipper Confirm

User Menu Edit Queue Options Help

Ship-From: 10000 San Diego Main Plant
 Pre-Shipper/Shipper: Pre-Shipper
 Number: 00000001

Ship-To/Dock: f001 Explorer Assembly Plant

Ship Date: 02/14/01
 Effective: 02/14/01

Print Only Lines to Invoice: Invoice Date: 02/14/01
 Print Lot/Serial Numbers Shipped:
 Print Features and Options:
 Company Address: 10000000 Form Code: 1
 Discount Detail: None
 Discount Summary: None

Message:

Output:

Enter data or press ESC to end.

CSS-SH-240

Print Options

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

Print Only Lines to Invoice

Determines which lines print.

- If Yes, only lines with a non-zero quantity to invoice print
- If No, all lines print
 - Default

Invoice Date

Specifies the date to use on the invoice.

- Defaults to the system date

Print Lot/Serial Numbers Shipped

Determines if the lot/serial numbers print for each line item shipped.

- If Yes, each shipped line item's lot/serial numbers print
- If No, only the total quantity shipped for each line item prints
 - Default

Print Features and Options

Determines if a list of features and options prints.

- If Yes, system prints each configured assemble to order item followed by a list of features and options for the item
- If No, system prints only the item number for the configured assemble to order item
 - Default

Company Address

Determines the company address which prints at the top of the pre-shipper/shipper document.

Discount Detail

Specify if there is a discount detail by entering:

- An amount to show discount detail expressed as the currency amount
- Nothing to show no discount detail
 - Default
- A percent to show discount detail expressed as a percentage of the list price

Discount Summary

Specify if there is a discount summary by entering:

- An amount to show discount detail expressed as the currency amount
- Nothing to show no discount detail
 - Default
- A percent to show discount detail expressed as a percentage of the list price

Message

Enter a message to print at the bottom of the invoice.

Form Code

Use to specify the format for printing the invoice.

- Defaults to 1, standard format

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

Exercise: Confirm the Shipper

- 1 Confirm the shipper by entering:

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

Use Pre-Shipper/Shipper Confirm 7.9.5

- 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

Description: 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.

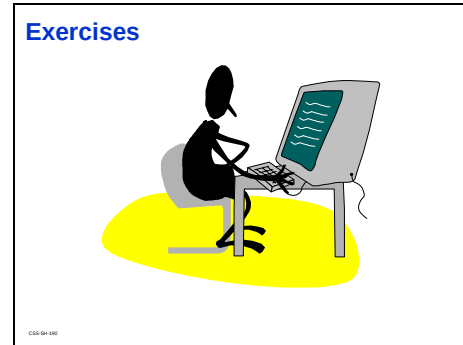
- 1 Create pre-shipper for the day by entering:

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

Use Sequence Pre-Shipper - Automatic 7.5.4.10

- 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:

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

Use Pre-Shipper/Shipper Workbench 7.9.2

- 5 Verify that only offline sequences are available for Monday.

Write pre-shipper number here: _____

Exercise: Confirm Shipper

- 1 Confirm the shipper by entering:

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

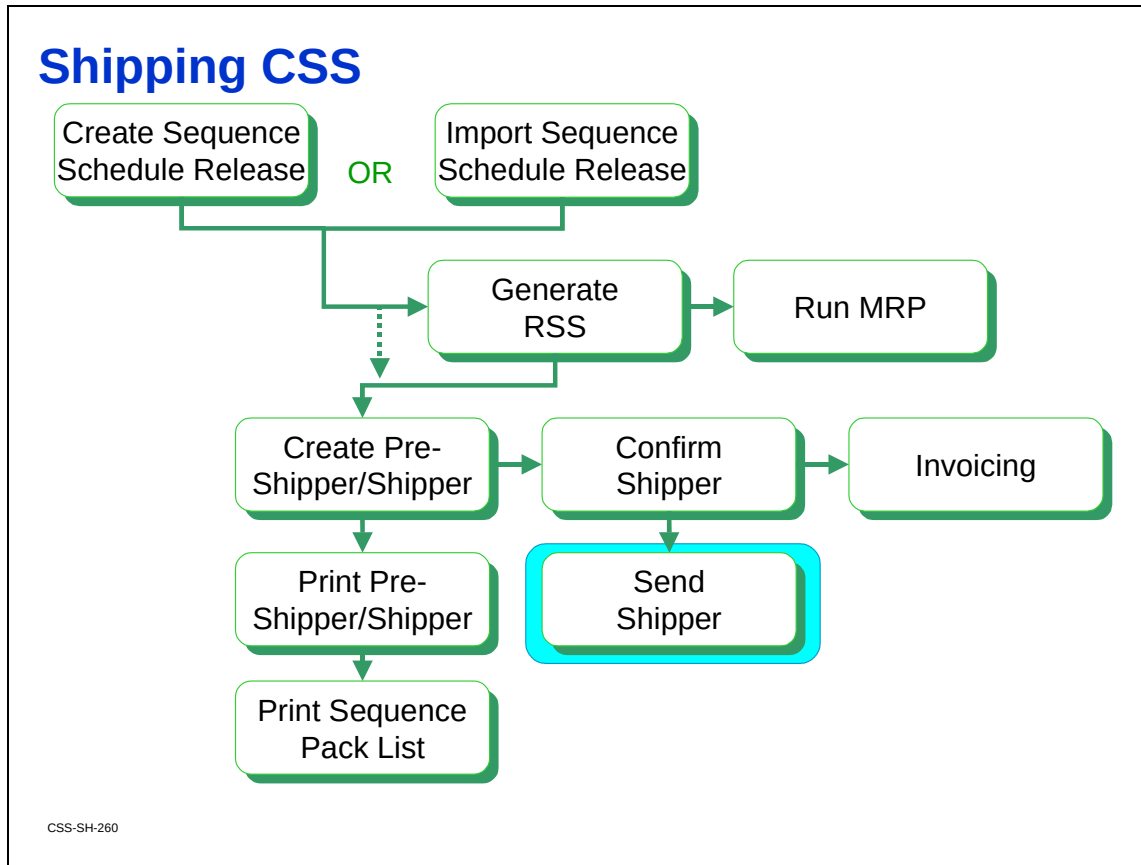
Use Pre-Shipper/Shipper Confirm 7.9.5

- 2 Advance to the invoice data frame and enter:

Field	Data
Post Invoice	Yes
Print Invoice	Yes

- 3 Verify the invoice contains the range of sequences.

Write invoice number here: _____

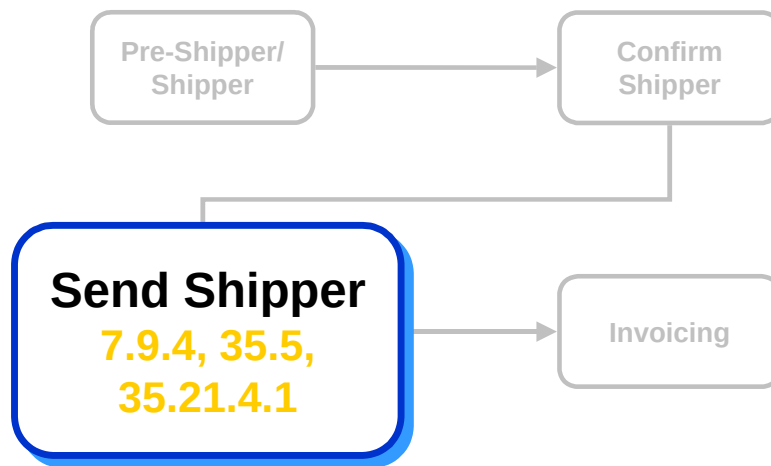


Send Shipper

MFG/PRO 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

Shipping CSS



CSS-SH-270

7.9.4 – Pre-Shipper/Shipper Print

Pre-Shipper/Shipper Print

User Menu Edit Queue Options Help

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:

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 SO UM:

Company Address:

Output:

Batch ID:

F1=Help F2=Go ESC=End Ctrl-X=Cut Ctrl-C=Copy Ctrl-V=Paste

CSS-SH-280

Pre-Shipper/Shipper Print

Menu Number 7.9.4

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

Selection Criteria

Ship-From / Ship-To/Dock / Number / Inventory Movement Code / Document Format / Language / Address List Type / Carrier

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

Print Options

Print Pre-Shippers/Shippers

Determines what is printed.

- If Pre-Shipper, only pre-shippers are printed
 - Default
- If Shipper, only shippers are printed

Include Printed Pre-Shippers/Shippers

Determines if printed pre-shippers or shippers will be re-printed.

- If Yes, pre-shippers and shippers already printed will print again
- If No, pre-shippers and shippers already printed will not print
 - Default

Print Features and Options

Determines if a list of features and options prints.

- If Yes, system prints each configured assemble to order item followed by a list of features and options for the item
- If No, system prints only the item number for the configured assemble to order item
 - Default

Assign Shipper Numbers

Determines if the system assigns a shipper number to selected pre-shippers.

- If Yes, system assigns shipper number to selected pre-shippers
 - Default
 - Converts pre-shipper into a shipper
- If No, system does not assign a shipper number to selected pre-shippers

Shipper Sequence ID

Number Range Management (NRM) sequence code used for the pre-shippers/shippers you are printing.

- Defaults to <blank>
 - All pre-shippers/shippers print, regardless of their assigned sequence code

Include Pre-Shipper/Shipper Comments

Determines if pre-shipper/shipper comments print.

- If Yes, comment print on the selected documents
 - Default
- If No, comments do not print

Include Sales Order Packing List Comments

Determines if sales order packing list comments print.

- If Yes, comment print on the selected documents
 - Default
- If No, comments do not print

Print Sales Order Detail

Determines whether the order number and the order line number associated with the line items on the pre-shipper/shipper will be included.

- If Yes, the order number and order line number are included
- If No, they are not
 - Default

Display Quantity In SO UM

Determines which UM the system uses to display the quantity and UM for the item.

- If Yes, system displays the quantity and UM using the order UM
- If No, system displays the quantity and UM using the pre-shipper/shipper UM
 - Default

Company Address

Determines the company address which prints at the top of the pre-shipper/shipper document.

Output

Specifies where to send the report output. The output can be a:

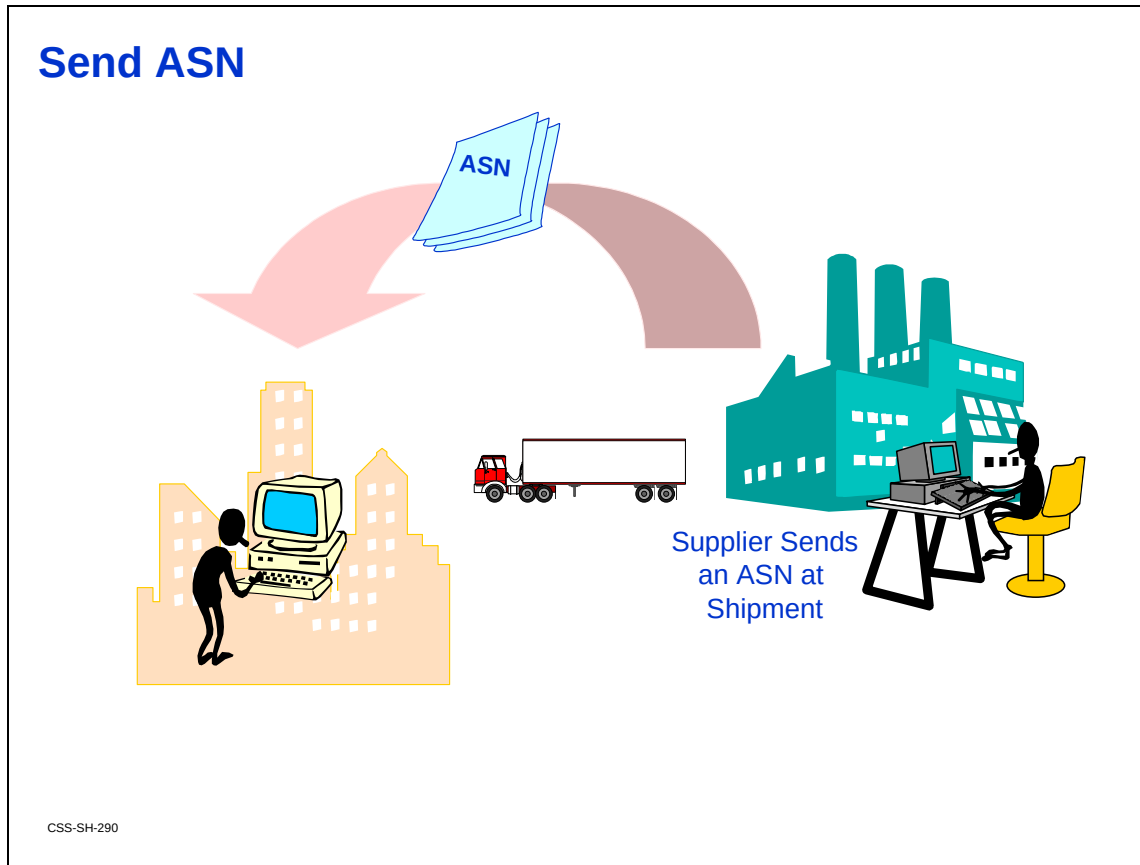
- Printer
- Terminal (Character)
- Window (GUI)
- File name

Normally, a report prints 132 characters across the page. On a standard screen, the report wraps. If your screen supports compressed print mode, modify the printer settings in Printer Setup Maintenance 36.13.2.

Batch ID

Specifies the batch ID.

- System takes the report request and puts it in a queue for later batch processing
- Optional



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

35.5 – ASN Export

The screenshot shows the 'ASN Export' window. A red box highlights the text 'Must be enabled to receive EDI ASNs' with an arrow pointing to the 'Ship-To/Dock: f001' field. The window contains the following information:

Ship-From Site: 10000	San Diego Main Plant
Shipper ID: 10000-01-100000	
Ship-To/Dock: f001	Explorer Assembly Plant
Ship Date: 02/12/01	Arrive Date: 02/12/01
Ship Time: 13:20:00	Arrival Time: 13:20:00

Below the table, there are input fields for:

- Export to File or Process:
- Export Directory/Process Name:
- Export File Name:

The status bar at the bottom shows: F1=Help F2=Go ESC=End *Next/Prev* Ctrl-X/C/V=Cut-Copy-Paste

CSS-SH-300

ASN Export

Menu Number 35.5

Use ASN Export to electronically transmit the ASN to the customer. The system exports one ASN at a time. The shipment number becomes the ASN number.

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.

The ASN provides shipment detail such as:

- Purchase order and order line number
- Supplier and customer item numbers

- Authorization numbers, if available
- Item(s) shipped
- Quantities shipped
- Cumulative quantities
- Arrival date and time

It is not uncommon for a customer to plan the shipment quantities directly into their production line based on the ASN, with no receipt processing and no inspection.

Field Definitions

Ship-From Site

The site sending the shipment.

Shipper ID

Number identifying the shipper.

Ship-To/Dock

The ship-to or dock address where the deliveries are to be made. Frequently this is the point on the production line where the shipped items are going to be used. Their arrival time is coincident with the item the first item is needed for production.

Ship Date

Date on which the shipment was physically shipped.

- Defaults to the date the shipper was confirmed

Ship Time

Time on which the shipment was physically shipped.

Arrive Date

Date on which the shipment will physically arrive.

- Defaults to the date the shipper was confirmed

Arrival Time

Time on which the shipment will physically arrive.

Export to File or Process

Indicates the destination type.

- Defaults to the value specified in the Export to File or Process field in the EDI Control File 35.24

Export Directory/Process Name

Indicates the path to the export directory or process.

- Defaults to the value specified in the Export Directory/Process Name field in the EDI Control File
- If not, defaults to <blank>

Export File Name

Indicates the destination file name.

Note If Use Auto File Naming is set to Yes in the EDI Control File, you do not have to specify a file name.

35.21.4.1 – Shipment ASN Export

Shipment ASN Export

User Menu Edit Queue Options Help

Shipper: To:

Ship-From: To:

Ship-To/Dock: To:

Inventory Movement Code: To:

Ship Date: To:

Include Confirmed Shippers Only:

Print Details:

Update/Export:

EDI Batch No.:

Output:

F1=Help F2=Go ESC=End Ctrl-X=Cut Ctrl-C=Copy Ctrl-V=Paste

CSS-SH-310

Shipment ASN Export

Menu Number 35.21.4.1

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 MFG/PRO data to the format required by receiving party's EC subsystem

Selection Criteria

Shipper / Ship-From / Ship-To / Dock / Inventory Movement Code

Specify ranges of selection criteria for the system to use in selecting ASNs for export.

Field Definitions

Include Confirmed Shippers Only

Determines which shippers are included in the selection.

- If Yes, only confirmed shippers are selected
 - Default
- If No, all shippers are included

Print Details

Determines the level of detail on the report generated when this program executes.

- If Yes, error and warning message detail is included on the report
 - Default
- If No, report is limited to higher-level summary information

Update/Export

Indicates if you want to edit certain fields before exporting.

- If Update, allows you to edit fields on outbound ASNs or invoices
 - Any updates you make only affect the outbound documents, not the database
- If Export, system exports the documents selected
 - Default

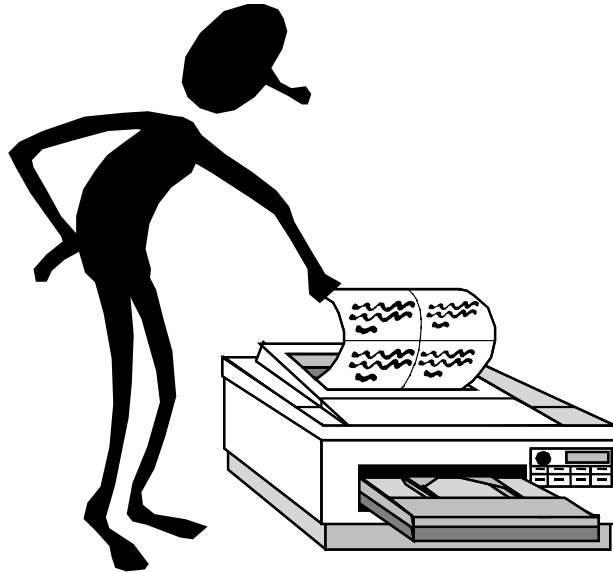
Note If you update fields, you must run the program twice. The first time set to Update to make the changes, then run a second time set to Export to export the documents.

EDI Batch No.

To re-export a group of documents, enter the batch number assigned to the group.

- When exporting a new group of documents, leave this field set to zero
- The system assigns a new batch number to each group of exported documents

Print Shipper Report



CSS-SH-320

Print Shipper Report

7.5.4.11 – Sequence Shipper Report

Sequence Shipper Report

User Menu Edit Queue Options Help

Ship-From:

Ship-To:

Pre-Shipper/Shipper:

Item Number:

Customer Job:

Customer Sequence:

Customer Reference:

Ship/Delivery Date:

Status:

Sales Order:

To:

To:

To:

To:

To:

To:

To:

To:

To:

To:

Pre-Shipper/Shipper:

Confirmed:

Output:

Batch ID:

F1=Help F2=Go ESC=End Ctrl-X=Cut Ctrl-C=Copy Ctrl-V=Paste

CSS-SH-330

Sequence Shipper Report

Menu Number 7.5.4.11

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

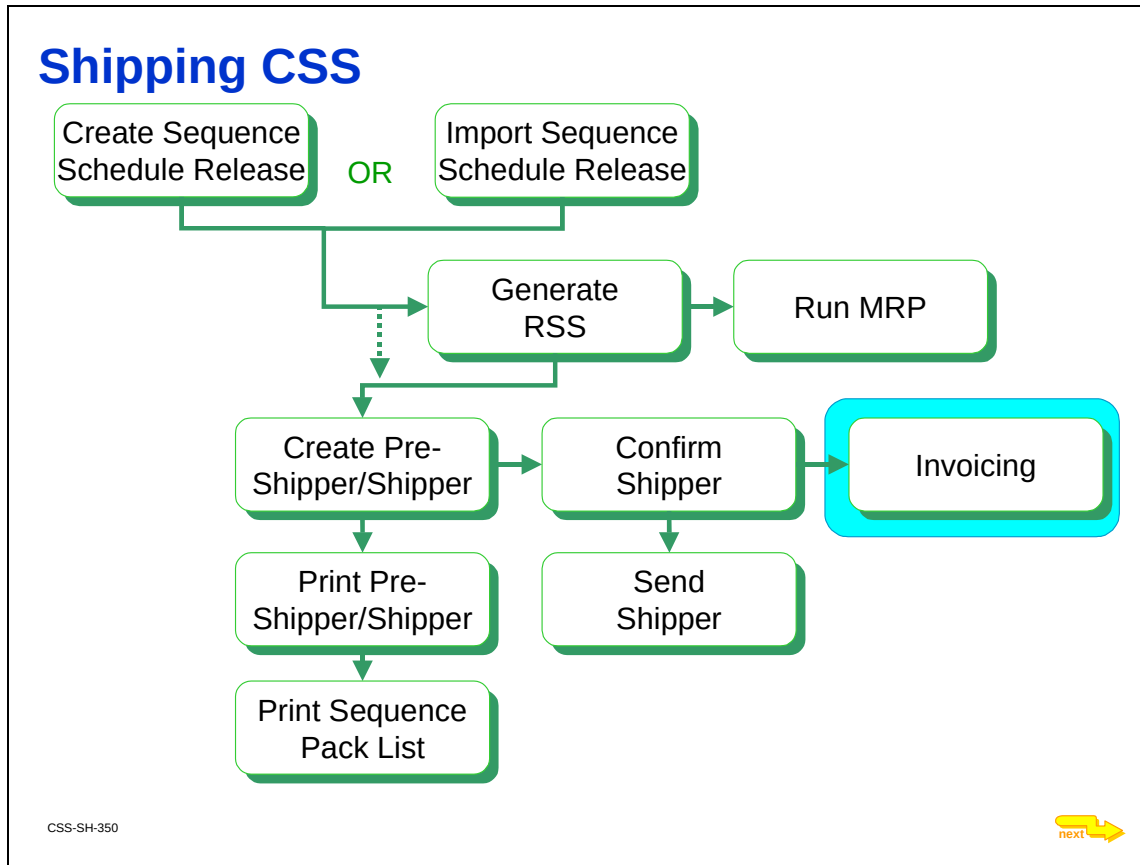
- Allows you to see the shipper’s contents

7.5.4.11 – Sequence Shipper Report: **Sample Report**

rcsqrp03.p		7.5.4.11 Sequence Shipper Report					Date: 02/01/00	
Page: 1		Public Test Progress 91					Time: 16:03:05	
Type	Ship-to Shipper	Confirmed	Customer Job Customer Sequence	Site	Item Number	Quantity UM	Ship/Delivery Date	Status
SHIPPER	01000036	yes	20000128	10000	88-100	1.0 EA	01/28/00	
	00000006		001				10:00	
SHIPPER	01000036	yes	20000128	10000	88-100	1.0 EA	01/28/00	
	00000006		002				10:00	
SHIPPER	01000036	yes	20000128	10000	88-100	1.0 EA	01/28/00	
	00000006		003				10:00	
SHIPPER	01000036	yes	20000128	10000	88-100	1.0 EA	01/28/00	
	00000006		004				10:00	
SHIPPER	01000036	yes	20000128	10000	88-100	1.0 EA	01/28/00	
	00000006		005				10:00	

CSS-SH-340

The above shows an example of the Sequence Shipper Report.



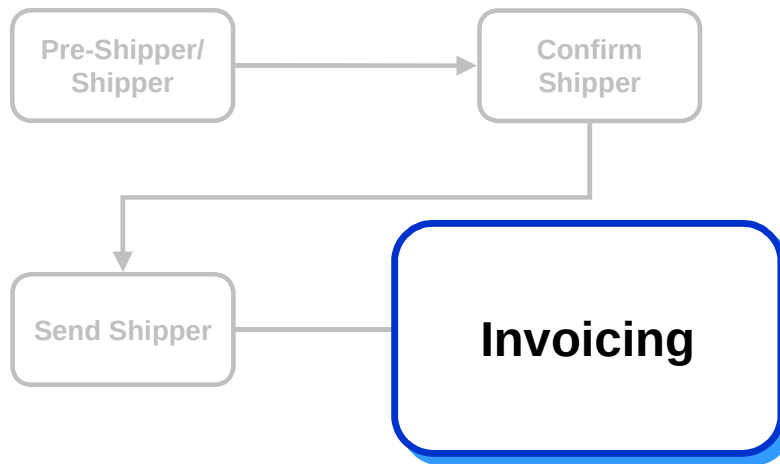
Invoicing

Confirming the shipper flags the order as ready for invoicing.

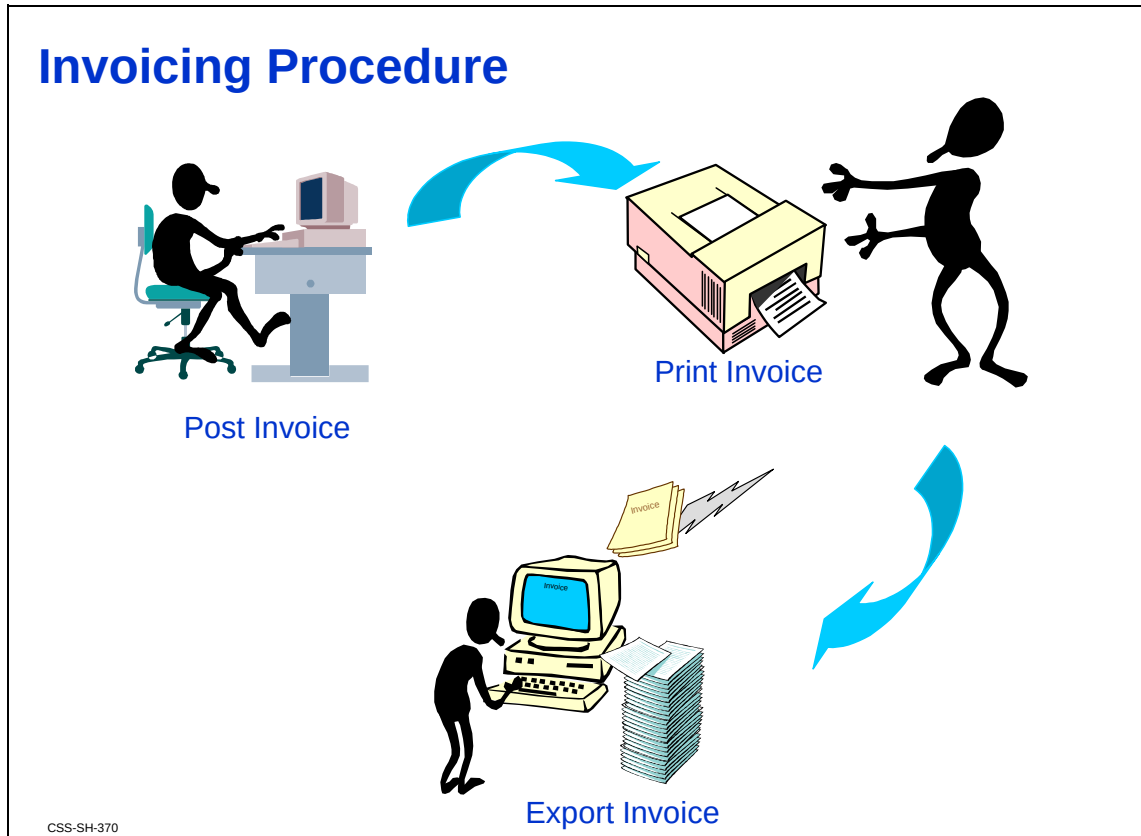
MFG/PRO gives you two options for sending the invoice your customer. You can:

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

Shipping CSS



CSS-SH-360



Invoicing Procedure

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

Post Invoice

During the confirmation process in Pre-Shipper/Shipper Confirm 7.9.5, you have two options for posting the invoice.

- To automatically post the invoice, set the Post Invoice field to Yes
 - The confirmation process automatically posts the invoice to the customer's Accounts Receivable (AR) account
- To manually post an invoice, set the Post Invoice field to No
 - Use Invoice Post 7.13.4 to manually post the invoice

Note The Post Invoice field setting defaults from the Auto Inv Post setting set in Scheduled Order Maintenance 7.3.13. It can be overridden for individual shippers.

When you post an invoice:

- System checks to see if there are any sequences associated with the invoice
- If there are, system updates the sequence shipper records with the invoice number being posted

Print Invoice

You have two options for printing an invoice:

- During the confirmation process in Pre-Shipper/Shipper Confirm 7.9.5, you can print the invoice at the time you confirm the shipper
- To manually print the invoice, use Invoice Print 7.13.3
 - Can print a single invoice or a range of invoices

Note You can also print the invoice using Closed Invoice Reprint 7.13.12.

The sequence range prints on the invoice if the Print Sequence Range on Invoice 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

Export Invoices

To export the invoice you can use:

- Invoice Export 35.8
 - EDI

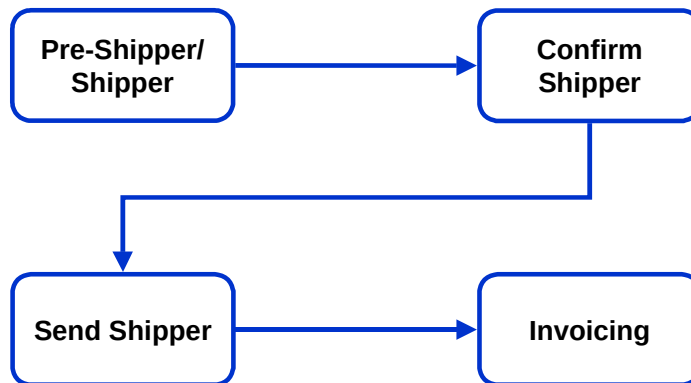
Note To export an invoice using EDI, the EDI Inv Hist flag should be set to Yes in Trading Partner Parameters Maintenance 35.1 and in Scheduled Order Maintenance 7.3.13.

- Invoice Export 35.21.4.3
 - ECommerce

The invoice includes sequence information if the Send Sequences with Invoice field is set to Yes the:

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

Shipping CSS Summary



CSS-SH-380



Course Overview

- ✓ Introduction to Customer Sequence Schedules
- ✓ Business Considerations
- ✓ Set up Customer Sequence Schedules
- ✓ Load Customer Sequence Schedules
- ✓ Plan Customer Sequence Schedules
- ✓ Ship Customer Sequence Schedules
- ◆ Customer Sequence Schedules Features and Options

CSS-SH-390

CHAPTER 7

Features and Options





CSS Features and Options

In this section you learn how to:

- ✓ Identify some key business considerations before setting up CSS in MFG/PRO
- ✓ Set up CSS in MFG/PRO
- ✓ Loading CSS in MFG/PRO
- ✓ Planning CSS in MFG/PRO
- ✓ Shipping CSS in MFG/PRO

✓ CSS Features and Options

CSS-FE-010

Features and Options

Features and Options

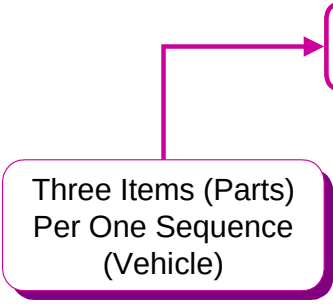
- ↔ Multi-Item Sequences
- ↔ Multiple Delivery Locations
- ↔ Deleting Sequences
- ↔ Sequence Cross-Reference
- ↔ Cumulative Quantities



CSS-FE-020

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

Multi-Item Sequences



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

Multi-Item Sequences

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

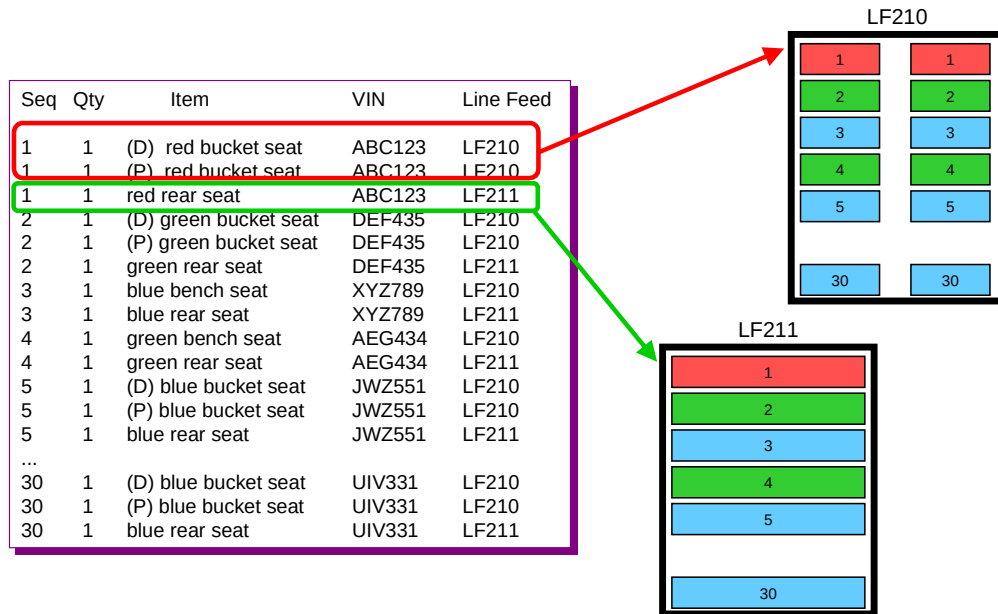
Using the above example for seat sets in a single vehicle:

- 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



CSS-FE-040

Multiple Delivery Locations

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.

CSS allows the customer to specify a dock (or a line feed location) for each part (item). In CSS 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.

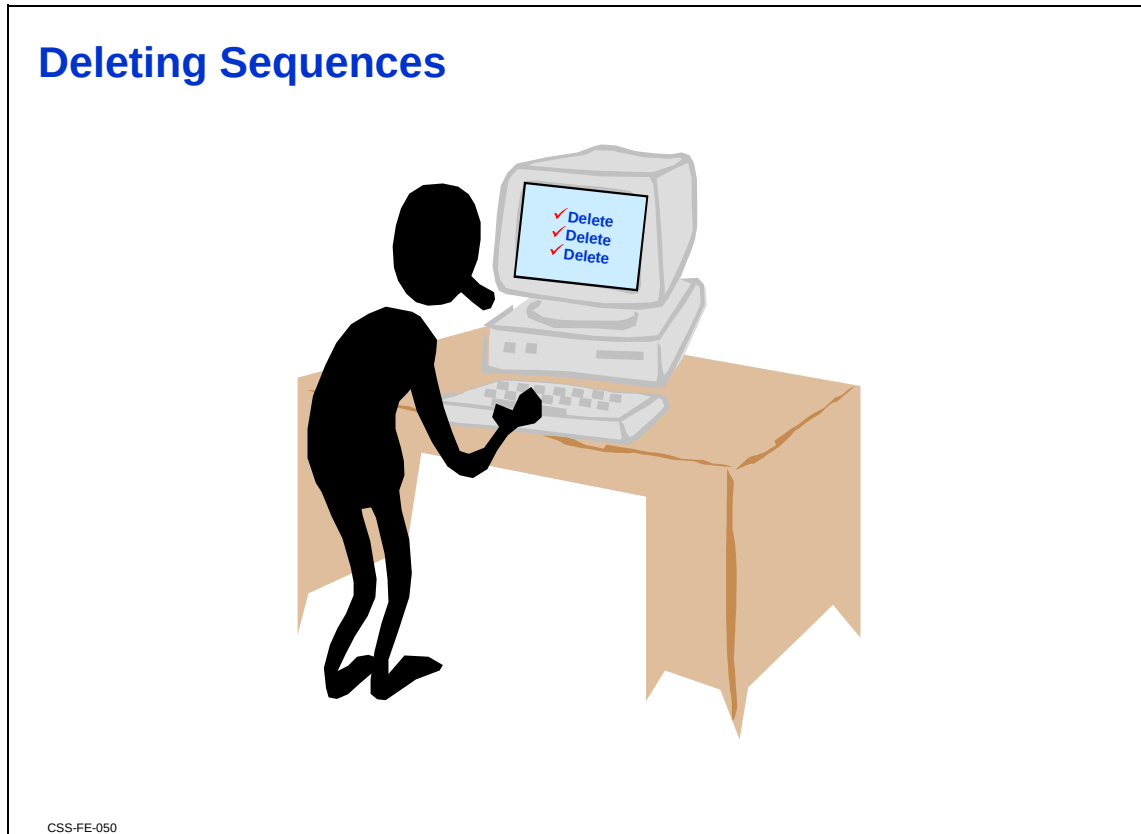
When a dock or line feed location is designated in CSS, it tells MFG/PRO two things:

- 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 CSS these delivery locations (i.e., dock and line feed) are strictly customer internal locations. MFG/PRO 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

MFG/PRO 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

7.5.4.5 – Sequence Schedule Maintenance

The screenshot shows the 'Sequence Schedule Maintenance' window. At the top, it displays 'Ship-From: 10000 nj plant', 'Ship-To: 01000036 Northwest Reliable', and 'Release ID: 1'. Below this, the 'Sequence Detail Data' section contains fields for Date (01/28/00), Time (10:00), Customer Job (20000128), Customer Sequence (001), Order (so2077), Line (1), UM (EA), Item Number (88-100), CASE_AUTO-UNIT, PO Number, Customer Reference (1R1234XYZ001), Customer Dock, Line Feed, Picked (no), and X-Ref (no). At the bottom, there are input fields for Quantity (1.0), Cum Quantity (0.0), Customer Item, Customer Build Date (//), Status, and a 'Delete: no' checkbox. A blue callout box with an arrow points to the 'Delete: no' checkbox, containing the text 'Set to Yes to Mark as Deleted'. The bottom status bar shows keyboard shortcuts: F1=Help, F2=Go, ESC=End, *Next/Prev*, Ctrl-X/C/V=Cut-Copy-Paste.

CSS-FE-060

Sequence Schedule Maintenance

Menu Number 7.5.4.5

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

7.5.4.22 – Sequence Schedule Detail Delete

Sequence Schedule Detail Delete

User Menu Edit Queue Options Help

Ship-From: To:

Ship-To: To:

Release ID: To:

Customer Job: To:

Customer Sequence: To:

Customer Reference: To:

Item Number: To:

Order: To:

PO Number: To:

Status: To:

Ship/Delivery Date: / : To: / :

Include Deleted Only:

Update:

Output:
Batch ID:

F1=Help F2=Go ESC=End Ctrl-X=Cut Ctrl-C=Copy Ctrl-V=Paste

CSS-FE-070

Sequence Schedule Detail Delete

Menu Number 7.5.4.22

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

Field Definitions*Include Deleted Only*

Determines which sequence records are to be deleted.

- If Yes, only records flagged in Sequence Schedule Maintenance as delete (Delete flag set to Yes) will be selected and deleted
 - Default value
- If No, the entire schedule will be deleted
 - You do not have to set individual sequence records to Delete in Sequence Schedule Maintenance

7.5.23 – Schedule Delete/Archive

The screenshot shows the 'Schedule Delete/Archive' window. A callout box with the text 'Determines if Sequences are Included' has an arrow pointing to the 'Sequence' field under the 'Include Schedule Type' section. The 'Sequence' field is currently set to 'no'.

Schedule Delete/Archive

User Menu Edit Queue Options Help

Selection Criteria

Ship-From: [] To: []
 Sold-To: [] To: []
 Ship-To: [] To: []
 Dock: [] To: []
 Item Number: [] To: []
 PO Number: [] To: []
 Order: [] To: []
 Created: [/ /] To: [/ /]

Sort Option: **1**
 1 - By Ship-From, Customer, Ship-to, Order, Dock, Item, PO
 2 - By Item, Ship-From, Customer, Ship-to, Order, Dock, PO

Include Schedule Type

1 - Plan: **yes**
 2 - Ship: **no**
 3 - Required Ship: **no**
Sequence: no

Inactive Schedule Only: **yes**
Detail Only: **no**
Delete: **no**

Archive: **no** Archive File: []

Clear Print Exit

F1=Help F2=Go ESC=End Ctrl-X=Cut Ctrl-C=Copy Ctrl-V=Paste

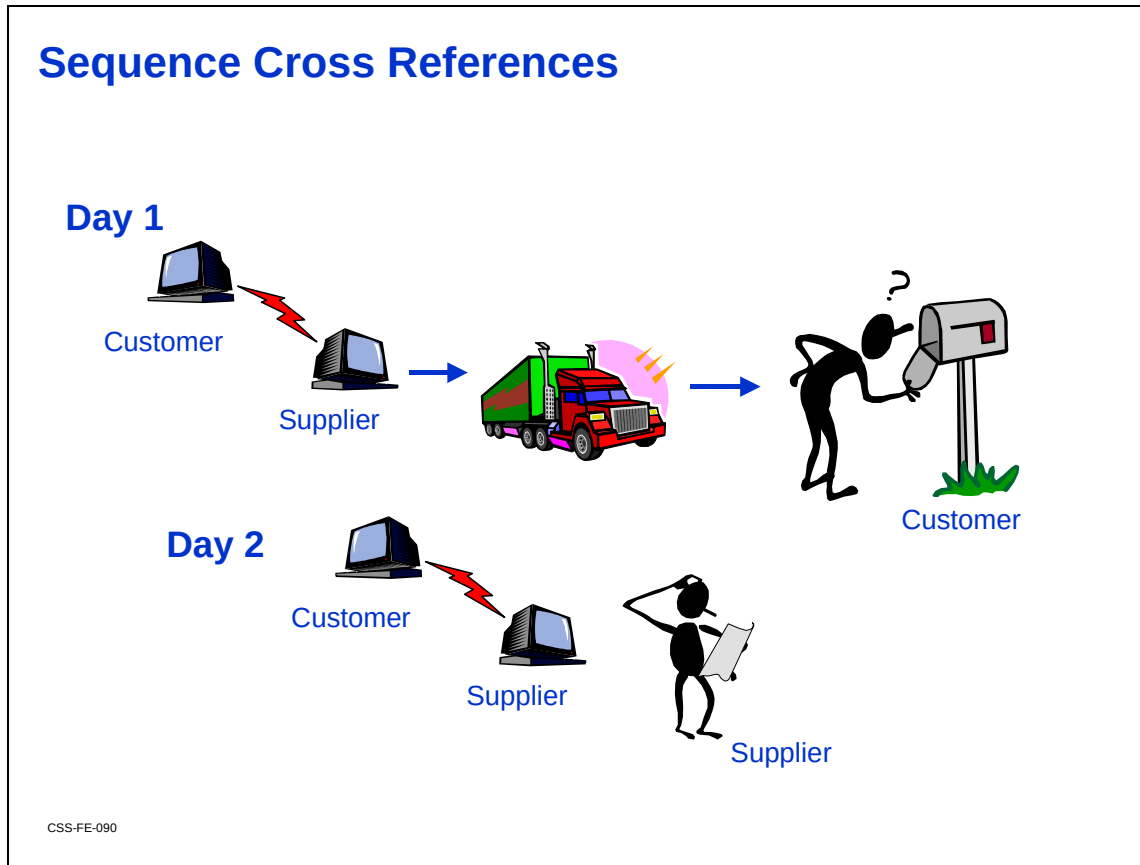
CSS-FE-080

Schedule Delete/Archive

Menu Number 7.5.23

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

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

7.5.4.5 – Sequence Schedule Maintenance

Sequence Schedule Maintenance

User Menu Edit Queue Options Help

Ship-From: 10000 nj plant
 Ship-To: 01000036 Northwest Reliable
 Release ID: 1 Active: no

Sequence Detail Data

Date: 01/28/00 Time: 10:00
 Customer Job: 20000128
 Customer Sequence: 001
 Order: so2077 Line: 1 UM: EA
 Item Number: 88-100 CASE_AUTO-UNIT
 PO Number:
 Customer Reference: 1R1234XYZ001
 Customer Dock:
 Line Feed:
 Quantity: 1.0 Cum Quantity: 0.0
 Customer Item:
 Customer Build Date: / / Status: Delete: no

Picked: no
 X-Ref: no

F1=Help F2=Go ESC=End *Next/Prev* Ctrl-X/C/V=Cut-Copy-Paste

CSS-FE-100

Sequence Scheduled Maintenance

Menu Number 7.5.4.5

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

7.5.4.13 – Sequence Cross-Ref Maintenance

Sequence Cross-Ref Maintenance

User Menu Edit Queue Options Help

Ship-From: 10000 Ship-To: 866-1

Picked/Shipped Sequence

Shipped Release ID: 1

Shipped Job: job1

Shipped Sequence: seq1

Shipped Item Number: 866-item1

Shipped Reference: vin100

Shipped Dock: dock1

Shipped Line Feed: line1

Scheduled Date: 12/07/99 Scheduled Time: 08:00

Picked: yes Shipped: yes Shipper ID: shp99070

F1=Help F2=Go ESC=End *Next/Prev* Ctrl-X/C/V=Cut-Copy-Paste

CSS-FE-110

Sequence Cross-Ref Maintenance

Menu Number 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.

7.5.4.13 – Sequence Cross-Ref Maintenance: Linked Sequence Frame

The screenshot shows a software window titled "Sequence Cross-Ref Maintenance". At the top, there is a menu bar with "User Menu", "Edit", "Queue", "Options", and "Help". Below the menu bar is a toolbar with several icons. The main area of the window is divided into two sections. The top section contains two labels: "Ship-From: 10000" and "Ship-To: 866-1". Below this is a section titled "Linked Sequence". This section contains several input fields with labels: "Release ID:" (with a value of "2"), "Customer Job:" (with a value of "job1"), "Customer Sequence:" (with a value of "seq1"), "Item Number:" (with a value of "866-item1"), "Customer Reference:" (with a value of "vin400"), "Customer Dock:" (with a value of "dock1"), "Line Feed:" (with a value of "line1"), "Date:" (with a value of "12/07/99"), and "Time:" (with a value of "09:00"). At the bottom of the window, there is a status bar with the text "F1=Help F2=Go ESC=End F5=Delete Ctrl-X/C/V=Cut-Copy-Paste".

CSS-FE-120

Linked Sequence Frame

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

7.5.4.14 – Sequence Cross-Ref Report

Sequence Cross-Ref Report

User Menu Edit Queue Options Help

Ship-From: To:

Ship-To: 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:

F1=Help F2=Go ESC=End Ctrl-X=Cut Ctrl-C=Copy Ctrl-V=Paste

CSS-FE-130

Sequence Cross-Ref Report

Menu Number 7.5.4.14

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

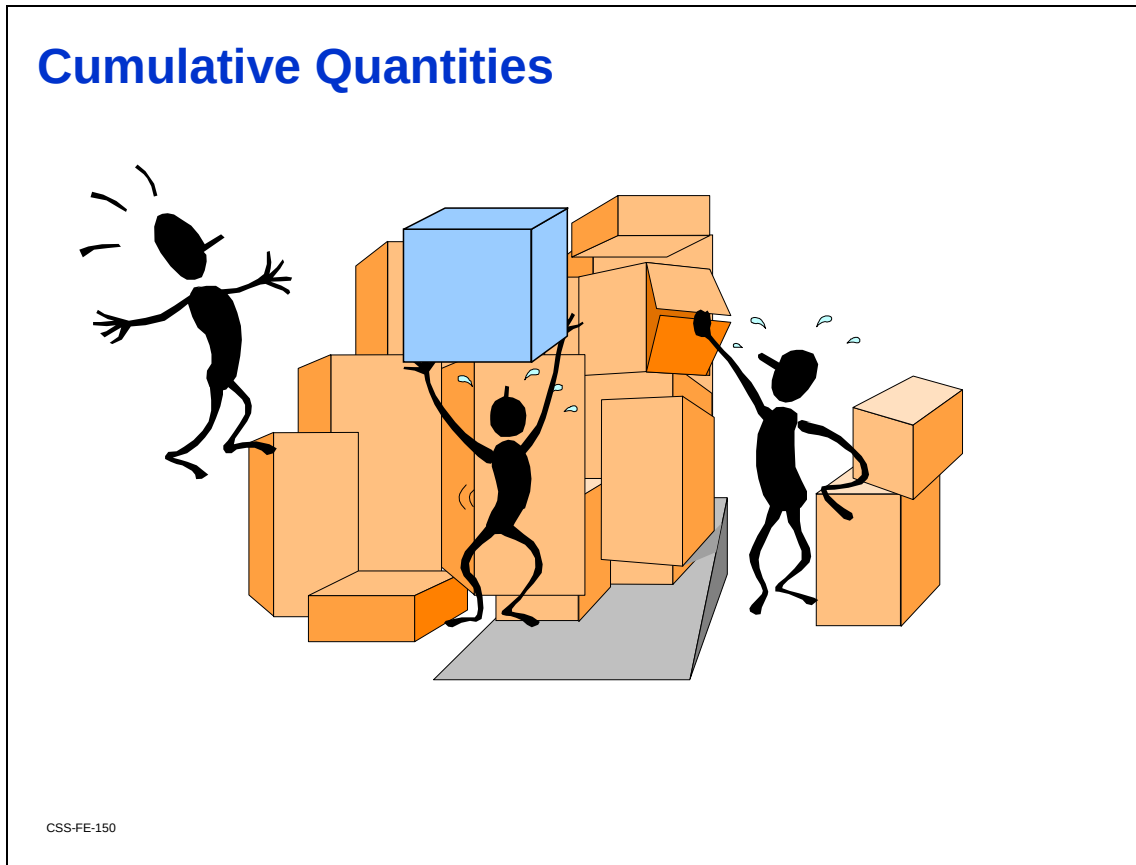
- Manually
- Automatically when sequences are imported used:
 - EDI
 - ECommerce
 - Shipper Gateway

7.5.4.14 – Sequence Cross-Ref Report: Sample Report

rcsgsrxp.p	7.5.4.14 Sequence Cross-Ref Report	Date: 02/01/00
Page: 1	Public Test Progress 91	Time: 17:01:42
Ship-From: 10000 nj plant		
Ship-To: 866-1 Customer		
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		

CSS-FE-140

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



Cumulative Quantities

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

Cumulative Quantities (continued)

Sequence Schedule Maintenance

User Menu Edit Queue Options Help

Ship-From: 10000 nj plant
 Ship-To: 01000036 Northwest Reliable
 Release ID: 1 Active: yes

Create Date: 01/28/00 10:54
 Cumulative: **yes**
 Packing Order: forward
 Sequences Per Container: 2
 Check Sequence Tolerance: yes
 Maximum Tolerance: 2
 Schedule Date Type: Delivery
 Active Start: 01/28/00
 Active End: / /

WARNING: MODIFYING THE ACTIVE SCHEDULE RELEASE.

F1=Help F2=Go ESC=End F5=Delete Ctrl-X/C/V=Cut-Copy

Sequence Schedule Maintenance

User Menu Edit Queue Options Help

Ship-From: 10000 nj plant
 Ship-To: 01000036 Northwest Reliable
 Release ID: 1 Active: yes

Sequence Detail Data

Date: 02/01/00 Time: 10:00
 Customer Job: 20000201
 Customer Sequence: 006
 Order: so2077 Line: 1 UM: EA
 Item Number: 88-100 CASE_AUTO-UNIT
 PO Number:
 Customer Reference: 1R1234XYZ015
 Customer Dock: Picked: no
 Line Feed: X-Ref: no

Quantity: 1.0
 Customer Item:
 Customer Build Date: / /

Cum Quantity: 0.0

Status: Delete: no

F1=Help F2=Go ESC=End "Next/Prev" Ctrl-X/C/V=Cut-Copy-Paste

CSS-FE-160

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.



Course Overview

- ✓ Introduction to Customer Sequence Schedules
- ✓ Business Considerations
- ✓ Set up Customer Sequence Schedules
- ✓ Load Customer Sequence Schedules
- ✓ Plan Customer Sequence Schedules
- ✓ Ship Customer Sequence Schedules
- ✓ Customer Sequence Schedules Features and Options

CSS-FE-170

CSS Workshop



Sequence Schedule Next Day– Explorer Assembly Plant

Description: If you are not able to load the schedule via EDI, then just review the steps of this exercise and continue with the next exercise, *Sequence Schedule – Manual Entry on page 303*. Loading the schedule via EDI will automatically generate cross-reference records (for the blue sunroofs that re-appear in this schedule). Without EDI you would have to copy the schedule to a new release in Sequence Schedule Maintenance and answer Yes to the prompt asking to create x-reference, and then add the requirements of the new schedule.

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

Sequence Schedule – Loaded via EDI

- 1 To import the sequence schedule by entering:

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

Use Document Import 35.13

Note 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 To generate the Sequence Schedule Report enter the following:.

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

Use Sequence Schedule Report 7.5.4.7

- 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 Schedule – 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> (for example, 20010306)
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.

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Date	Time	Job	Seq.	Order	Line	Part	PO	Ref	Qty
Next Tuesday		<Julian Date> like 20010306	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
Wed		<Julian Date> like 20010307	001			part2		1R021	1
“		“	002			part3		1R022	1
“		“	003			part2		1R023	1
“		“	004			part4		1R024	1
“		“	005			part3		1R025	1
“		“	006			part4		1R026	1
“		“	007			part1		1R027	1
“		“	008			part4		1R028	1
“		“	009			part3		1R029	1
“		“	010			part1		1R030	1
“		“	011			part2		1R031	1
“		“	012			part1		1R032	1
Thurs		<Julian Date> like 20010308	001			part4		1R033	1
“		“	002			part3		1R034	1
“		“	003			part2		1R035	1
“		“	004			part2		1R036	1
“		“	005			part3		1R037	1
“		“	006			part4		1R038	1

Date	Time	Job	Seq.	Order	Line	Part	PO	Ref	Qty
“		“	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
Include 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
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	<Yesterday's date>
Schedule Date Type	Ship

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

Date	Time	Int	Reference	Quantity	Q	Cmt	Rqm Det
Next Monday		D		5	F	No	No
Tues		D		5	F	No	No
Wed		D		5	F	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	<Yesterday's date>
Schedule Date Type	Ship

7 Advance to the Schedule Detail Data frame and enter:

Date	Time	Int	Reference	Quantity	Q	Cmt	Rqm Det
Next Monday		D		5	F	No	No
Tues		D		5	F	No	No
Wed		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	<Yesterday's date>
Schedule Date Type	Ship

11 Advance to the Schedule Detail Data frame and enter:

Date	Time	Int	Reference	Quantity	Q	Cmt	Rqm Det
Next Monday		D		5	F	No	No
Tues		D		5	F	No	No
Wed		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	<Yesterday's date>
Schedule Date Type	Ship

15 Advance to the Schedule Detail Data frame and enter:

Date	Time	Int	Reference	Quantity	Q	Cmt	Rqm Det
Next Monday		D		5	F	No	No
Tues		D		5	F	No	No
Wed		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
Sequences 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

Use Customer Controls Maintenance 7.5.4.1

Sequence Schedule – Loaded 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
“		Job 83	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			part1		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 Sequence	25
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:

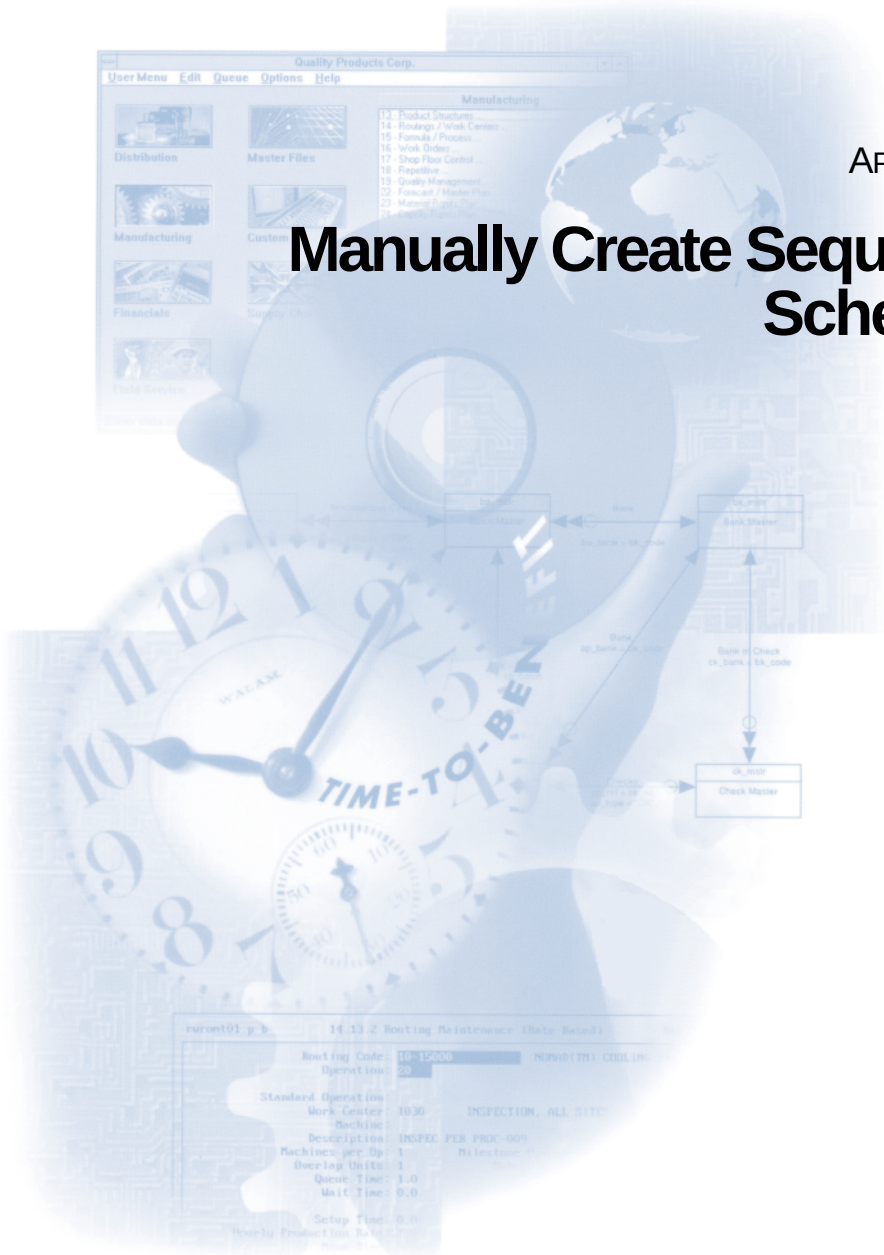
Field	Data
Ship-To	f002
To	f002
Auto Allocation	Yes
Update	No

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 Schedule



Manually Create Sequence Schedule – Explorer Assembly Plant

- 1 Create a sequence schedule by entering:

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

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 Monday>, for example, 20010305
Customer Sequence	001
Item Number	part1
Customer Ref	1R001
Quantity	1

- 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> like 20010305	002			part2		1R002	1
“		“	003			part1		1R003	1
“		“	004			part3		1R004	1
“		“	005			part4		1R005	1
“		“	006			part1		1R006	1
“		“	007			part4		1R007	1
“		“	008			part3		1R008	1
“		“	009			part4		1R009	1

Date	Time	Job	Seq.	Order	Line	Part	PO	Ref	Qty
“		“	010			part2		1R010	1
“		“	011			part3		1R011	1
“		“	012			part2		1R012	1
Tues		<Julian Date> like 20010305	001			part1		1R013	1
“		“	002			part2		1R014	1
“		“	003			part3		1R015	1
“		“	004			part1		1R016	1
“		“	005			part4		1R017	1
“		“	006			part2		1R018	1
“		“	007			part3		1R019	1
“		“	008			part4		1R020	1
Wed		<Julian Date> like 20010305	001			part2		1R021	1
“		“	002			part3		1R022	1
“		“	003			part2		1R023	1
“		“	004			part4		1R024	1
“		“	005			part3		1R025	1
“		“	006			part4		1R026	1
“		“	007			part1		1R027	1
“		“	008			part4		1R028	1
“		“	009			part3		1R029	1
“		“	010			part1		1R030	1
“		“	011			part2		1R031	1
“		“	012			part1		1R032	1

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

Print Sequence Schedule Report

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

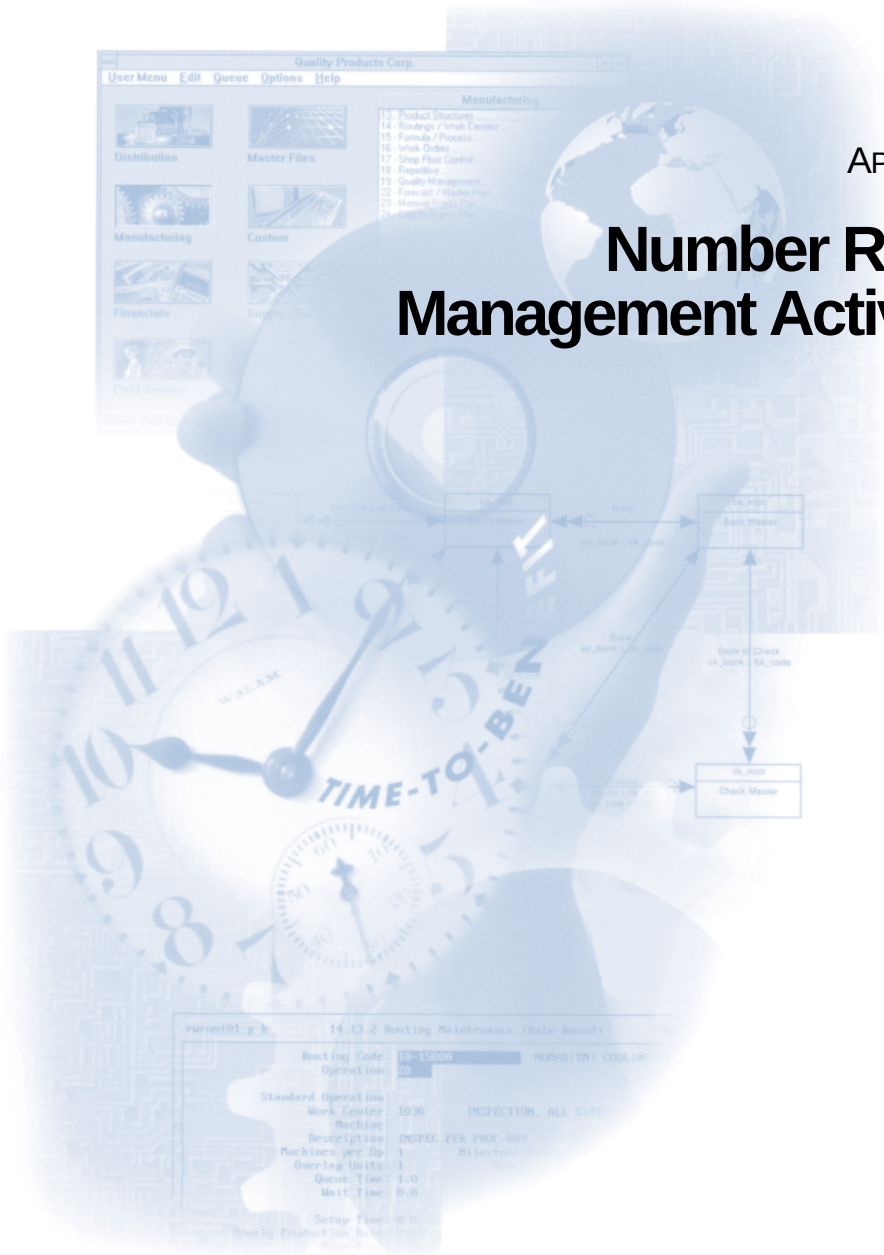
Field	Data
Ship-To	f001
To	f001
Sub-Totals	Yes

Use Sequence Schedule Report 7.5.4.7

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

APPENDIX C

Number Range Management Activities



Set Up Sequence Numbers

Description: Fjord has sequence number requirements for pre-shippers, shippers, and bill of lading documents. Sequence numbers are set up as compound data structures containing one or more segments.

- 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	preship
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
Minimum Value	0
Maximum Value	99999
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

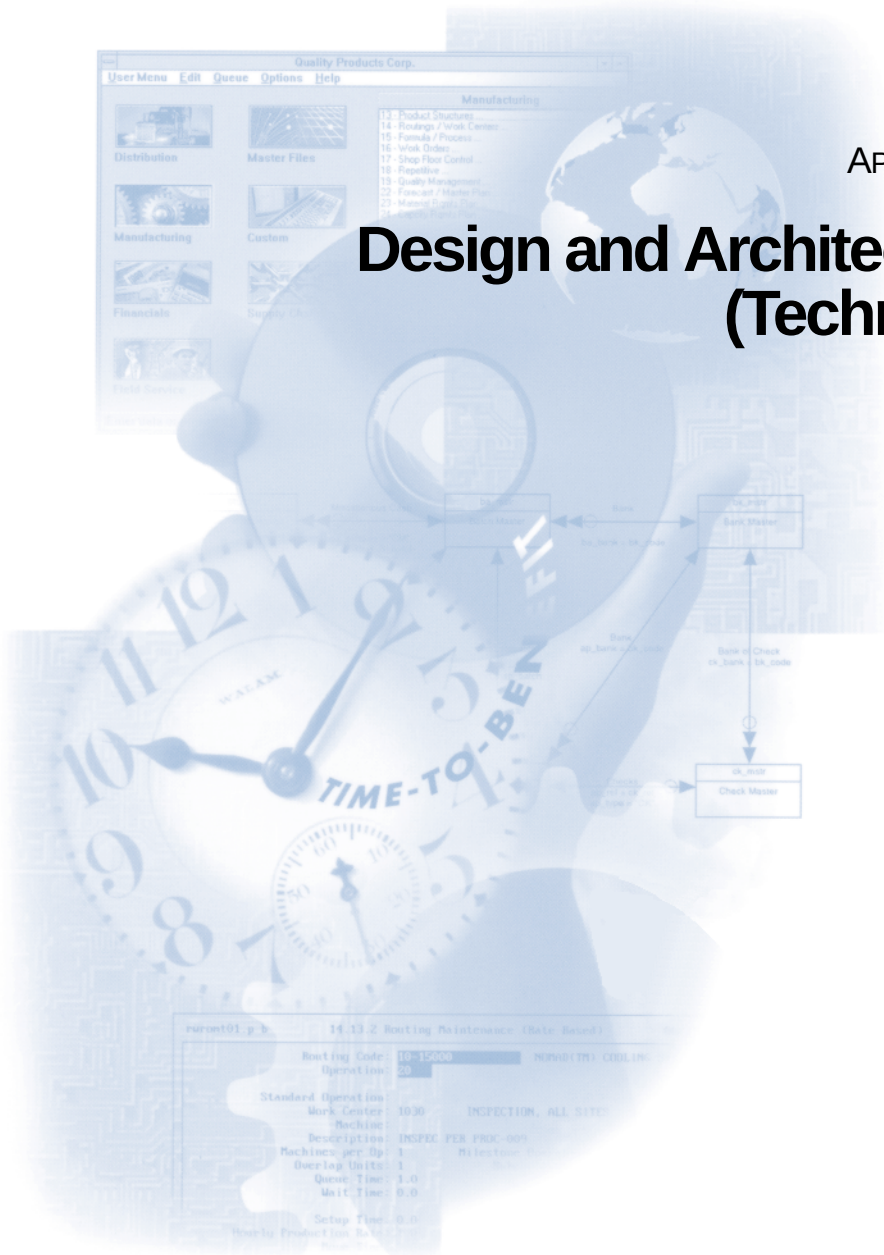
- 10** Update the Container/Shipper Control File to use the new sequence number codes.

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 (Technical)



Design and Architecture

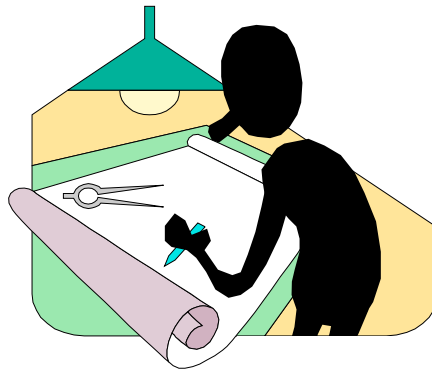
- ◆ Design Considerations
- ◆ Programming Considerations



CSS-DE-010

Design and Architecture

Design Considerations

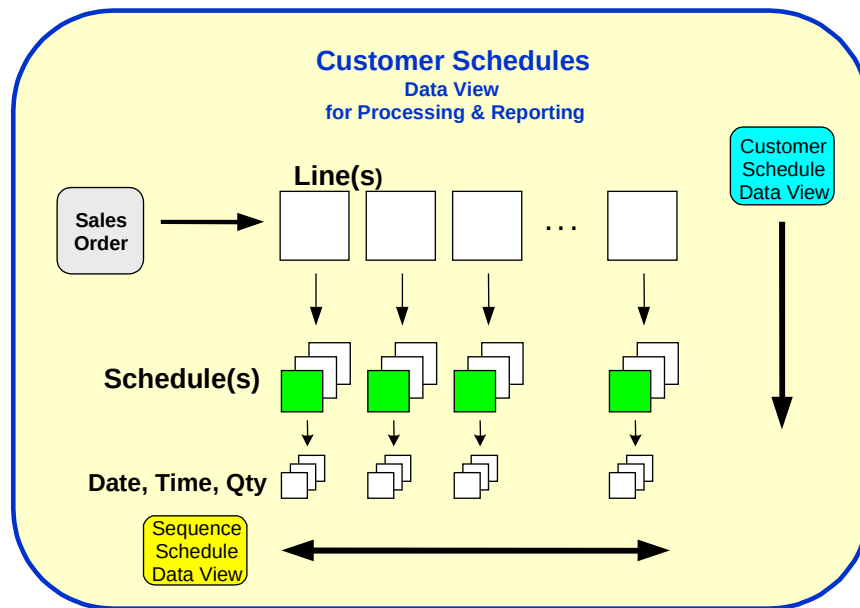


CSS-DE-020

Design Considerations

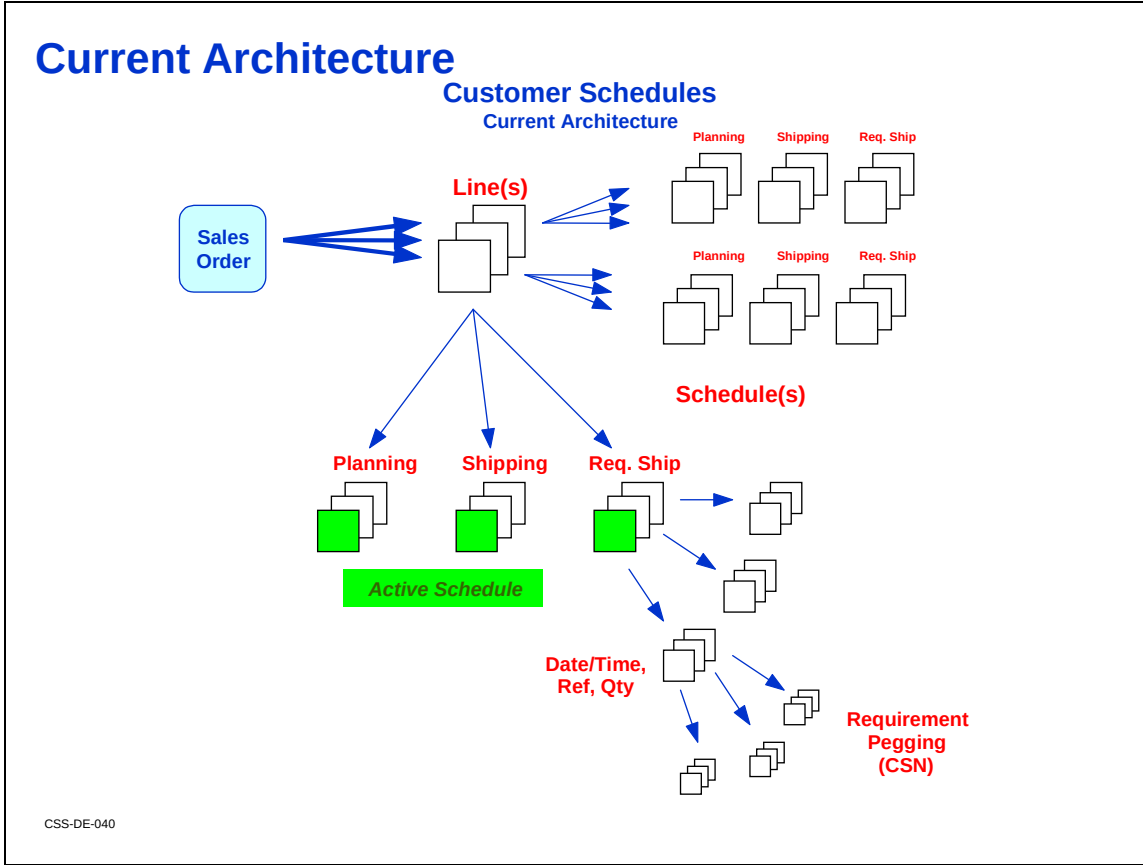
- Scheduled Order - Data View
- Current Architecture
- New Schedule Type
- Design Alternatives
- Design Requirements
- Selected Architecture
- E-R (Entity-Relationships) Diagram
- Schema Diagram

Scheduled Order - Data View



CSS-DE-030

Scheduled Order - Data View



Current Architecture

New Schedule Type

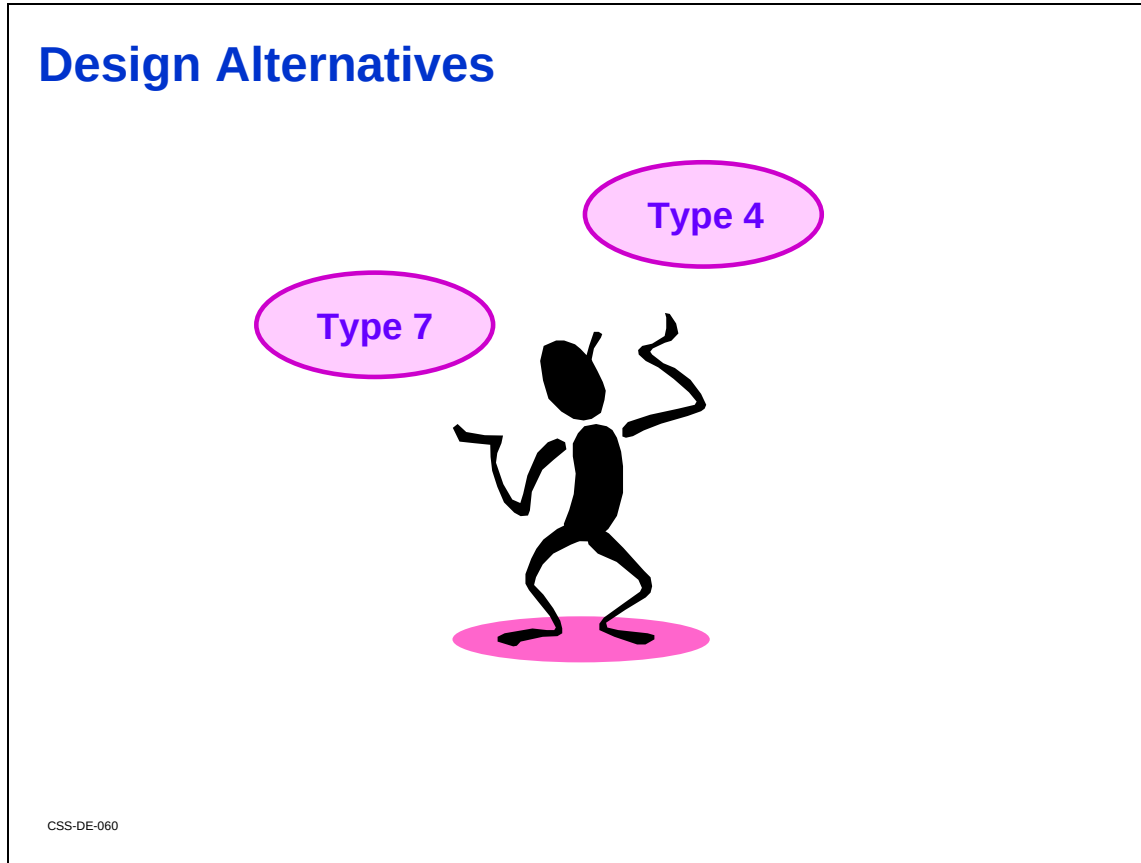


CSS-DE-050

New Schedule Type

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 Alternatives

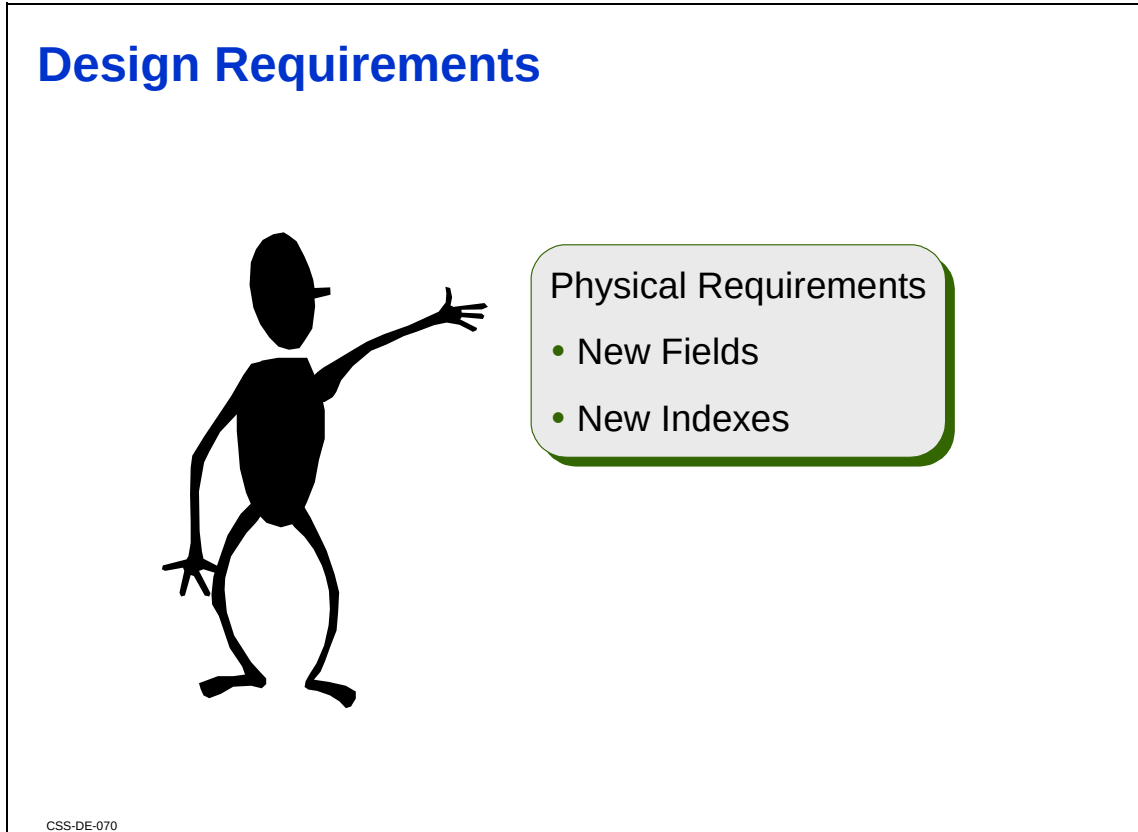
New Type 7

- Creates gap between schedule types

New Type 4

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

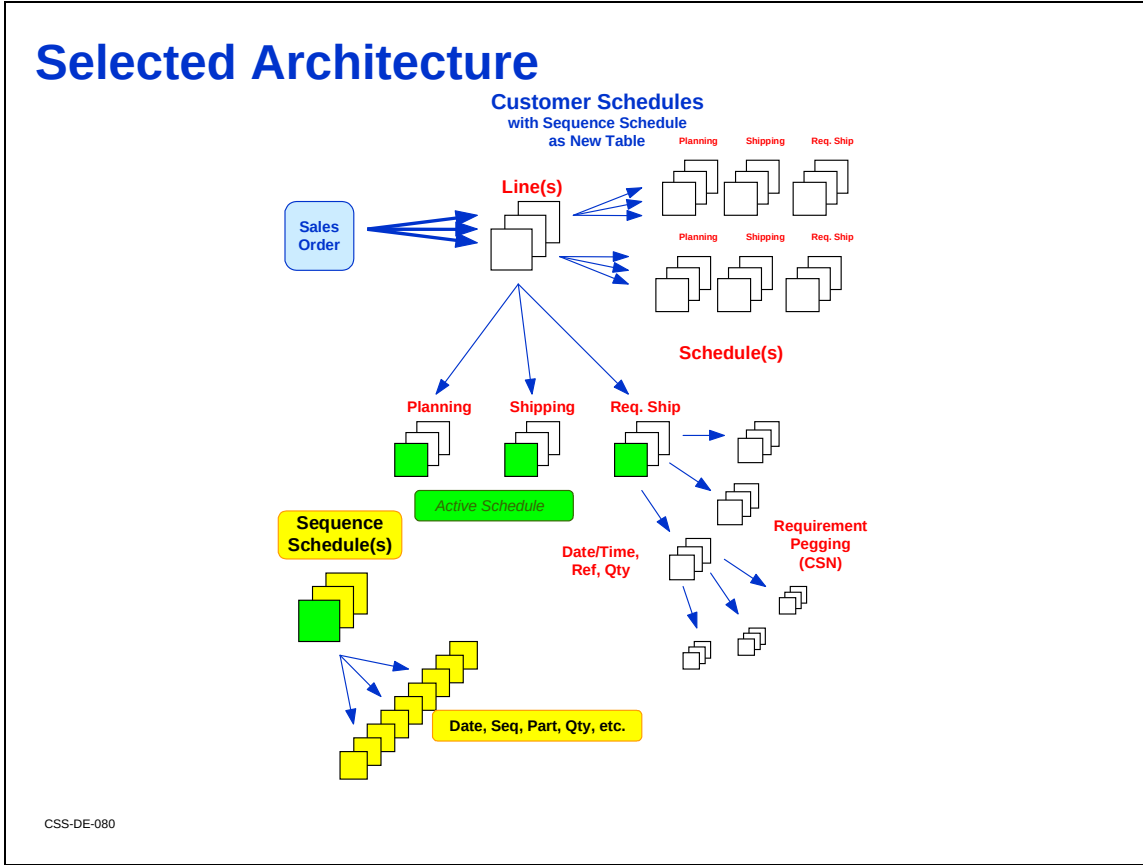
New Data Structure



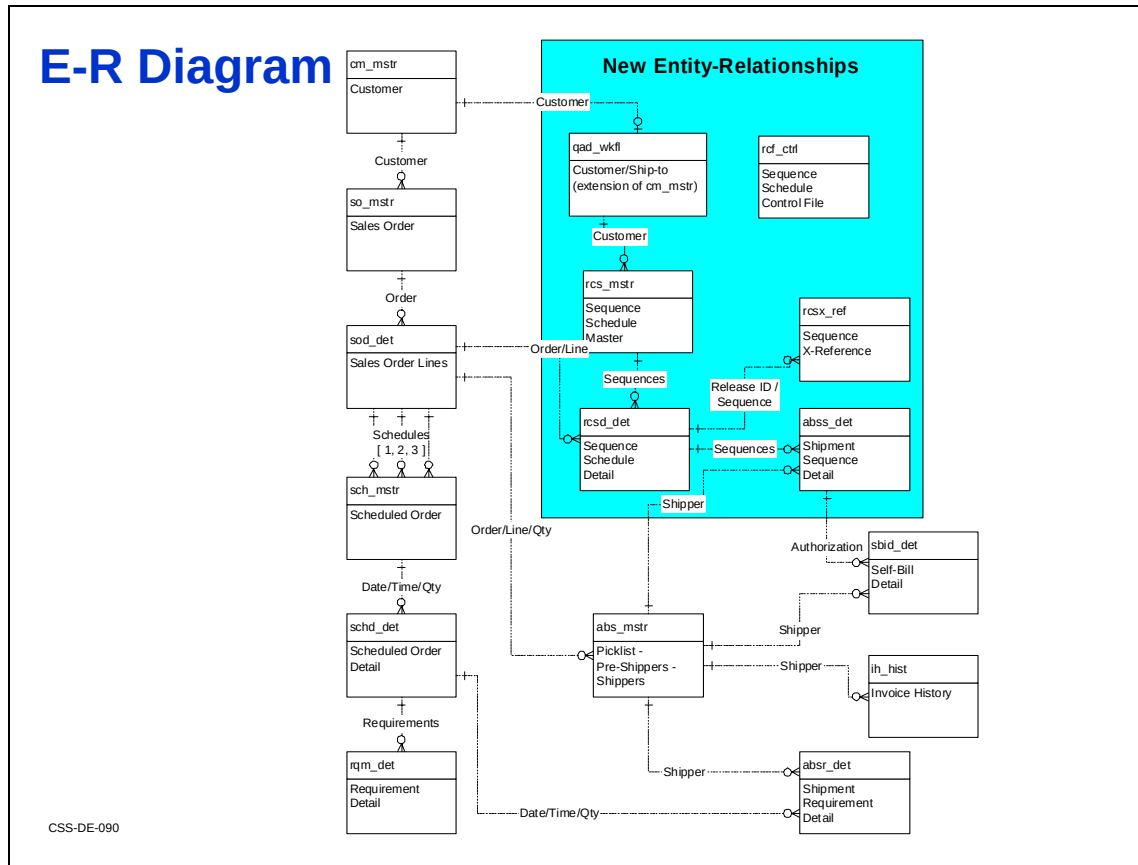
Design Requirements

Physical requirements:

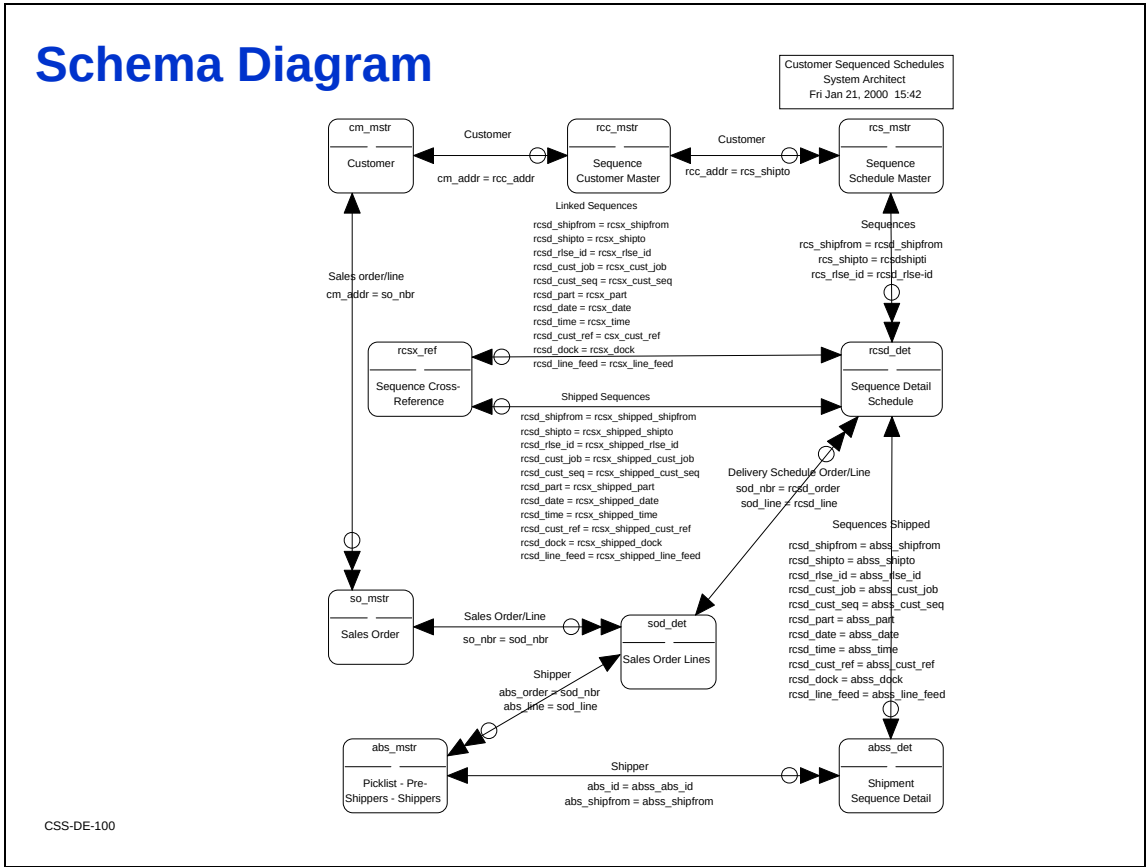
- New fields
 - Job
 - Sequence
 - Dock
 - Line Feed
- New indexes
 - By date/sequence for maintenance
 - By date/item for planning (required ship schedule [RSS])
 - By date/destination/sequence for shipping



Selected Architecture



E-R Diagram



Schema Diagram

Programming Considerations

- ✦ Required Ship Schedule Update
- ✦ Picklist/Pre-Shipper - Automatic
- ✦ ECommerce



CSS-DE-110

Programming Considerations

- Required Ship Schedule Update 7.5.5
- Picklist/Pre-Shipper - Automatic 7.9.1
- ECommerce

Required Ship Schedule Update



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

CSS-DE-120

Required Ship Schedule Update

Menu Number 7.5.5

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

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



CSS-DE-130

Picklist/Pre-Shipper - Automatic

Menu Number 7.9.1

Handles sequenced and non-sequenced items:

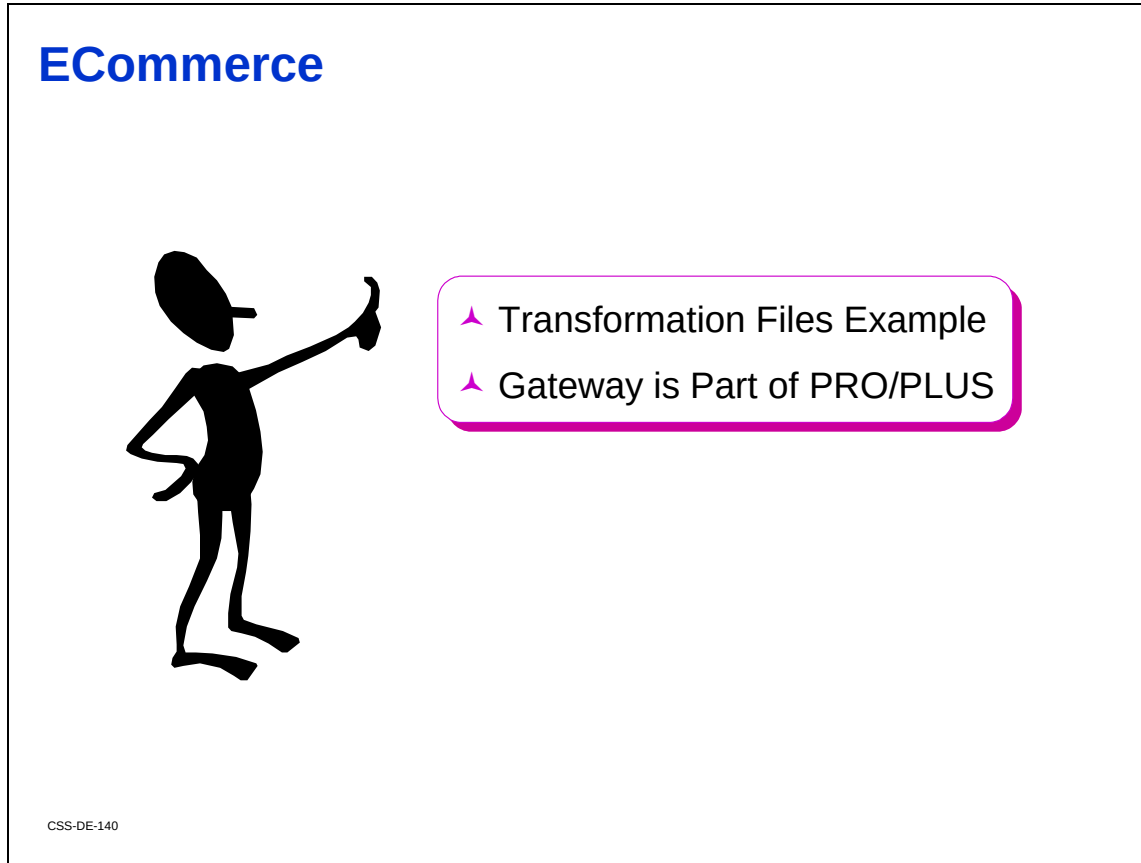
- One transaction to create pre-shippers
- Segregates sequenced and non-sequenced items into separate pre-shippers by Ship-To
- Eliminates cloning of code
- Needs selection criteria for sequences

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

Transformation files example:

- Exchange file document definition
- MFG/PRO document definition
- Implementation document definition
- Transformation definition

Gateway is part of PRO/PLUS

- Will be part of ECommerce module when CSS is in standard product

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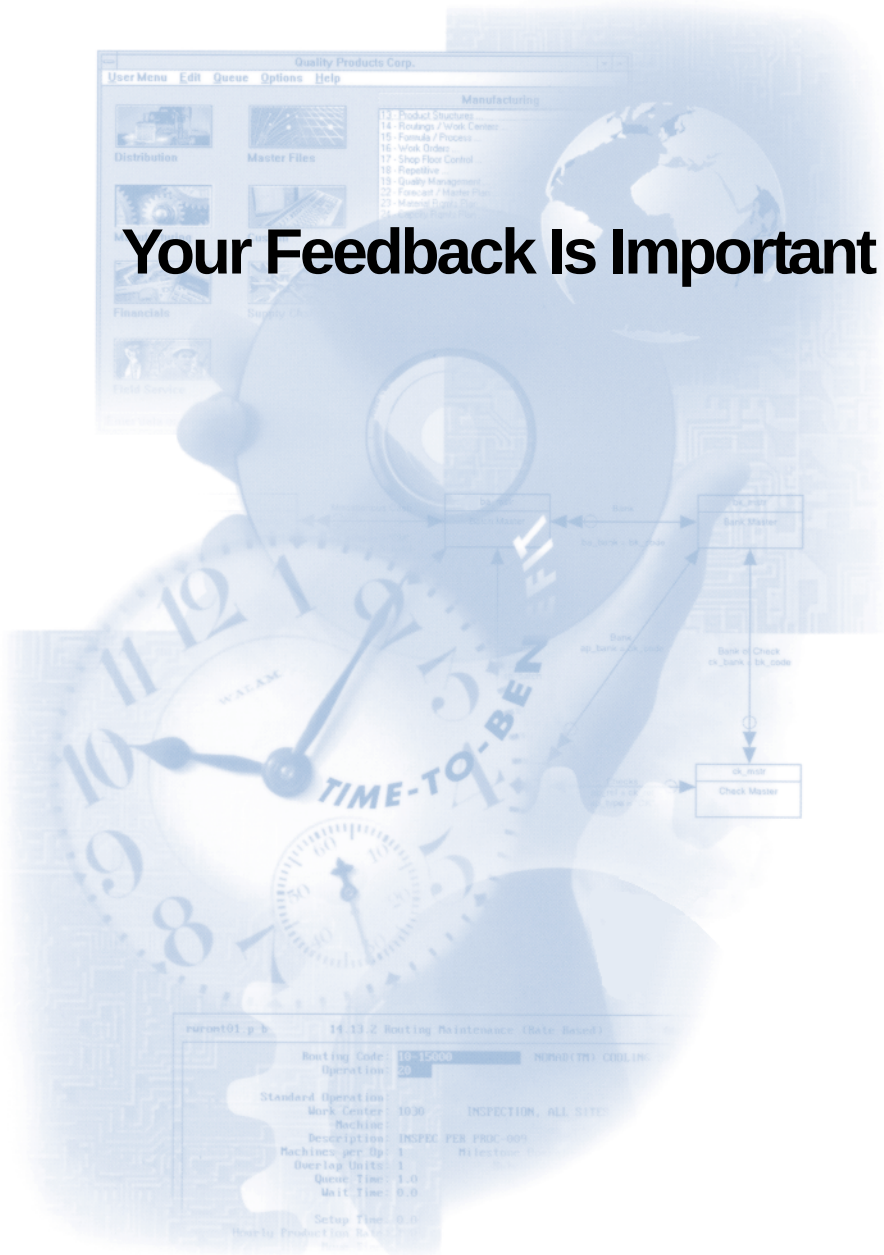
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