



QAD Enterprise Applications  
Enterprise Edition

# Training Guide QAD Customer Sequence Schedules

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# QAD Customer Sequence Schedules Change Summary

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

<b>Date/Version</b>	<b>Description</b>	<b>Reference</b>
April 2016/v2016 EE	Rebranded for QAD 2016 EE, added link to Preface	--
April 2015/v2015 EE	Rebranded for QAD 2015 EE	--
March 2014/v2014 EE	Rebranded for QAD 2014 EE	--
Sept 2013/v2013.1 EE	Rebranded for QAD 2013.1 EE	--
March 2013/v2013EE	Rebranded for QAD 2013 EE	--
Sept 2012/v2012.1 EE	Rebranded for QAD 2012.1 EE; Consistency edit	--
March 2012/v2012 EE	Rebranded for QAD 2012 EE	--
Sept 2011/v2011.1 EE	Rebranded for QAD 2011.1 EE	--



# About This Course

## Course Description

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

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

## Course Objectives

By the end of this class, students will:

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

## Audience

- Implementation consultants
- Members of implementation teams
- Key users

## Prerequisites

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

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

## Course Credit and Scheduling

This course is designed to be taught in a day.

### Virtual Environment Information

The hands-on exercises in this book should be used with the latest Enterprise Edition learning environment in the 10USA > 10USACO workspace. When prompted to log in, specify *demo* for user ID and *qad* for password.

### Additional Resources

If you encounter questions on QAD software that are not addressed in this book, several resources are available. The QAD corporate Web site provides product and company overviews. From the main site, you can access the QAD Learning or Support site and the QAD Document Library. Access to some portions of these sites depends on having a registered account.

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

#### QAD Learning Center

To view available training courses, locations, and materials, use the QAD Learning Center. Choose Education under the Services tab to access this resource. In the Learning Center, you can reserve a learning environment if you want to perform self-study and follow a training guide on your own.

#### QAD Document Library

To access release notes, user guides, training guides, and installation and conversion guides by product and release, visit the QAD Document Library. Choose Document Library under the Support tab. In the QAD Document Library, you can view HTML pages online, print specific pages, or download a PDF of an entire book.

For more information, see *QAD Scheduled Order Management User Guide*.

To find a resource, you can use the navigation tree on the left or use a powerful cross-document search, which finds all documents with your search terms and lets you refine the search by book type, product suite or module, and date published.

#### QAD Support

Support also offers an array of tools depending on your company's maintenance agreement with QAD. These include the Knowledgebase and QAD Forums, where you can post questions and search for topics of interest. To access these, choose Visit Online Support Center under the Support tab.

Chapter 1

# Introduction to QCS

## Introduction to Customer Sequence Schedules

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

## What Sequence Schedules Do

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

## Customer Sequence Schedules

### Sequence Schedule Documents and Variances

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



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

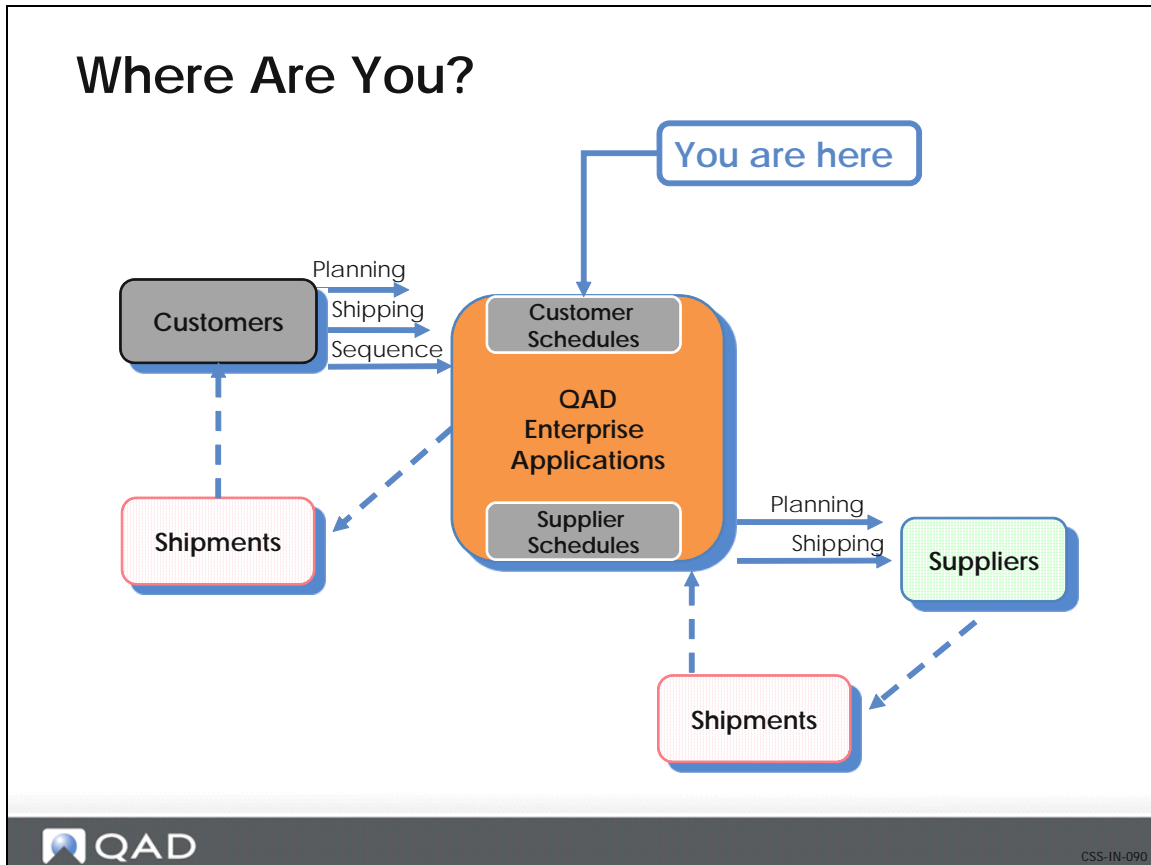
- Allows you to receive and process shorter term, detailed customer sequence schedules
- Sent by an Electronic Data Interchange (EDI) or EDI eCommerce
  - Document type 866

### What Customer Sequence Schedules Do

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

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

## Where Are You?



Receive incoming customer sequence schedules using EDI eCommerce.

Selectively include sequence requirement information on:

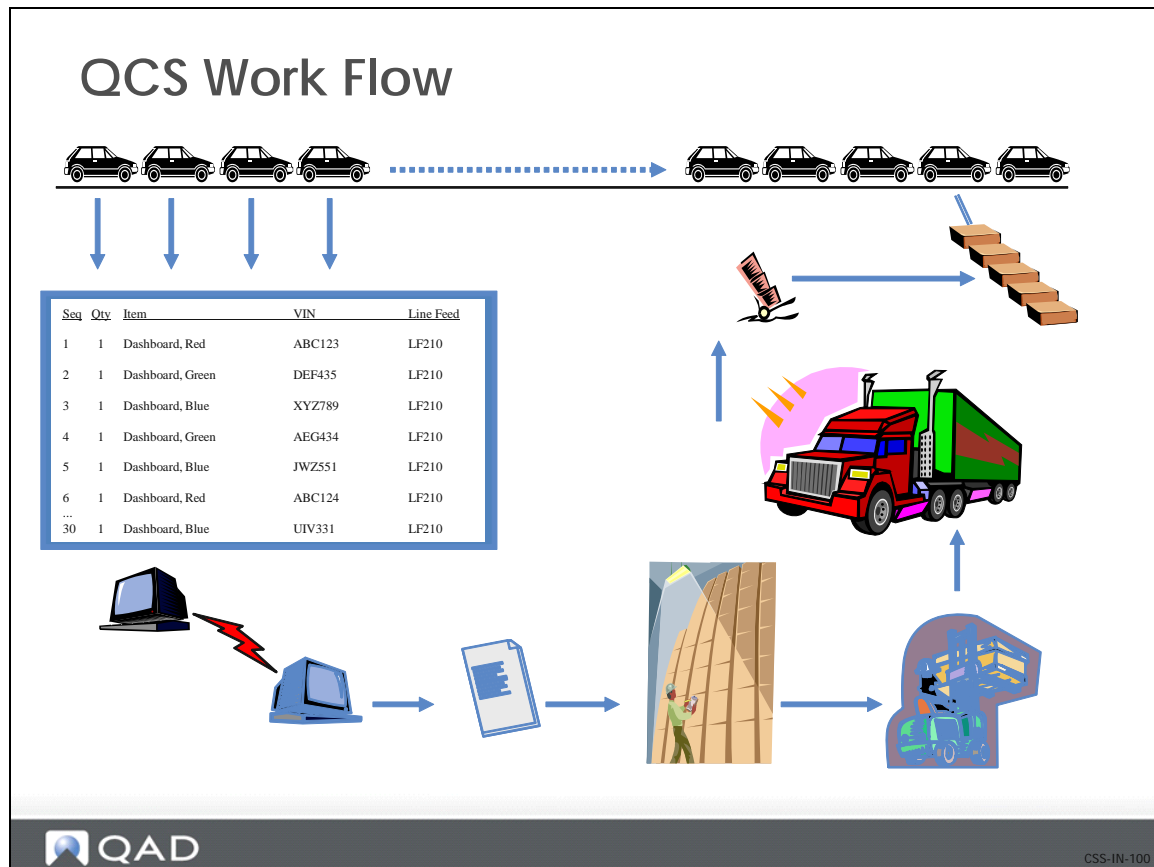
- Picklist/Pre-Shipper
- Shipper
- Invoice
- Advanced Ship Notice (ASN)
- Required Ship Schedule (RSS)

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

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

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

## QCS Workflow



Some customers need a particular delivery sequence in order to facilitate the consumption of the parts by their own assembly process. Standard customer schedules did not meet this requirement

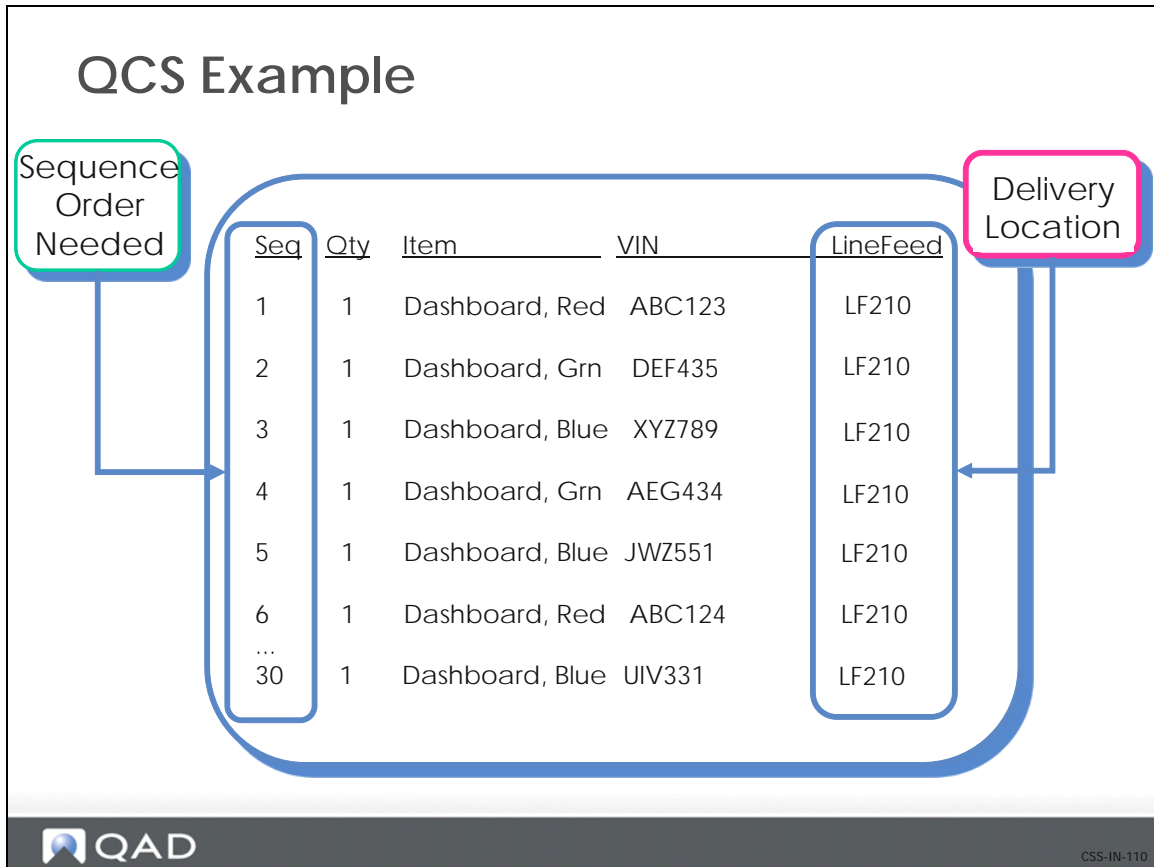
This type of shipping is becoming increasingly popular with customers requiring larger subassemblies that are similar, but differ in color, size, or other optional features such as Sun Roof, Dashboards and Seats. Many companies that operate in just-in-time (JIT) environments regularly provide detailed 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, the supplier would provide subassemblies that are similar, but different in color, size, or other optional features (such as 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 (sequence) in which they are required, are sent to the supplier in a production sequence schedule or 866 document.

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

## QCS Example



## Terminology

### Terminology

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



CSS-IN-120

*Customer Dock.* Identifies dock location within the customer's site for material to be delivered

*Customer Job.* Customer supplied Id that identifies customer's production process. It can contain alphanumeric values, such as a date (02/07/2012)

*Customer Reference.* Identifies the customer's end item

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

*Customer Sequence.* Customer supplied ID that identifies order of assemblies in their production process. It can contain alphanumeric values; for example, A001, A002, B001

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

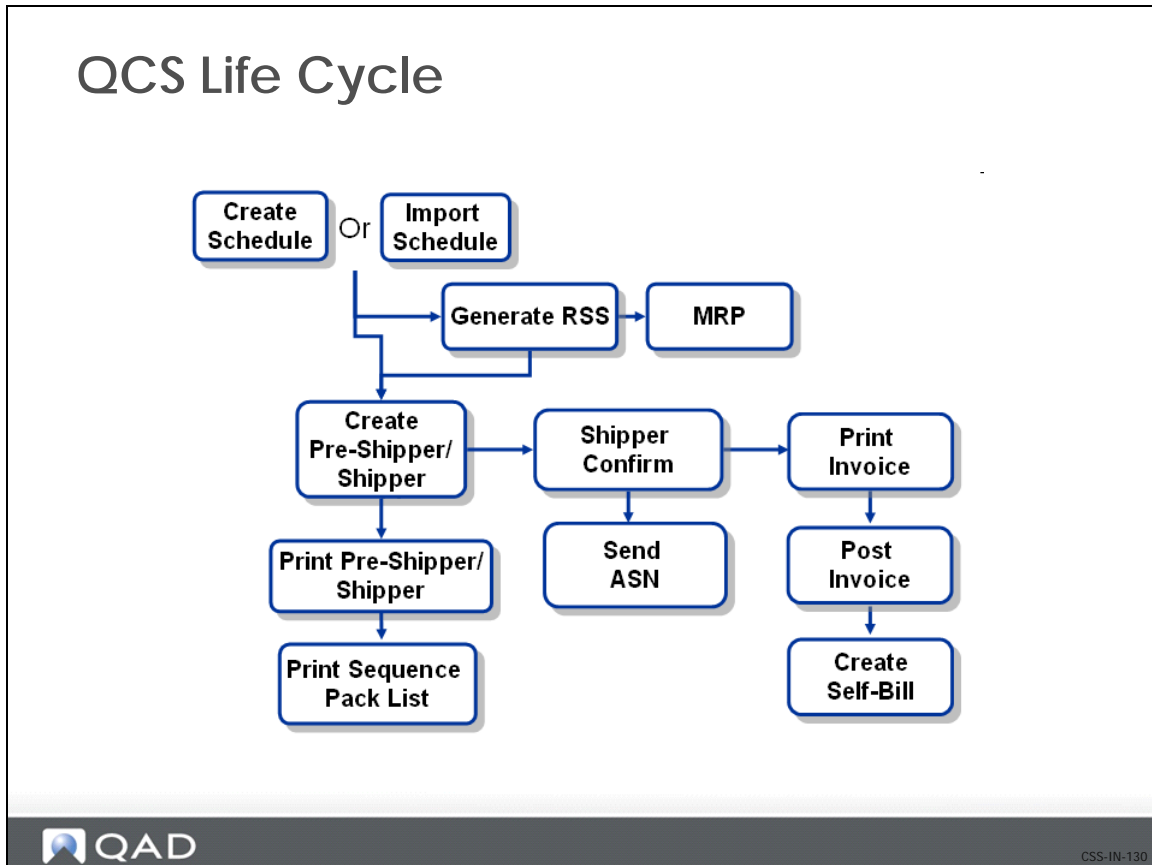
*Packing Order.* Indicates how the material is to be packed according to the customer's preference. There are two types:

- Forward

Reverse (first on top)

*Sequence Pack List.* New document that accompanies pre-shipper (total quantity). It displays items in sequence and facilitates material handling, staging, and shipping

## QCS Life Cycle



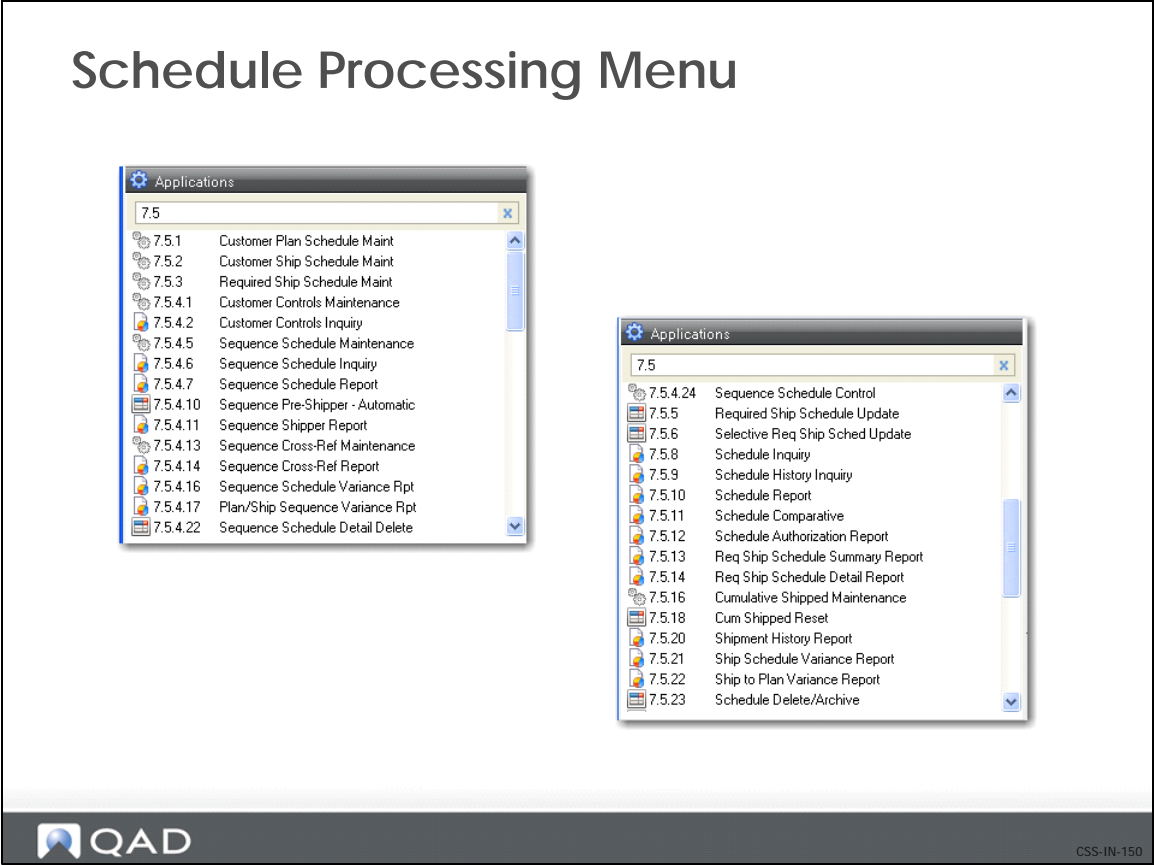
## Processing QCS



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

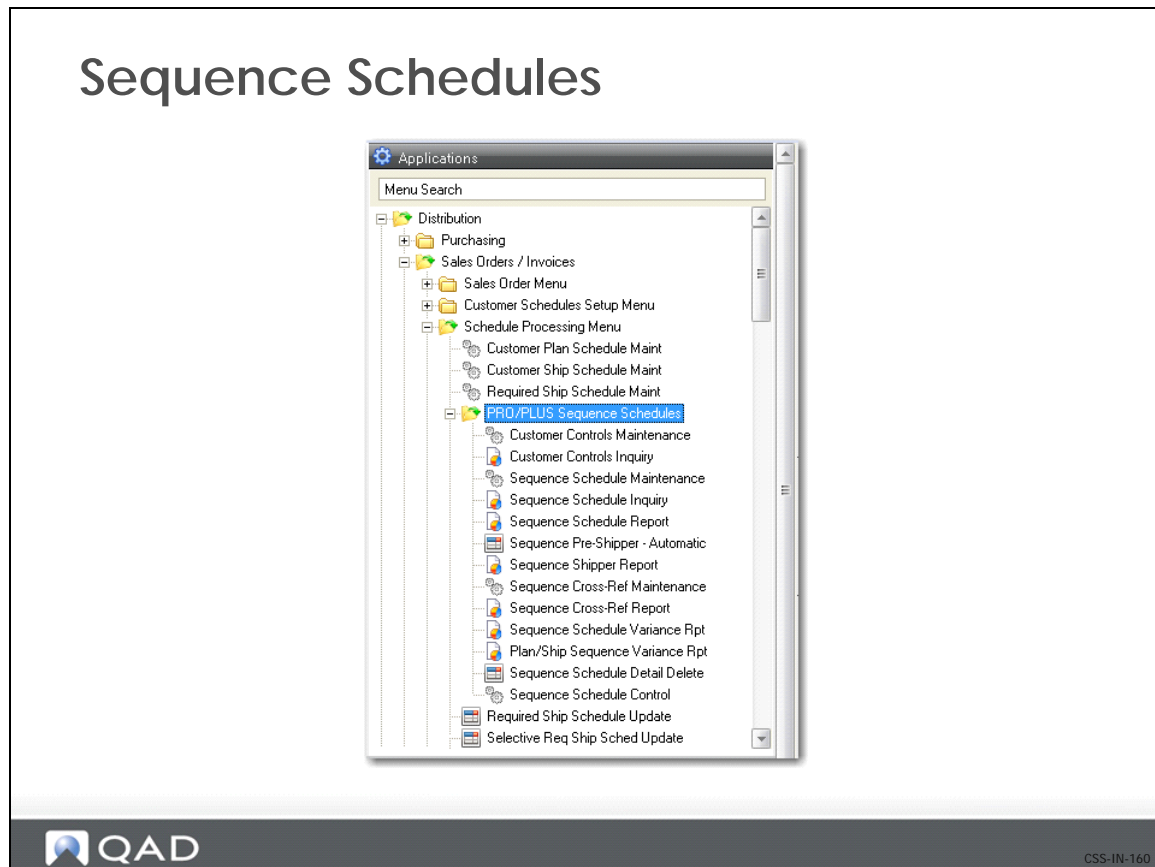
- 1 Create a sequence scheduled order for a customer.
- 2 Import the sequence schedule release from the customer.
  - Long term planning schedule outlining the customer's requirements (dates, quantities)
  - Short term shipping schedule outlining what to ship day-to-day (optional)
- 3 Create the RSS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

### Schedule Processing Menu (7.5)



Access to the QCS functions.

## Sequence Schedules



Use the Sequence Schedules menu to access the QCS functions.

### Review Questions:

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

Chapter 2

# **Business Considerations**

## Business Considerations

In this section you learn how to:

- Identify key business considerations before setting up QCS in QAD Enterprise Applications
- Set up QCS in QAD Enterprise Applications
- Loading QCS in QAD Enterprise Applications
- Planning QCS in QAD Enterprise Applications
- Shipping QCS in QAD Enterprise Applications
- QCS Features and Options



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## Business Considerations

- EDI/EDI eCommerce
- Netting Logic



CSS-BU-020

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

## EDI eCommerce

### EDI eCommerce

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



CSS-BU-021

## EDI Business Value and Features

### EDI Business Value and Features

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



CSS-BU-022

## Netting Logic

### Netting Logic

#### Definition

- Netting logic determines how Required Ship Schedule Update (7.5.5) calculates a new release of the RSS. It uses netting logic to interpret quantities from the planning, shipping, and sequence schedules to arrive at the correct input for MRP (Material Requirements Planning).
- Why Consider
  - Customer sends sequence, planning, and shipping schedules
    - Need to tell system how to handle the schedules when calculating the RSS
- Functionality in QAD Enterprise Applications
- 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.



CSS-BU-023

## Scheduled and Sequence Scheduled Order Precedence

### Scheduled and Sequence Scheduled Order Precedence

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



CSS-BU-024

For scheduled orders without sequence schedules:

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

**Note** Discussed in *Training Guide: Customer Schedules*.

### Sequence Scheduled Orders

For scheduled orders with sequence schedules:

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

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

### Setup Implications

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

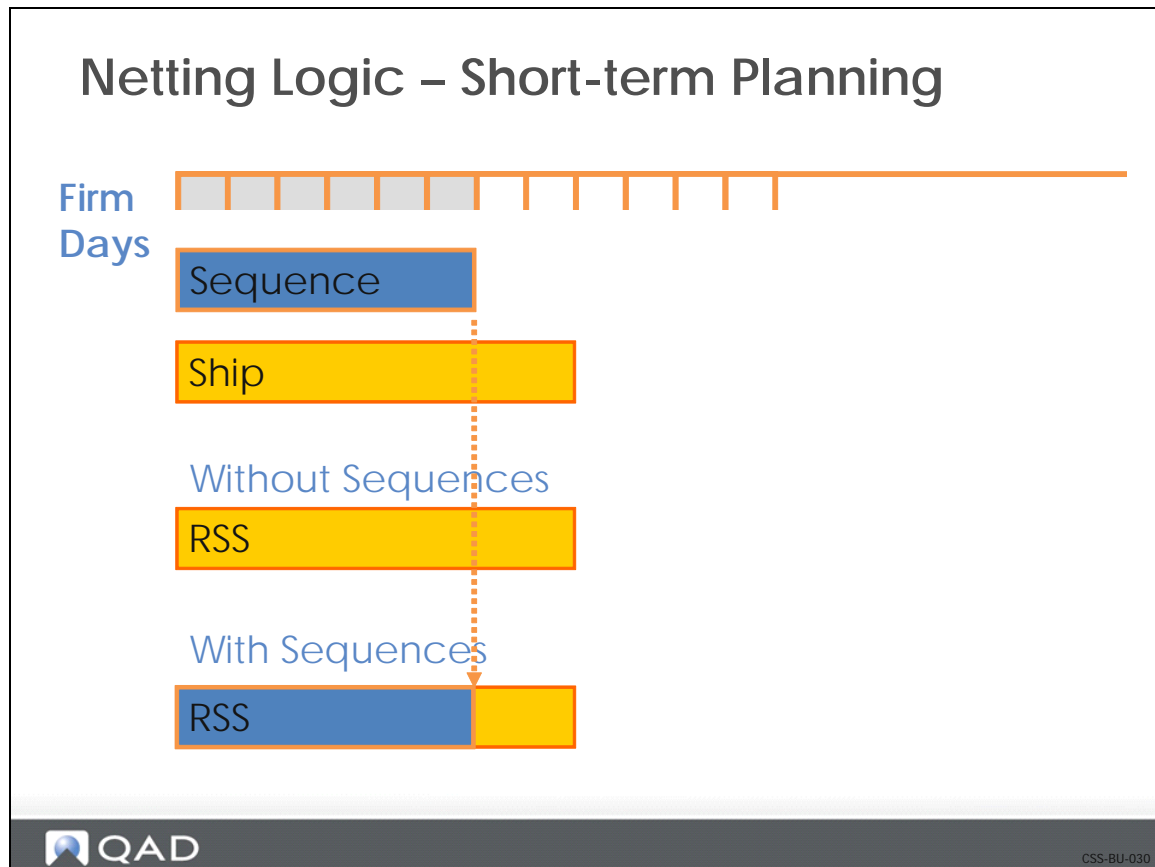
**Note** See “Sequence Scheduled Order” on page 67 for details.

Sequenced Scheduled Orders

## Sequenced Scheduled Orders

<b>Short Term Netting</b>	Sequence Schedules	Shipping Schedules	Planning schedules
Scheduled Orders		1	
Sequences	1	2	
<b>Long Term Netting</b>			
Scheduled Orders			1
Sequences	1		2
<b>Replace Logic</b>			
Scheduled Orders		1	2
Sequences	1	2	3
<b>Consume Logic</b>			
Scheduled Orders		2	1
Sequences	1	3	2

## Short Term Planning



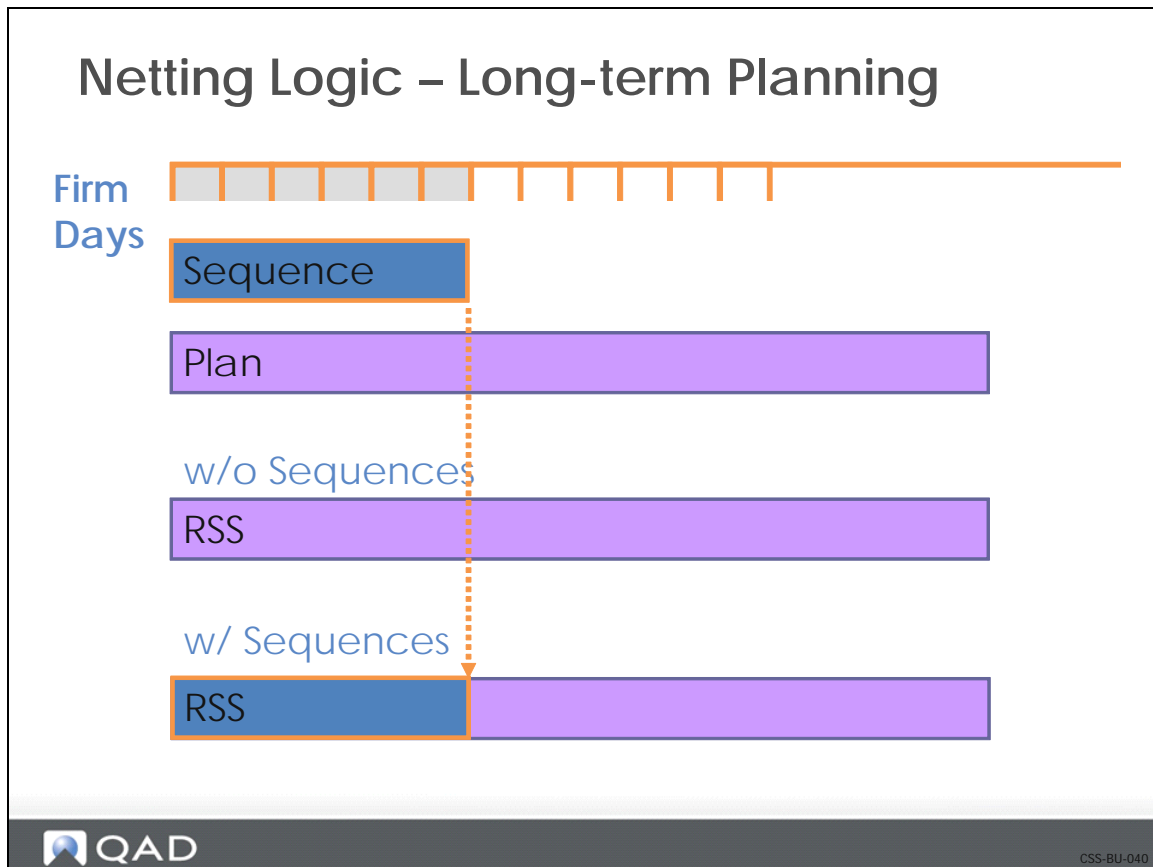
System uses the sequence and the shipping schedule to calculate the RSS.

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

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

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

## Long-term Planning



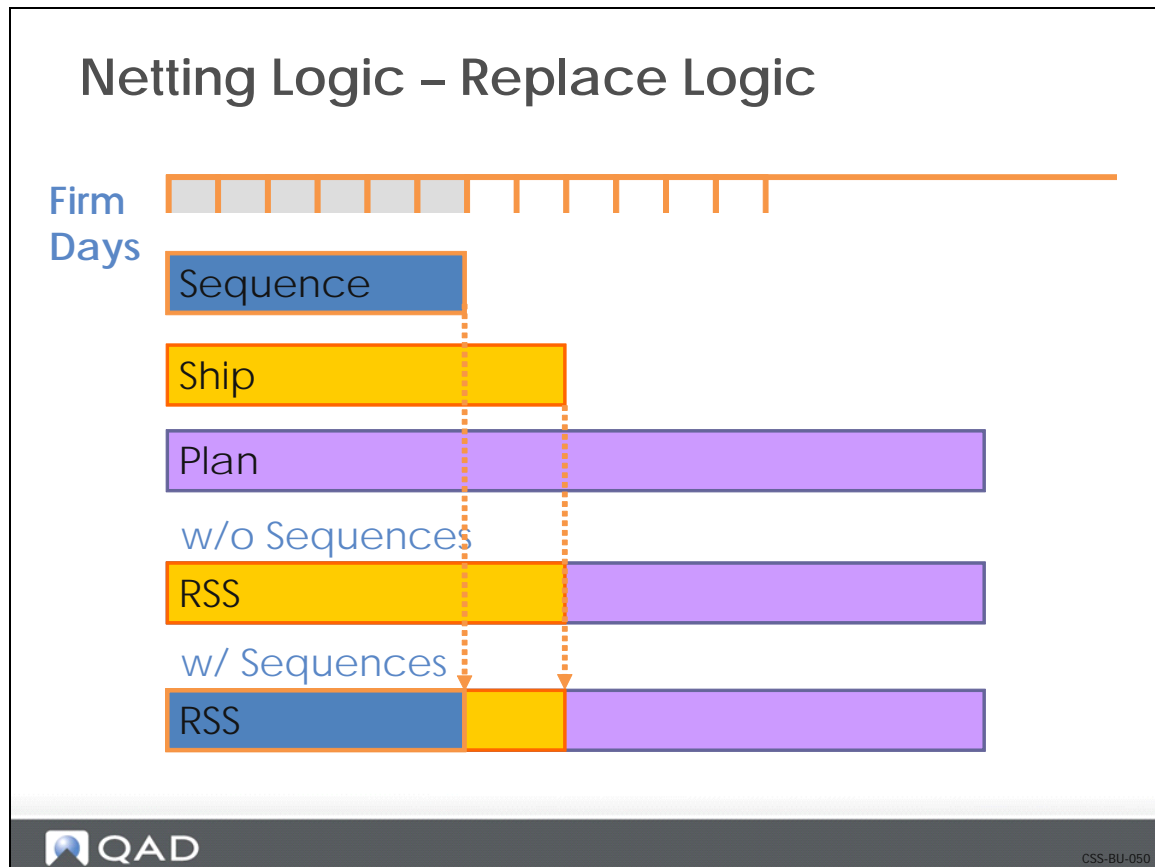
The system uses the sequence and planning schedule to calculate the RSS.

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

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

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

## Replace Logic



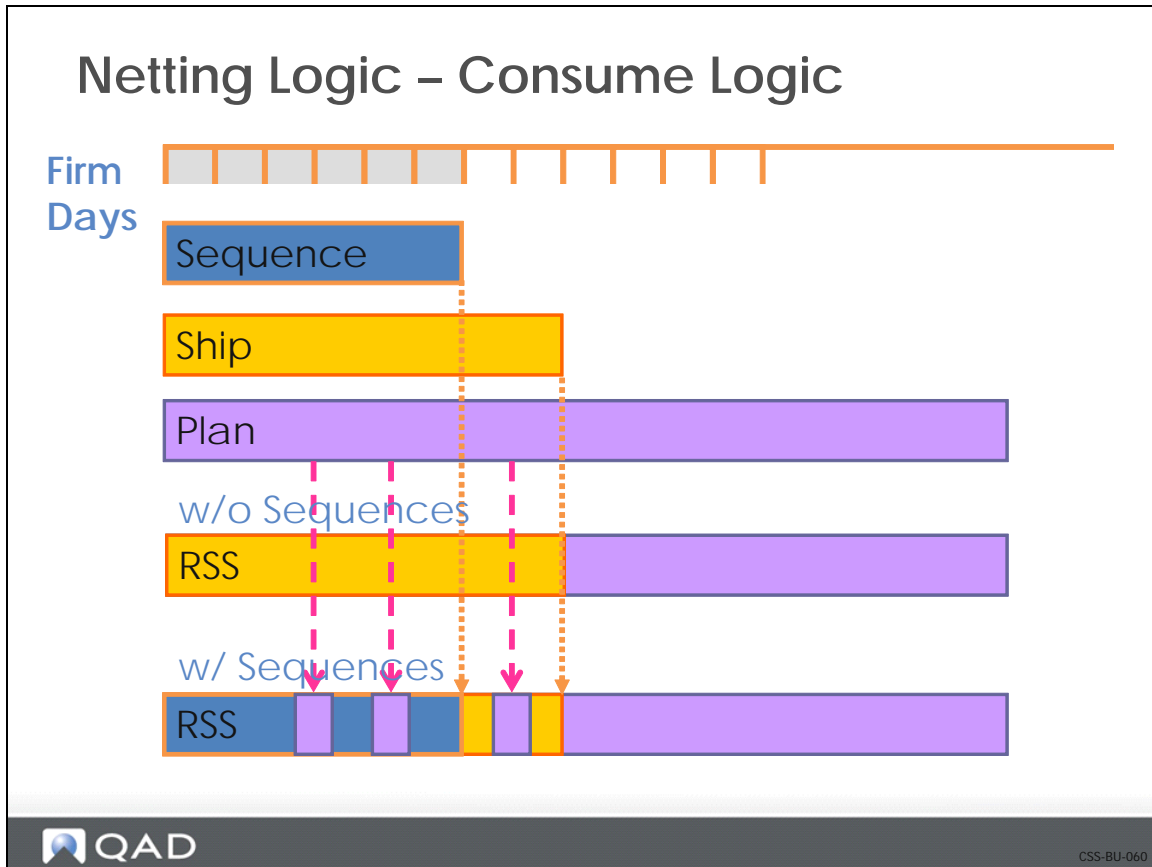
System combines the sequence, planning, and shipping schedules. Calculation starts with the specified sequence schedule days, followed by the shipping schedule, then the planning schedule.

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

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

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

## Consume Logic



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

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

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

### Review Questions

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



Chapter 3

# **Customer Sequence Schedules Setup**

## QCS Setup



- Item Records \*
- Customer Records \*
- Customer Calendars
- QCS Control Programs
- Status Codes
- EDI eCommerce \*
- Sequence Scheduled Order

\* Optional

## QCS Setup

### Setting Up QCS Involves the Following

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




CSS-SU-030

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


## Item Records

### QCS Setup



- Item Records \*
- Customer Records \*
- Customer Calendars
- QCS Control Programs
- Status Codes
- EDI eCommerce \*
- Sequence Scheduled Order

\* Optional

 QAD CSS-SU-040

Before creating a sequence scheduled order, item records must exist for all items and products stored in inventory that you will be shipping. The Item Master table 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)

## QCS Exercises

You have just been awarded a huge contract with Namaka Motor Company. You are the sole supplier to two Namaka plants, supplying five styles of sunroof from your finished goods inventory. Namaka is a JIT automotive assembler who does not want to have a huge investment of your parts in inventory so they require you to deliver sunroofs at the time they are needed and in the order of their assembly line process. Namaka will be sending you a 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 Namaka account.

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

### Exercise: Add Item Record

Create first new item record for the new Namaka contract.

Use Item Master Maintenance (1.4.1).

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

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

- 2 Advance to the Item Data frame and enter:

Field	Data
Prod Line:	10
Promo Group:	IND
Status:	ACTIVE

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

Field	Data
Site:	10-200
Location:	100

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

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

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

Field	Data
Pur/Mfg:	M
Mfg LT:	1

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

Field	Data
Price:	100.00

### Exercise: Create Remaining Item Numbers

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

Use Item Master Copy (1.4.12).

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

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

- 2 Create the third item record by entering:

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

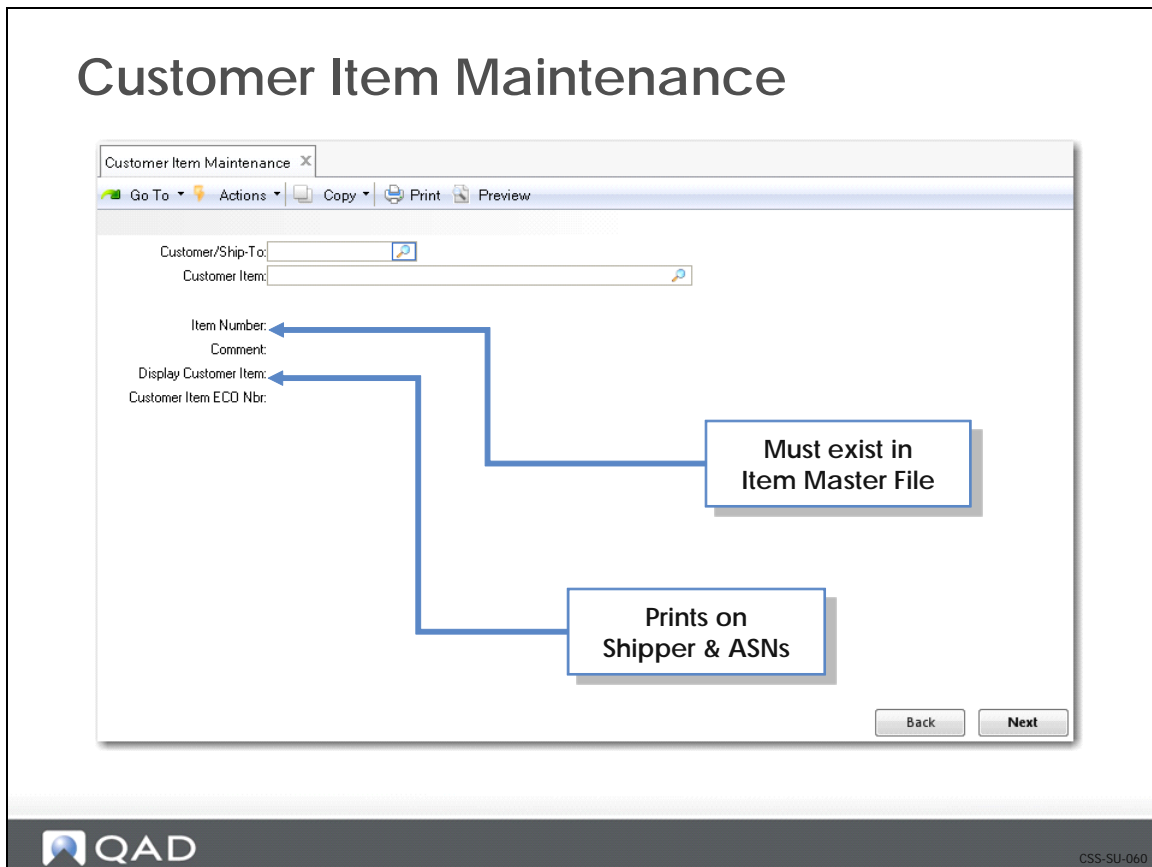
- 3 Create the fourth item record by entering:

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

- 4 Create the fifth item record by entering:

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

## Customer Item Maintenance (1.16)



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

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

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

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

### Exercise: Create Customer Items for Each Part

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

Use Customer Item Maintenance (1.16).

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

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

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

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

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

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

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

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

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

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

### Exercise: Add Inventory

Each part needs to be added to inventory.

Use Receipts - Unplanned (3.9).

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

Field	Data
Item Number:	part1
Quantity:	1000

Field	Data
Site:	10-200
Location:	100

- 2 Add inventory for the second part by entering:

Field	Data
Item Number:	part2
Quantity:	1000
Site:	10-200
Location:	100

- 3 Add inventory for the third part by entering:

Field	Data
Item Number:	part3
Quantity:	1000
Site:	10-200
Location:	100

- 4 Add inventory for the fourth part by entering:


Field	Data
Item Number:	part4
Quantity:	1000
Site:	10-200
Location:	100

- 5 Add inventory for the fifth part by entering:

Field	Data
Item Number:	part5
Quantity:	1000
Site:	10-200
Location:	100


## Customer Records

### QCS Setup



- Item Records \*
- **Customer Records \***
- Customer Calendars
- QCS Control Programs
- Status Codes
- EDI eCommerce \*
- Sequence Scheduled Order

• \* Optional

 QAD CSS-SU-080

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

## Customer Maintenance (2.1.1)

# Customer Create

The screenshot shows the 'Customer Create' form in a web browser. The form has a title bar 'Customer Create' and a menu bar with 'Go To', 'Actions', 'Tools', 'Attach', 'Print', and 'Preview'. Below the menu bar is an 'Attachments' section. The main form area contains the following fields and sections:

- Customer Code:** A text input field.
- Business Relation:** A dropdown menu.
- Active:** A checked checkbox.
- Bill-To Customer:** A dropdown menu.
- Business Relation:** A tabbed section with tabs for 'Business Relation', 'Accounting', 'Payment', 'Banking', 'Defaults', 'Credit Limit', 'Tax Info', and 'Comments'. The 'Business Relation' tab is selected.
- Name:** A text input field.
- Address:** Two text input fields.
- Zip/City:** Two text input fields.
- Country Code:** A dropdown menu with a search icon.
- State:** A dropdown menu.
- County:** A dropdown menu.
- Telephone:** A text input field.
- Fax:** A text input field.
- E-Mail:** A text input field.
- Internet:** A text input field.

At the bottom right of the form are three buttons: 'Save and Create', 'Save', and 'Close'.

*Customer Create (27.20.1.1)*

**QAD** CSS-SU-090

Use Customer Create (27.10.1.1) to set up and maintain customer records. Customer records contain information about the customer such as:

- Address (from the associated Business Relation)
- Bill-To Address
- Payment Information
- Defaults
- Credit Data
- Bank Information
- Tax Information
- Comments

## Customer Data Maintenance (2.1.1)

# Customer Data Maintenance

Customer Data Maintenance

Customer: 30C1002      Customer: 30C1002      Salespsn1: 30SP01

Customer Address

Customer: 30C1002      Business Relation: 30-C1002

Name: Namaka Motor Company      Active:

Address: 24 Naycn      Added: 2/8/2010

Address:

Address:

City: Shanghai      State:      Post: 200000      Format: Before

Country: CHINA      CN      County:

Attention: Ireme Kim      [2]

Telephone:      [2]

Fax:      [2]

Customer Data

Sort Name: Namaka Motor Company      Type: ENDU

Salespsn1: 30SP01      Multiple:       Region: AP

Ship Via: FEDX      Currency: CNY

Resale:      Site: 10-200

Remarks:      Lang: us

Back      Next

- Must be completed before you can use new customer record defined in Customer Create.
- Provides additional operational values, such as:
  - Site
  - Shipping information

## Ship-To Address

### Customer Ship-to Create

Select customer,  
 enter Ship-To Code.  
 Click Create to display  
 Address Info frame.

CSS-SU-140

- Sold-to customer receives order by default, unless you assign a different ship-to
- Can set up alternate ship-to addresses in Customer Ship-to Create (27.20.2.1)

### Exercise: Create Ship-To Address

Namaka want to receive the shipments at a location different from the corporate offices.

Since Nakama is an existing customer, the customer address has already been defined as part of AR setup. However, you do need to set up a ship-to address.

Use Customer Ship-to Create (27.20.2.1).

- 1 Create the Ship-To Addresses for the Namaka plant.

Field	Data
Customer Code:	30C1002
Ship-to Code:	f001

- 2 Click Create.


- 3 Enter the following values in required fields in the Address Information frame:

Field	Data
Zip/City:	90024 Los Angeles
State:	CA
Country Code:	USA

- 4 Click Save.


## Customer Calendars

### QCS Setup



- Item Records \*
- Customer Records \*
- **Customer Calendars**
- QCS Control Programs
- Status Codes
- EDI eCommerce \*
- Sequence Scheduled Order

\* Optional

 QAD CSS-SU-160

QAD Enterprise Applications 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, and so forth
- Allows you to calculate a ship date acceptable to you and your customer

## Customer Calendar Maintenance (7.3.1)

### Customer Calendar Maintenance

Customer/Ship-To: 1004000      WORLDWIDE BUSINESS SUPPLY

Work Day	Hours
Sunday: <input type="checkbox"/>	0.00
Monday: <input checked="" type="checkbox"/>	8.00
Tuesday: <input checked="" type="checkbox"/>	8.00
Wednesday: <input checked="" type="checkbox"/>	8.00
Thursday: <input checked="" type="checkbox"/>	8.00
Friday: <input checked="" type="checkbox"/>	8.00
Saturday: <input type="checkbox"/>	0.00

**Operating Day Hour Exceptions**

Reference:

Start:

End:       Daily Hours:

Defaults to 8 hours per  
day,  
Monday through Friday

CSS-SU-170

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

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

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

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

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

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

## Exercise: Customer Calendar

Create a calendar for the ship-to location.

Use Customer Calendar Maintenance (7.3.1).

- 1 Create a calendar for the ship-to plant by entering:

Field	Data
Customer Ship-To:	f001

- 2 Accept the default values.

## QCS Control Program Setup

### QCS Control Program Setup

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



CSS-SU-190

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

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

## Sequence Schedule Control (7.5.4.24)

# Sequence Schedule Control

Sequence Schedule Control

Go To Actions Copy Print Preview

Enable Sequence Schedules:  ←

Schedule Order Default:

Include Seq in Req Ship Sched:

Firm Days:

Packing Order:

Sequences Per Container:

Merge Schedules:

Check Sequence Tolerance:

Maximum Tolerance:

Print Sequence Range on Shipper:

Print Sequence Range on Invoice:

Send Sequence with ASN:

Send Sequence with Invoice:

Back Next


Set to Yes to Activate Sequence Schedules

QAD CSS-SU-210

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


## QCS Control Programs

### QCS Setup



- Item Records \*
- Customer Records \*
- Customer Calendars
- **QCS Control Programs**
- Status Codes
- EDI eCommerce \*
- Sequence Scheduled Order

• \* Optional

 CSS-SU-200

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

## Sequences Per Container Option: Example

**Sequences Per Container Option: Example**

Ship To: 01000036  
Northwest Reliable  
1000 B Street

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

Coos Bay  
United States of America


Packing Order: forward  
Sequences Per Container: 2

Customer Dock:  
Line Feed:

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

The diagram illustrates the 'Sequences Per Container Option' with annotations:

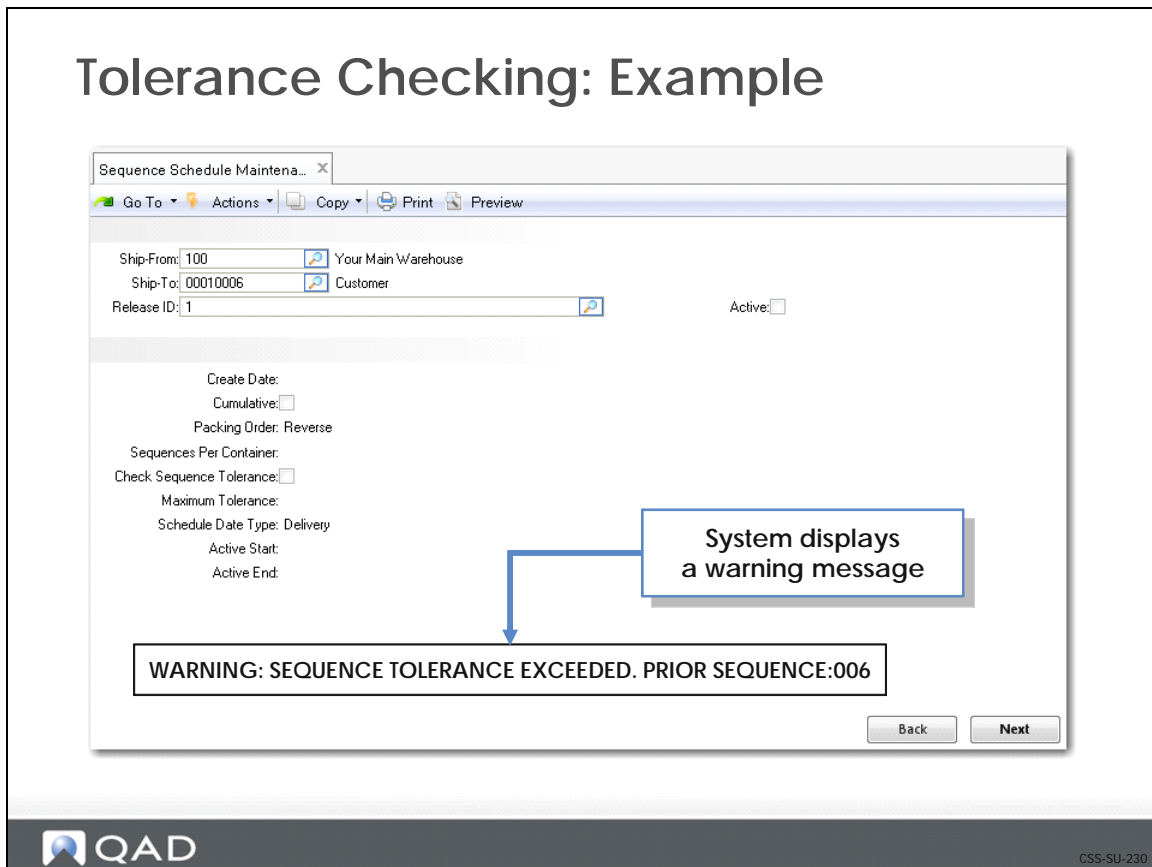
- Container Parameter:** A box pointing to the 'Sequences Per Container: 2' field in the packing order information.
- Separator:** A box pointing to the 'Container (' field in the sequence pack list, which separates the two sequences (001 and 002) for the first container.

 CSS-SU-220

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

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

## Tolerance Checking: Example



The 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

**Print Sequence Range on Pre-Shipper: Example**

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


  

Item Number	PO Number	Qty Shipped	Cumulative Qty Shipped U
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.

Set the Print Sequence Range on Shipper field to Yes in the control program.

## Print Sequence Range on Invoice: Example

**Print Sequence Range on Invoice: Example**

Quality Products Inc. I N V O I C E  
 Div/Consolidated Corporation  
 Suite 1, Consolidated Bldg. Invoice: IV645    Revision: 0  
 One Consolidated Plaza Invoice Date: 02/01/00    Page: 1  
 San Diego, CA 92130 Print Date: 02/01/00  
 United States of America

Bill To: 01000036 Sold To: 01000036

**Sequence Ranges**

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

Customer Job: 20000128

Customer Sequence	Sequence Ranges To
001	005

QAD CSS-SU-250

### Sequence Range on Invoice

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

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

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

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

## Exercise: Enable Customer Sequence Schedules

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

Use Sequence Schedule Control (7.5.4.24).

- 1 Turn on the Customer Sequence Schedules module if it is not already enabled and define other parameters. Use the values from the following table.

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

## Customer Controls Maintenance (7.5.4.1)

# Customer Controls Maintenance

Customer Controls Maintenance

Go To Actions Copy Print Preview

Ship-To: 1004000 WORLDWIDE BUSINESS SUPPLY

Include Seq in Req Ship Sched:

Firm Days:

Packing Order:

Sequences Per Container:

Merge Schedules:

Check Sequence Tolerance:

Maximum Tolerance:

Print Sequence on Shipper:

Print Sequence on Invoice:

Send Sequence with ASN:

Send Sequence with Invoice:

Settings Only Apply To This Customer/Ship-To Address

Delete Back Next

QAD CSS-SU-270

Use Customer Controls Maintenance (7.5.4.1) to create customer control records. These are customer specific default values that are different from the system wide default values specified in Sequence Schedule Control (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 Sequence Schedule Control
- Settings entered here default to sequence schedules created for the ship-to address
- These settings override the corresponding Sequence Schedule Control settings for the individual customer/ship-to address

**Note** Customer control settings are optional.

## Status Codes

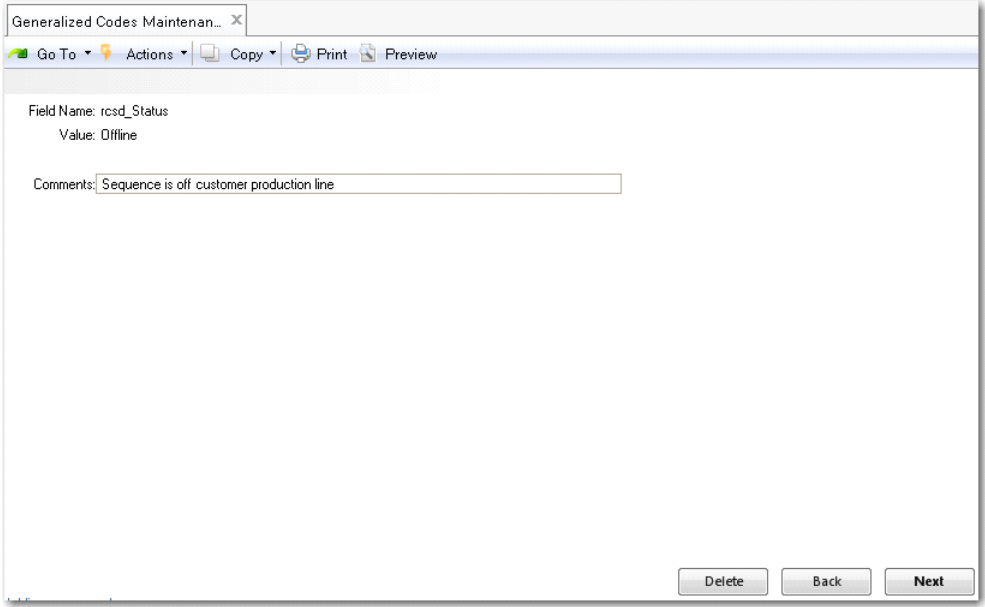
### QCS Setup



- Item Records \*
  - Customer Records \*
  - Customer Calendars
  - QCS Control Programs
  - **Status Codes**
  - EDI eCommerce \*
  - Sequence Scheduled Order
- \* Optional

## Generalized Codes Maintenance (36.2.13)

# Generalized Codes Maintenance



Generalized Codes Maintenance

Field Name: rcsd\_Status  
Value: Offline

Comments: Sequence is off customer production line

Delete Back Next

QAD CSS-SU-290

Use Generalized Codes Maintenance (36.2.13) to set up status codes for field rcsd\_status.

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

## Exercise: Create Status Codes

In the following exercises you need to use status codes.

Use Generalized Codes Maintenance (36.2.13).

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

Field	Data
Field Name:	rcsd_status

- 2 Create a second status code by entering:

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

- 3 Create a third status code by entering:

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

## EDI eCommerce

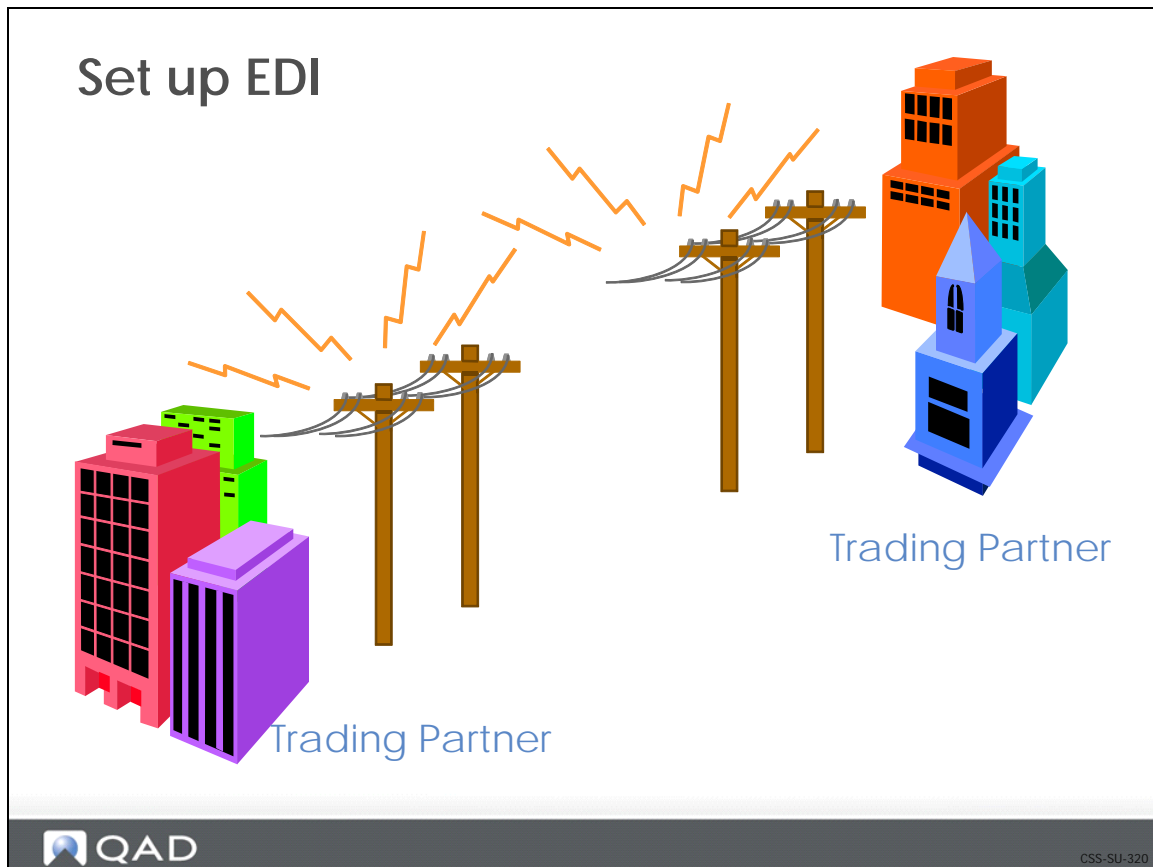
### QCS Setup



- Item Records \*
- Customer Records \*
- Customer Calendars
- QCS Control Programs
- Status Codes
- **EDI eCommerce \***
- Sequence Scheduled Order

\* Optional

## Set Up EDI eCommerce



You use the following functions to set up EDI eCommerce data:

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

## Exchange Definition Maintenance (35.15.6)

# Exchange Definition Maintenance

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

**Exchange File Records**

Seq	Record Name	Requirement	Loop Occur	Loop End	Seq Fields	XML
1	Header	Man	1	99	<input type="checkbox"/>	<input type="checkbox"/>
2	Header-Comments	Optional	99	2	<input type="checkbox"/>	<input type="checkbox"/>
12	Line-Items	Optional	99999	19	<input type="checkbox"/>	<input type="checkbox"/>
14	SalesOrderBill	Optional	999	14	<input type="checkbox"/>	<input type="checkbox"/>
19	Line-Comments	Optional	999	19	<input type="checkbox"/>	<input type="checkbox"/>

Delete    Back    Next

QAD

CSS-SU-430

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

**Note** An exchange file defines documents communicated between EC subsystems and QAD Enterprise Applications.



## Application Definition Maintenance (35.15.10)

# Application Definition Maintenance

Application Definition Maint
x

Go To Actions Copy Print Preview

Name: MFG850	Version: 1	Direction: Out
Gtwy Prgm: edompopr.p	Gtwy Rpt Prgm: edompopr.p	QAD
	Gtwy Process Priority: 1	

**Application File Records**

Seq	Record Name	Requirement	Loop Occur	Loop End	Seq Fields
1	HDR	Man	1	0	<input type="checkbox"/>
2	HDR-CMT	Optional	99	2	<input type="checkbox"/>
3	DET	Mandatory	999	5	<input type="checkbox"/>
4	DET-EXT	Optional	99	4	<input type="checkbox"/>
5	DET-CMT	Optional	99	5	<input type="checkbox"/>

Delete Back Next

CSS-SU-450

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

## Implementation Definition Maintenance (35.15.13)

## Implementation Definition Maintenance


Implementation Definition Maint x
Go To ▾ Actions ▾ Copy ▾ Print Preview

Implementation Name: Schedule	Version: 1
Application Name: customer-schd	Version: 1
Direction: In	Desc: 866 Schedule
Advanced: <input type="checkbox"/>	Print Gateway Error Data: <input type="checkbox"/>

**Implementation File Records**

Seq	Record Name	Requirement	Loop End	Seq Fields	XML
1	HDR	Mandatory	1	0	<input type="checkbox"/>
2	HDR-EXT	Optional	1	0	<input type="checkbox"/>
3	HDR-CMT	Optional	999	0	<input type="checkbox"/>
4	DET	Mandatory	999999	7	<input type="checkbox"/>
5	DET-EXT	Optional	1	0	<input type="checkbox"/>
6	DET-CMT	Optional	999	0	<input type="checkbox"/>
7	ATH	Optional	100	0	<input type="checkbox"/>

Delete Back Next


CSS-SU-460

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

## Transformation Definition Maintenance (35.15.17)

### Transformation Definition Maintenance


Transformation Definition Maint X

Go To Actions Copy Print Preview

Transformation: MFG850	Dir: In	Can Run: <input checked="" type="checkbox"/>
Exchange File Name: MFG850	Version: 1	Debug level: 0
Application: MFG850	Version: 1	Many to Many: <input type="checkbox"/>
Implementation Name: MFG850	Version: 1	

**Transformation File Records**

Record Name	Ev	Seq	EQ	TQ	Target	Type	SQ	Source
Header	RE	10	E	I	Header	Read		
Header	RE	20	E	0	HDR.order-date	Equat	F	SysDate
Header	RE	30	E	0	HDR.tp-ship-to	Equat	F	getMFGPROAddress
Header	RE	40	E	0	HDR.tp-ship-fro	Equat	F	getMFGPROSite
Header	RE	50	E	0	HDR.purchase-or	Equat	I	Header.PONumber
Header	RE	60	E	0	HDR.credit-term	Equat	I	Header.CreditTe
Header	RE	70	E	0	HDR.due-date	Equat	I	Header.DueDate
Header	RE	80	E			If	F	notblank
Header	RE	90	E	0	HDR.due-date	Equat	F	ToDate
Header	RE	100	E			EndIf		


CSS-SU-470

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

- Inbound map representing customer's sequenced schedule

## Trading Partner Maintenance (35.13.7)

### Trading Partner Maintenance

Trading Partner Maintenance
Go To Actions Copy Print Preview

TP ID: HAUSEV Name: HONDA ALABAMA (USEV)


**Trading Partner Document Records**

TP Doc ID	Dir	Document Map	Transmission Group	Token List	T	A	F
830	In	hondadelta-830-dmo			<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
850	In	hondadelta-850-dmo			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
856	Out	hondadelta-856-dmo	OUTGENQP		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
862	In	hondadelta-862-dmo			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**TP Location Cross-Reference**

TP Site	TP Address Reference	Token List Values	Site	App Addr	Exp	T/O
192774347	827961264		10000	HAUSEV	<input type="checkbox"/>	<input type="checkbox"/>
21061001	NSE2 01		10000	NSE201	<input type="checkbox"/>	<input type="checkbox"/>
21061001	NSE2 09		10000	NSE209	<input type="checkbox"/>	<input type="checkbox"/>
21061001	NSE5 17		10000	NSE517	<input type="checkbox"/>	<input type="checkbox"/>

Delete Back Next


CSS-SU-480

Use Trading Partner Maintenance (35.13.7) to:

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


## Trading Partner Parameter Maintenance (35.13.10)

### Trading Partner Parameter Maintenance

Trading Partner Parameter Mai... x  
Go To Actions Copy Print Preview

App Addr: 10001000	TP Address:
App Site: Site-10	TP Site:

Logical Param Desc	Logical Parameter Value
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>

CSS-SU-490

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

## Sequence Scheduled Order

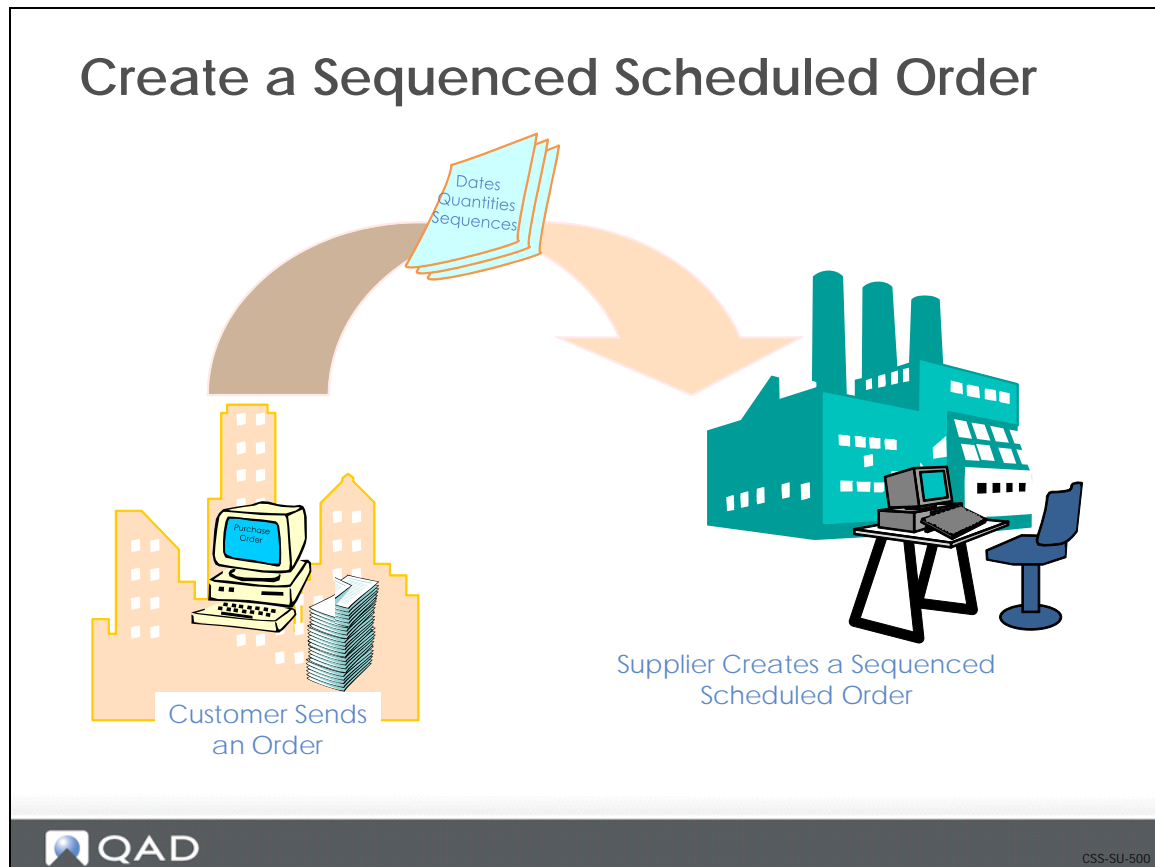
### QCS Setup



- Item Records \*
- Customer Records \*
- Customer Calendars
- QCS Control Programs
- Status Codes
- EDI eCommerce \*
- **Sequence Scheduled Order**

\* Optional

## Create a Sequenced Scheduled Order



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

## Customer Scheduled Order Maintenance (7.3.13)

### Customer Scheduled Order Maintenance

Customer Scheduled Order Ma... x

Go To Actions Copy Print Preview Attach

Ship-From:10-300 Bill To:30C1002 AR Site:10-300

Ship-From: 10-300 Order: S0101  
Ship-To: f001 Namaka Motor Company

Order Data

Ship Via: **FEDX**

Taxable:

Week Offset: 0

Inv by Auth:

Include Sat/Sun:

Cumulative:

Consignment:

Bill To: 30C1002

Auto Inv Post:

Import/Export:

Sequenced:

Dynamic Unpeg:

Entered By: qmi

Remarks:

FOB Point:

Transport Days: 0.00

Trade Sales:

Customer Ref Is Customer Item:

Print Invoice History:

EDI Invoice History:

Print Pack List:

Comments:

Channel:

Ship to Cum/Req: Cum

Customer/Shop: Y

Back Next

**Determines the Transport Lead Time**

**Yes Indicates This is a Sequence Scheduled Order**

QAD CSS-SU-520

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

### Order Data Frame

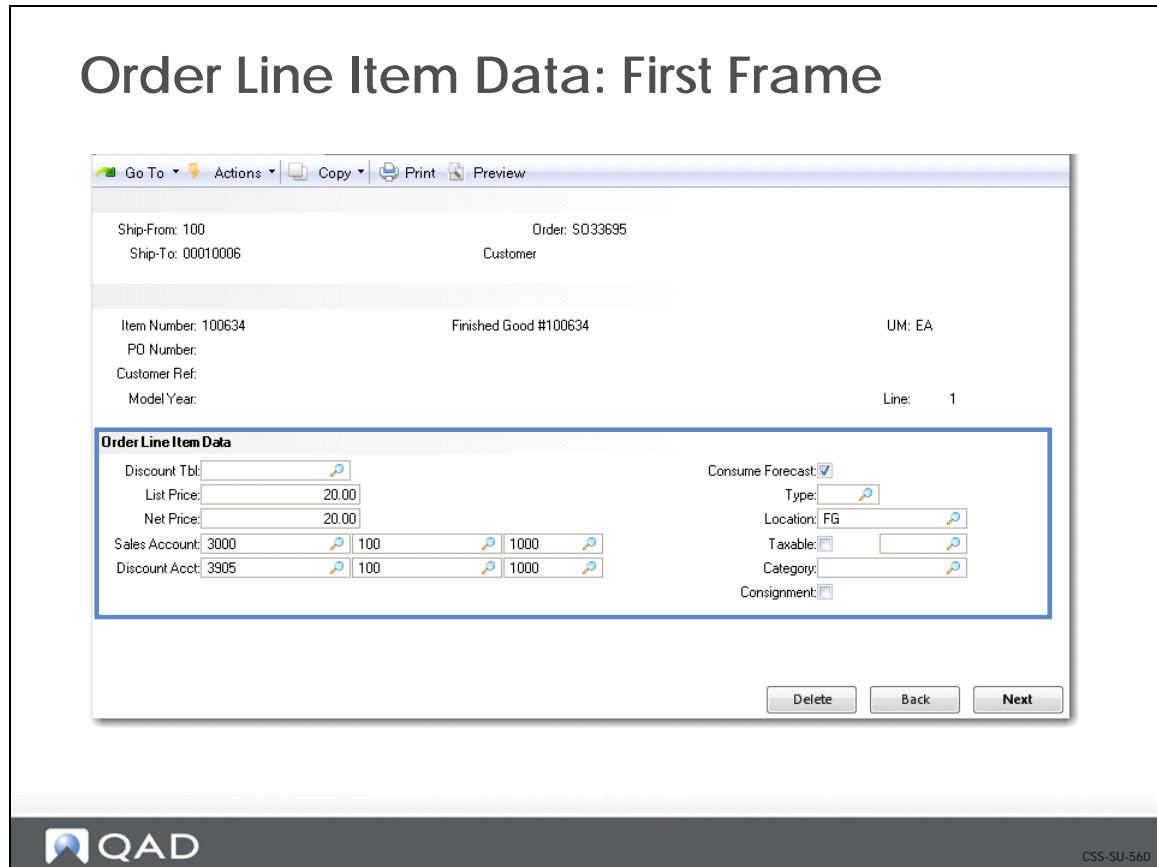
In the Order Data frame you set up the scheduled order parameters.

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





Order Line Item Data: First Frame



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

### Order Line Item Data: Second Frame

## Order Line Item Data: Second Frame

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

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

**Order Line Item Data**

Req Sched Days: 0      Dock:

Req Sched Weeks: 0      Start Effective:

Req Sched Months: 0      End Effective:

Fab Auth Days: 0      Max Order Qty: 0.0

Raw Auth Days: 0      Std Pack Qty: 1

Customer Item:

Container Item:  Alternates:

Charge Type:

Plan SDP Code:

Plan SDT Code:

Ship SDP Code:

Ship SDT Code:

Netting Logic:

Cum Start: 12/22/2008

Comments:

**1/3 - Mon/Wed/Fri**

**Connection with Firm Days**

QAD CSS-SU-570

## Exercise: Create Scheduled Order

### SUV Assembly Plant

You are now ready to create a Scheduled Order

Use Customer Scheduled Order Maintenance 7.3.13

- 1 Create a scheduled order.

Field	Data
Ship-From:	10-200
Ship-To:	f001
Order:	SO100

- 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
Incl Seq in Req Ship Sched:	Yes
Firm Days:	0

- 4 Advance to the line item frame and enter:

Field	Data
Item:	part1
Line:	1

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

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

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

Advance to the line item frame and enter:

Field	Data
Item:	part2
Line:	2

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

Field	Data
Req Sched Days:	5
Req Sched Weeks:	3
Req Sched Months:	1
Netting Logic:	2

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

Field	Data
Item:	part3
Line:	3

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

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

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

Field	Data
Item:	part4
Line:	4

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

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

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

Field	Data
Item:	part5
Line:	5

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

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

## QCS Setup Summary

### QCS Setup Summary



- Item Records \*
- Customer Records \*
- Customer Calendars
- QCS Control Programs
- Status Codes
- EDI eCommerce \*
- Sequence Scheduled Order

\* Optional

Chapter 4

# **Loading Sequence Schedule Release**

## Load QCS Release

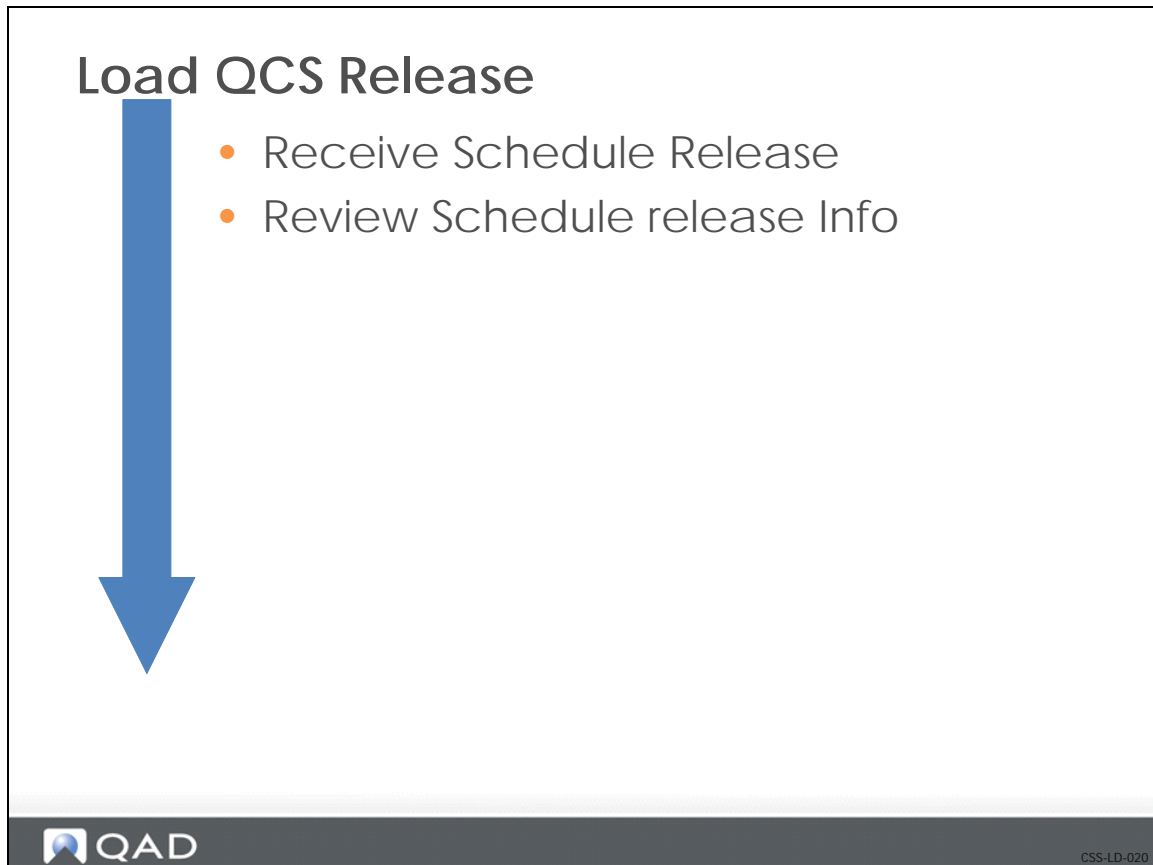
In this section you learn how to:

- Identify key business considerations before setting up QCS in QAD Enterprise Applications
- Set up QCS in QAD Enterprise Applications
- **Loading QCS in QAD Enterprise Applications**
- Planning QCS in QAD Enterprise Applications
- Shipping QCS in QAD Enterprise Applications
- QCS Features and Options



CSS-LD-010


## Load QCS Release




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

## Receive Schedule Release

### Load QCS Release



- Receive Schedule Release
- Review Schedule release Info


CSS-LD-030

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 with dates, times, and quantities
- The most recently received schedule release normally supersedes all previous schedule releases
  - Raw and fabrication authorization are an exception to this
  - The longest authorizations, calculated by end date, are the valid ones

There are two types of schedule releases supported by QAD Enterprise Applications. 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 (weekly, monthly buckets)
- Shipping Schedule (862, Deljit) shows short-term planning (daily buckets) and is usually the more accurate

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

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

## Exercise: Planning Schedule

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

**Note** No Planning Schedule needed for Line 1.

Use Customer Plan Schedule Maintenance (7.5.1)

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

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

- 2 Advance to the lower frame and enter:

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

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

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

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

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

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

- 6 Advance to the lower frame and enter:

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

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

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

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

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

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

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

10 Advance to the lower frame and enter:

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

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

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

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

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

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

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

14 Advance to the lower frame and enter:

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

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

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

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

## Exercise: Shipping Schedule

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

Use Customer Ship Schedule Maintenance (7.5.2)

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

- 2 Advance to the lower frame and enter.

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

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

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

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

**Note** No Shipping Schedule needed for line 2.

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

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

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

- 6 Advance to the lower frame and enter.

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

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

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

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

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

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

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

10 Advance to the lower frame and enter.

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

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

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

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

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

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

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

14 Advance to the lower frame and enter.

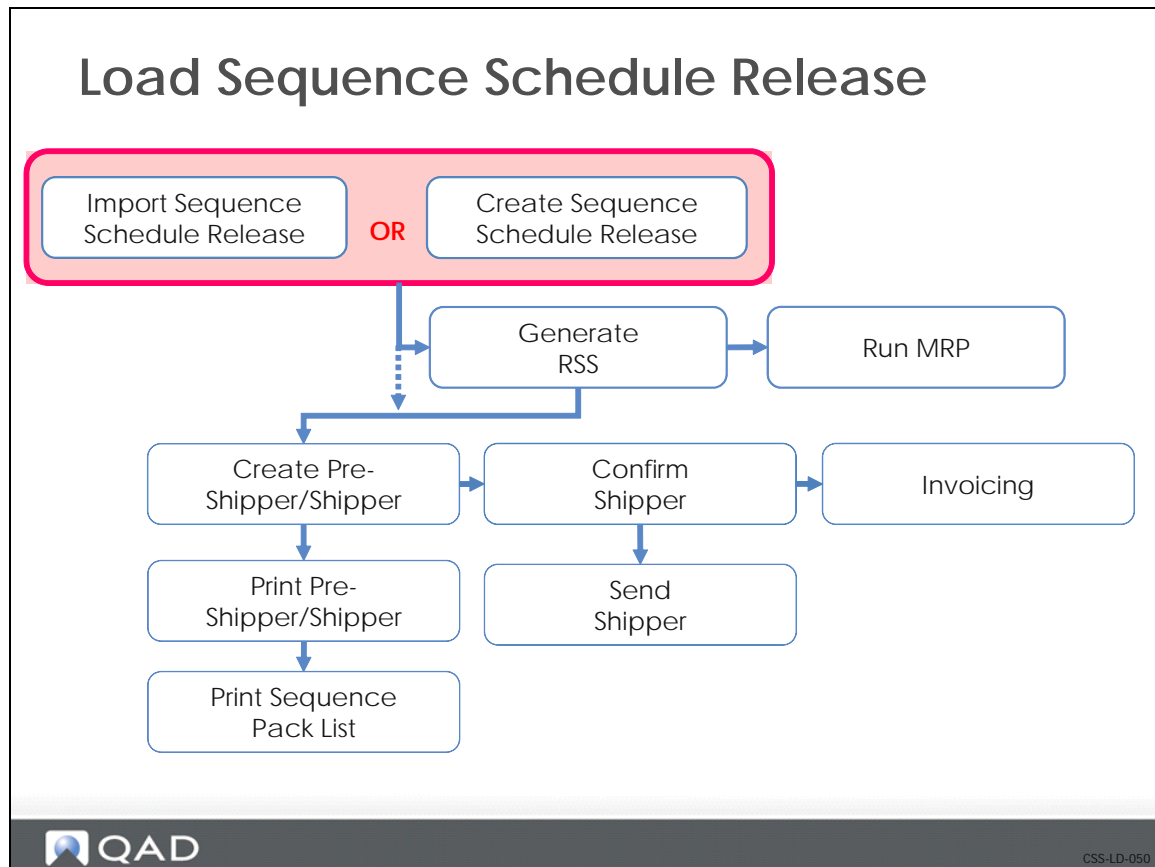
Field	Data
Comments:	No
Prior Cum Date:	<Yesterday's Date>
Schedule Data Type:	Ship

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

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

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

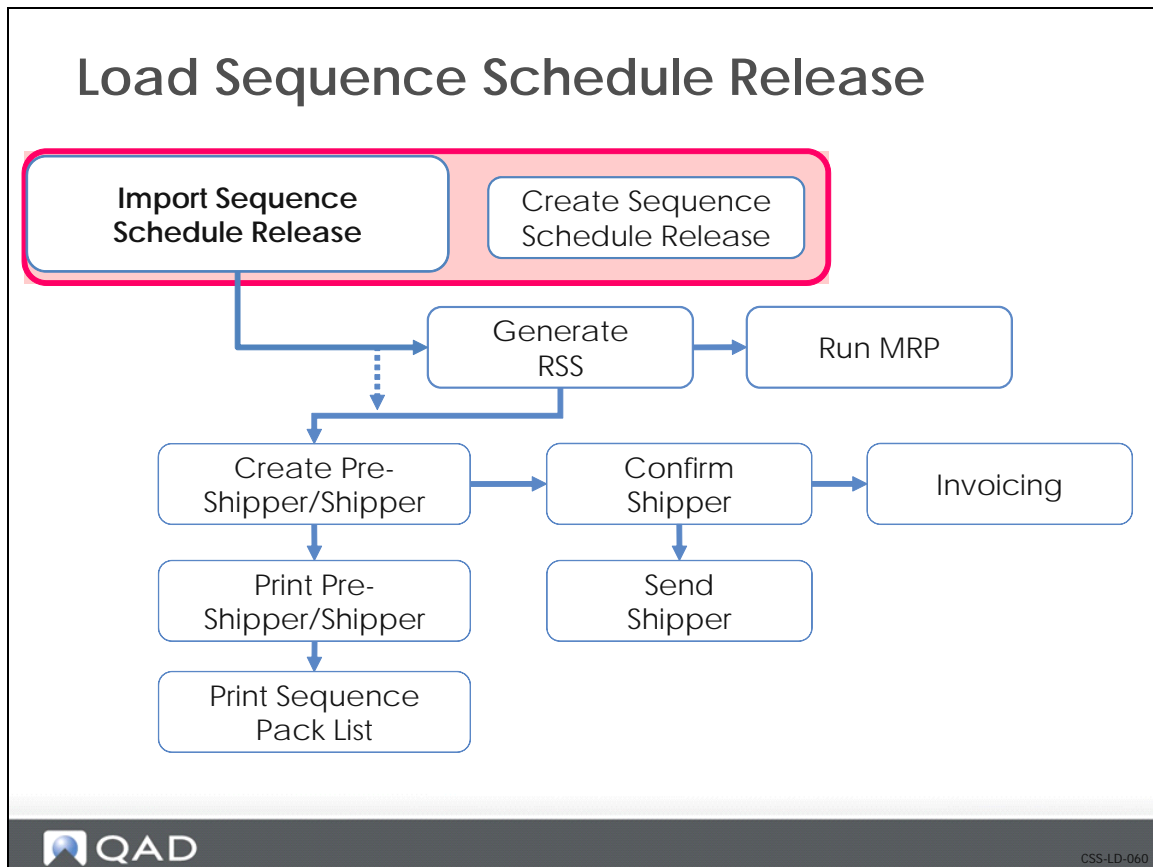
## Load Sequence Schedule Release



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

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

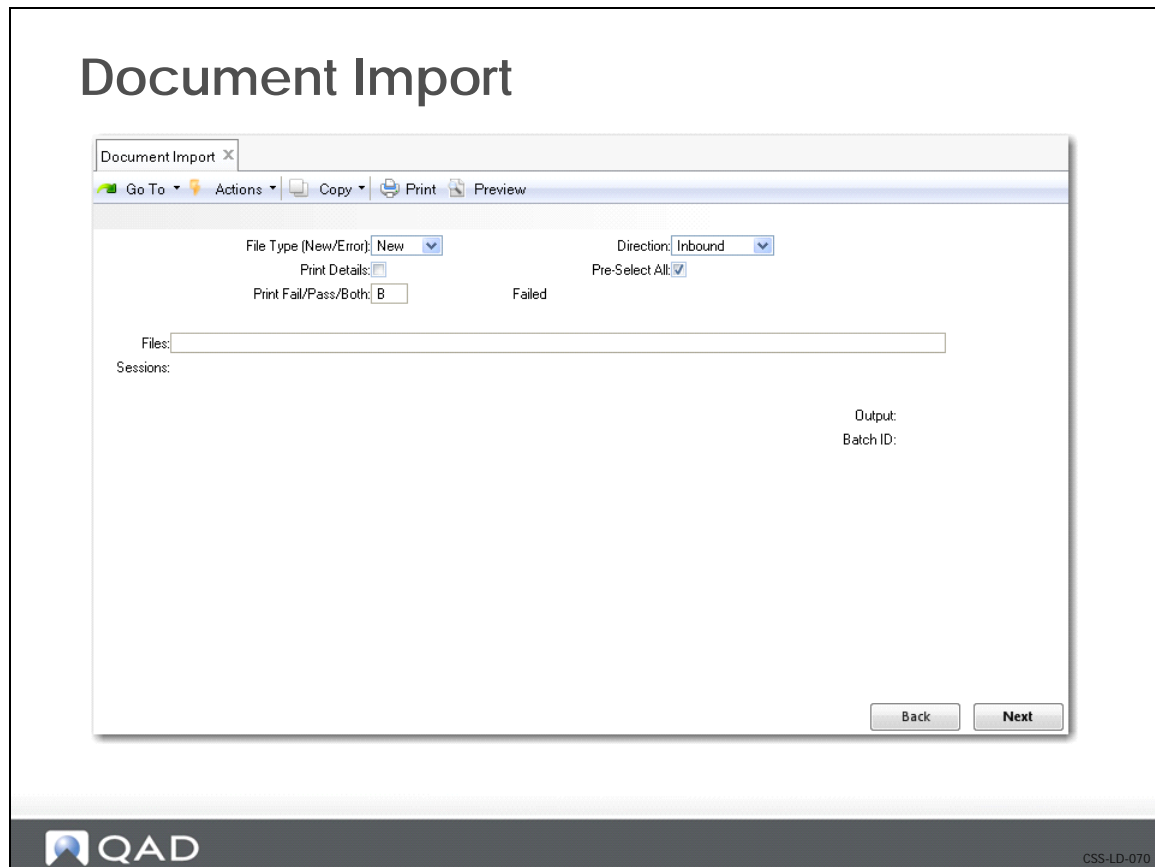
## Import Sequence Schedule Release



There are two ways to import a sequence schedule release:

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

## Document Import (35.1)



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

The system generates a report on the import process.

**Note** Import directory specified in Inbound Directory field in eCommerce Control (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 eCommerce Control.

## Shipper Gateway

The screenshot shows a web browser window titled "Shipper Gateway". The browser's address bar contains "Shipper Gateway" and the page title is "Shipper Gateway". The browser's menu bar includes "Go To", "Actions", "Copy", "Print", and "Preview". The main content area of the page has a large heading "Shipper Gateway" at the top. Below the heading, there is a form with the following elements:

- A dropdown menu labeled "Process/File:" with "File" selected.
- A text input field labeled "File Name:".
- A checkbox labeled "Load Multiple Containers:".
- A checkbox labeled "Verify Only:".
- An "Output:" label.

At the bottom right of the form area, there are two buttons: "Back" and "Next".

The QAD logo is visible in the bottom left corner of the page, and the text "CSS-LD-080" is in the bottom right corner.

Use Shipper Gateway import an ASCII formatted file.

- Contains fields for customer sequence information

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

## Exercise: Import Sequence Schedule

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

Use Document Import (35.1)

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

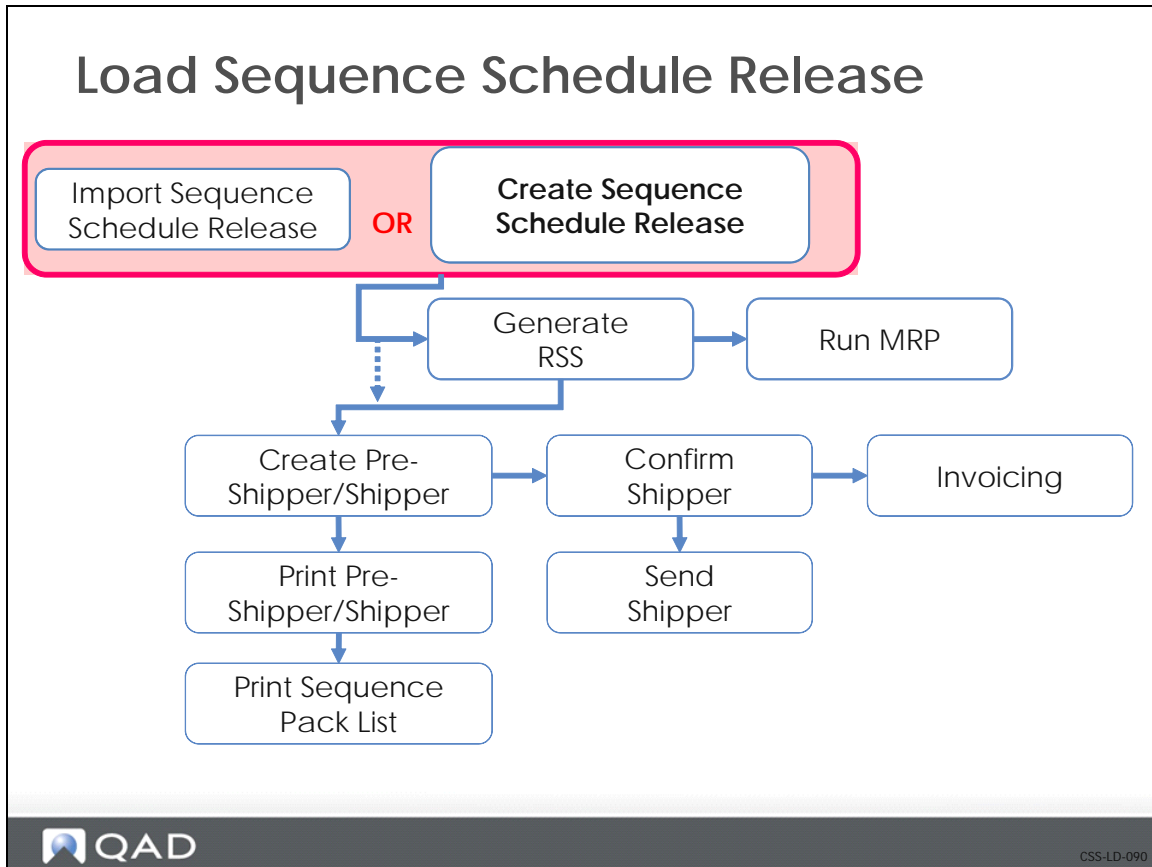
Field	Data
Import from File/Process:	File
Import File/Process Name:	train1.886
Report Detail/Summary:	Detail
Update:	No

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

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

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

## Create Sequence Schedule Release



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

## Sequence Schedule Maintenance (7.5.4.5)

Use Sequence Schedule Maintenance (7.5.4.5) to:

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

### Creating a New Release

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

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

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

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

If you choose No, then the system:

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

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

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

#### Header Frame

In the header frame you identify the sequence schedule.

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

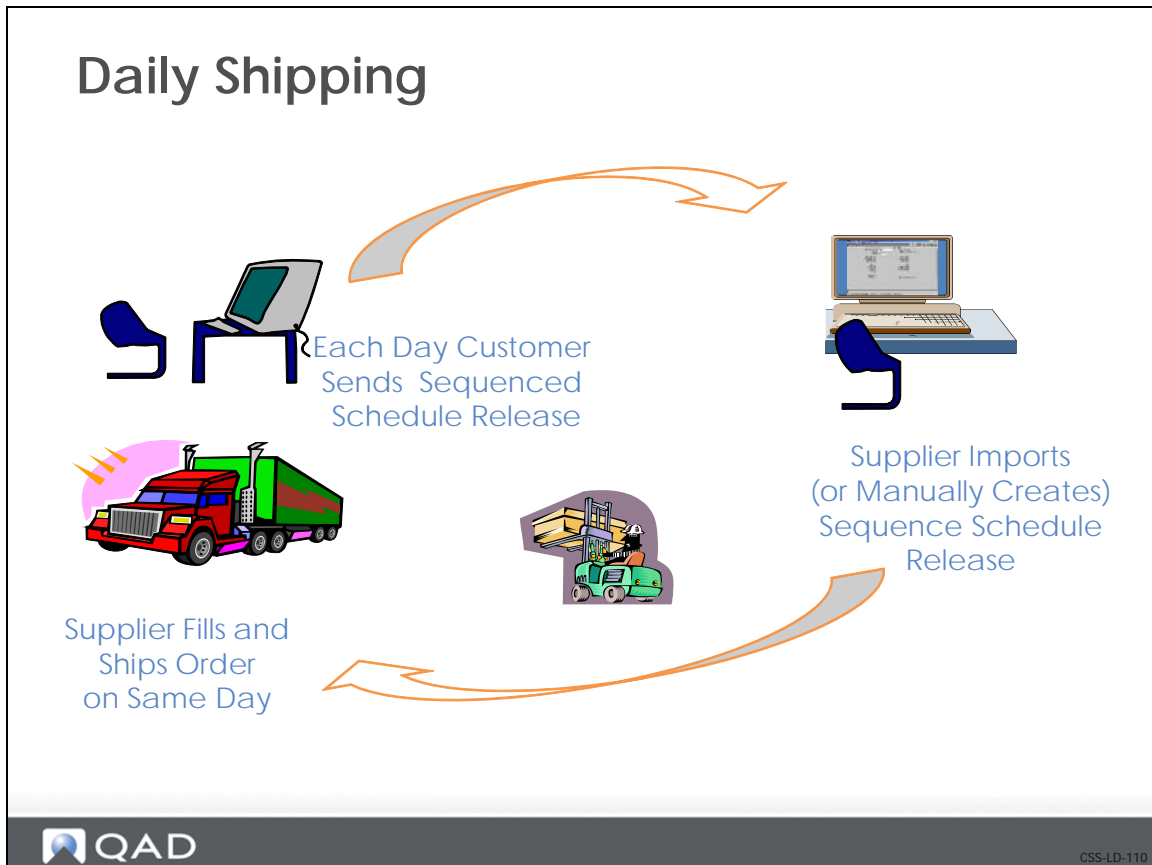
#### Sequence Schedule Maintenance (7.5.4.5) Detail Data Frame

Use the Sequence Detail Data frame to:

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

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

## Daily Shipping



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

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

## Review Schedule Release Information

### Reviewing Schedule Release Information

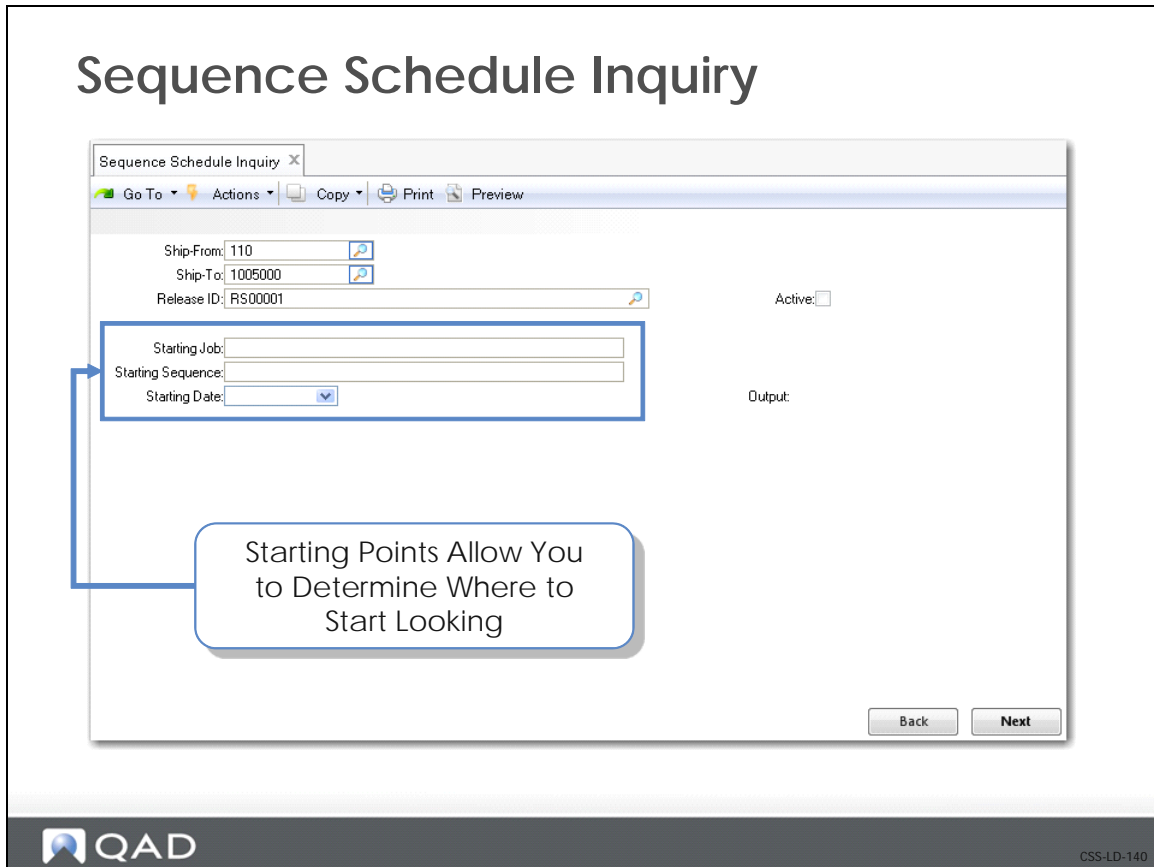
You can use any of the following to review and/or compare sequence schedule information. This is particularly useful if you have imported the sequence schedule information.

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



CSS-LD-120

## Sequence Schedule Inquiry (7.5.4.6)



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

Can view all or all from a specified starting point


## Sequence Schedule Report (7.5.4.7)

### Sequence Schedule Report

Sequence Schedule Report
Go To Actions Copy Print Preview

Ship-From: 110	To: 10
Ship-To:	To:
Release ID:	To:
Customer Job:	To:
Customer Sequence:	To:
Line Item Cust Ref:	To:
Model Year:	To:
Customer Reference:	To:
Item Number:	To:
Order:	To:
PO Number:	To:
Status:	To:
Ship/Delivery Date:	To:
Active/History: Active	
Include Sequences: 1 1-All, 2-Picked Only, 3-Unpicked Only	
Include Deleted: <input type="checkbox"/>	
Details: <input type="checkbox"/>	Sub-Totals: <input type="checkbox"/>

Sequences Marked  
as Deleted Not  
Included in the Report


CSS-LD-150

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

- Gives you a snapshot of what is going on

The report criteria gives you the option of:

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

## Sample Detail Report

### Sample Detail Report

```

rcrp05.p                               7.5.4.7 Sequence Schedule Report      Date: 01/28/00
Page: 1                                 Public Test Progress 91                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      Create Date: 12/10/99   11:54
Active Start: 12/09/99      Active End:             Packing Order: forward
Cumulative: no              Sequences Per Container: 0
Check Sequence Tolerance: yes      Maximum Tolerance: 2

Date: 12/08/99

```

Customer Job Customer Sequence	Item Status	Order UM Line	Customer Ref PO	Customer Dock Line Feed	Quantity Cum Quantity Delete
9110	100-1	EA ori-test 1	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-1D-160

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

Sample Report with Subtotals

## 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-170

The above graphic shows an example of the report with subtotals broken out by date.

## Exercise: Print Sequence Schedule Report

Use Sequence Schedule Report (7.5.4.7)

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

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

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

## Sequence Schedule Variance Report (7.5.4.16)

### Sequence Schedule Variance Report

Sequence Schedule Variance... x
Go To Actions Copy Print Preview

Ship-From:

Ship-To:

Item Number:

Order:

Variance %:

ABC Class:

To:

To:

To:


To:

Current Release ID:

Previous Release ID:

Use to Specify the Sequence Schedules You Want to Compare

Output:  
Batch ID:


CSS-LD-190

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

- Variance percentage reported
- Useful when looking for extremes

## Plan/Ship Sequence Variance Report (7.5.4.17)

**Plan/Ship Sequence Schedule Variance Report**

Plan/Ship Sequence Variance... x

Go To Actions Copy Print Preview

Ship-From:  To:

Ship-To:  To:

Item Number:  To:

Order:  To:

Variance %:  ← Use to Specify Percentage Reported

ABC Class:

Output:  
Batch ID:

Back Next

QAD CSS-LD-200

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

- Variance percentage reported

Chapter 5

# Planning

## Plan QCS

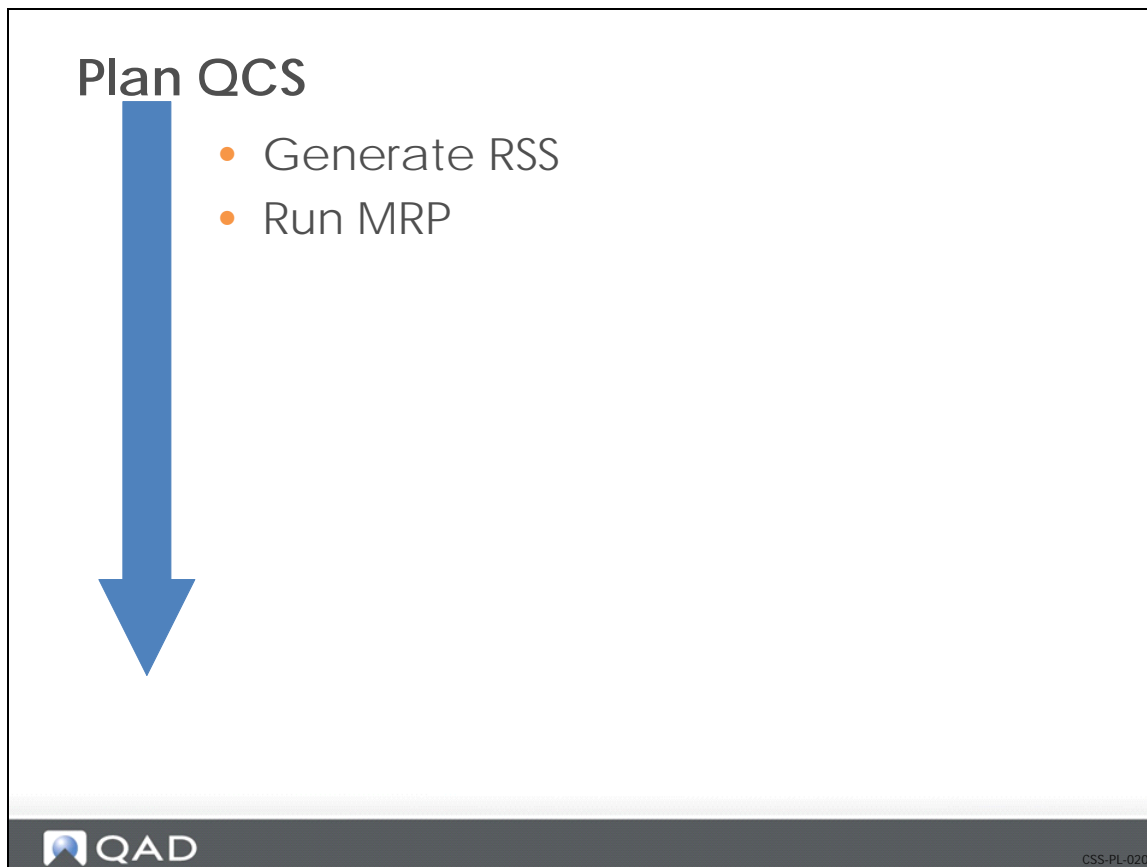
In this section you learn how to:

- Identify key business considerations before setting up QCS in QAD Enterprise Applications
- Set up QCS in QAD Enterprise Applications
- Loading QCS in QAD Enterprise Applications
- **Plan QCS in QAD Enterprise Applications**
- Shipping QCS in QAD Enterprise Applications
- QCS Features and Options



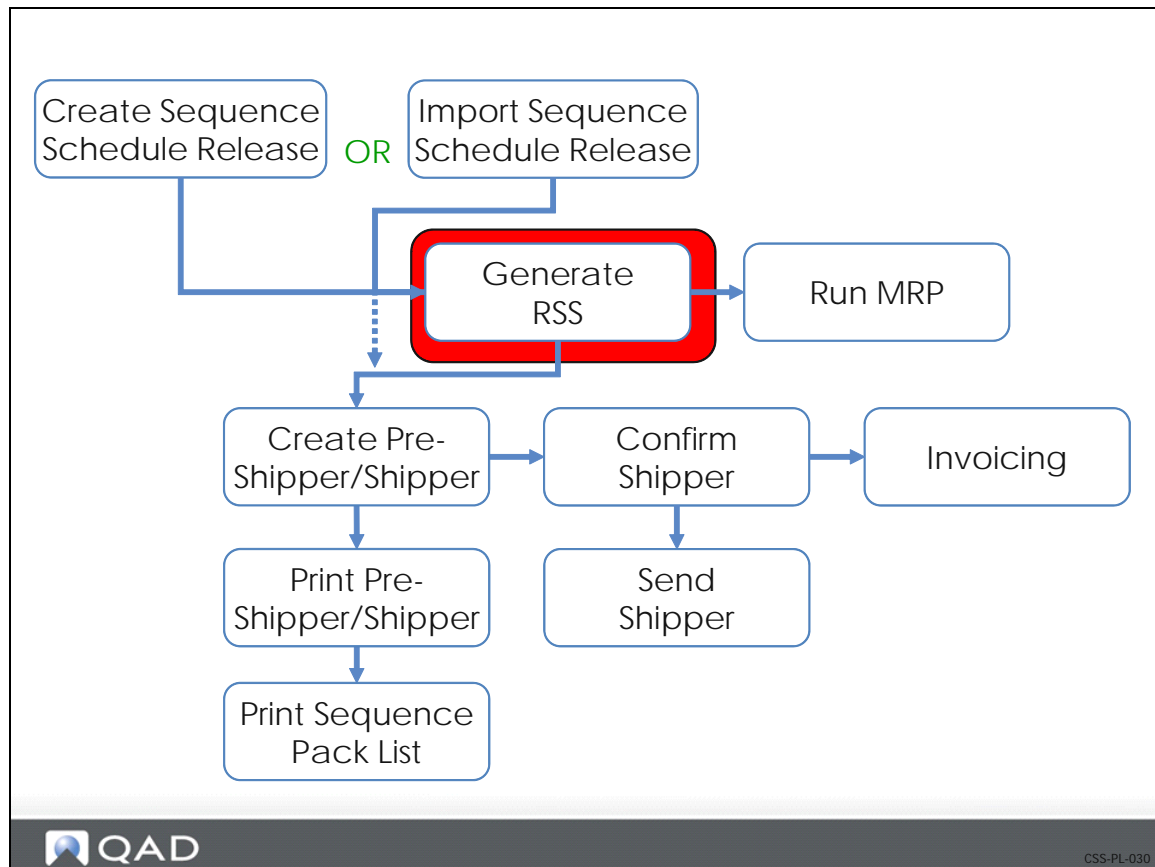
CSS-PL-010

## Plan QCS



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

## Generate RSS



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

Basically the RSS has two purposes:

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

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

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

## Required Ship Schedule Update (7.5.5)

### Required Ship Schedule Update

Required Ship Schedule Update x


Ship-From: <u>100000</u>	To: <u>200</u>
Sold-To: <u>200</u>	To: _____
Ship-To: _____	To: _____
Dock: _____	To: _____
Item Number: _____	To: _____
PO Number: _____	To: _____
Customer Ref: _____	To: _____
Model Year: _____	To: _____
Order: _____	To: _____

Report Detail/Summary: Summary  
Update: Yes

Output:  
Batch ID:

Determines if RSS is created

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


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

Use Required Ship Schedule Update to generate a new RSS.

The RSS:

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

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

Creating the RSS

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

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

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

If Sequenced is set to Yes in Customer 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 Customer Scheduled Order Maintenance
- If Include Seq in Req Ship Sched is set to Yes in Customer Scheduled Order Maintenance then the system includes the number of firm days from the sequence scheduled order
  - Defined in the Firm Days field of Customer Scheduled Order Maintenance

## Required Ship Schedule Update Report: Sequence Schedule

### 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      Quantity
-----
01/31/00  10:00      -----      4.0
02/01/00  10:00      -----      6.0ccx
                
```

Sequence Schedule

Summarized Quantities

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

Required Ship Schedule Update Report: Shipping Schedule

### 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: so2077          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:

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

Shipping Schedule

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

## Required Ship Schedule Update Report: Planning Schedule

### Required Ship Schedule Update Report: Planning Schedule

```

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


Customer Plan Schedule- Required Quantities
-----
Ship-From: 10000          Order: 502077          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 15:06:52
SDP Code:                Cumulative: no
SDT Code:
Int Purpose Code:
Ext Purpose Code:        Schedule Date Type: Delivery
Prior Cum Reg: 0.0       Active Start: 01/31/00
Prior Cum Date: 01/01/00 Active End:

Schedule Detail Data
-----
Date      Time  Int Reference          Quantity  Q  Cmt  Rqm
-----
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 image above shows an example of a Required Ship Schedule Update report using a planning schedule.

Required Ship Schedule Update Report: Netting Options Section

**Required Ship Schedule Update Report: Netting Options Section**

**New Section**

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

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

Plan Schedule Adjustment For Ship Schedule Overlap

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

Combined Schedule

Date	Time	Reference	Quantity	From
01/31/00			4.0	Seq Schedule
02/01/00			6.0	Seq Schedule
02/02/00			6.0	Ship Schedule
02/03/00			4.0	Ship Schedule
02/04/00			9.0	Ship Schedule
02/07/00	10:00		2.0	Ship Schedule
02/08/00	10:00		5.0	Ship Schedule
02/09/00	10:00		18.0	Plan Schedule

**Adjustment for Weekly Plan Quantity**

**Schedule Used**

QAD CSS-PL-090

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

Required Ship Schedule Update Report: RSS Schedule

## Required Ship Schedule Update Report: RSS Schedule

New RSS Schedule

```

rcrsup.p          7.5.5 Required Ship Schedule Update      Date: 02/03/00
Page: 6          Public Test Progress 91              Time: 11:38:12

Required Ship Schedule- Required Quantities
Ship-From: 10000      Order: 802077      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
                    Cumulative: no
Prior Cum Req: 0.0  Active Start: 02/03/00
Prior Cum Date: 01/01/00 Active End:
From Plan Id: 1
From Ship Id: 1

Schedule Detail Data
Date      Time  Int Reference      Quantity Q  Cmt  Rqm
-----
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
                    
```

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

## Selective Req Ship Sched Update (7.5.6)

### Selective Req Ship Sched Update

Selective Req Ship Sched Upd... x
Go To Actions Copy Print Preview

Ship From:

Order:

Line:

Ship To:

Item Number:

UM:

PO Number:

Customer Pref:

Model Year:

Ship Schedule Release ID:

Plan Schedule Release ID:


Sequence Schedule Release ID:

Report:

Update:

Output

Leave unchecked to Preview Changes


CSS-PL-110

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

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

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

## Exercise: Required Ship Schedule Update

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

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

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

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

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

Line 1:

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

Line 2:

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

Line 3:

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

Line 4:

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

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

Line 5:

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

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

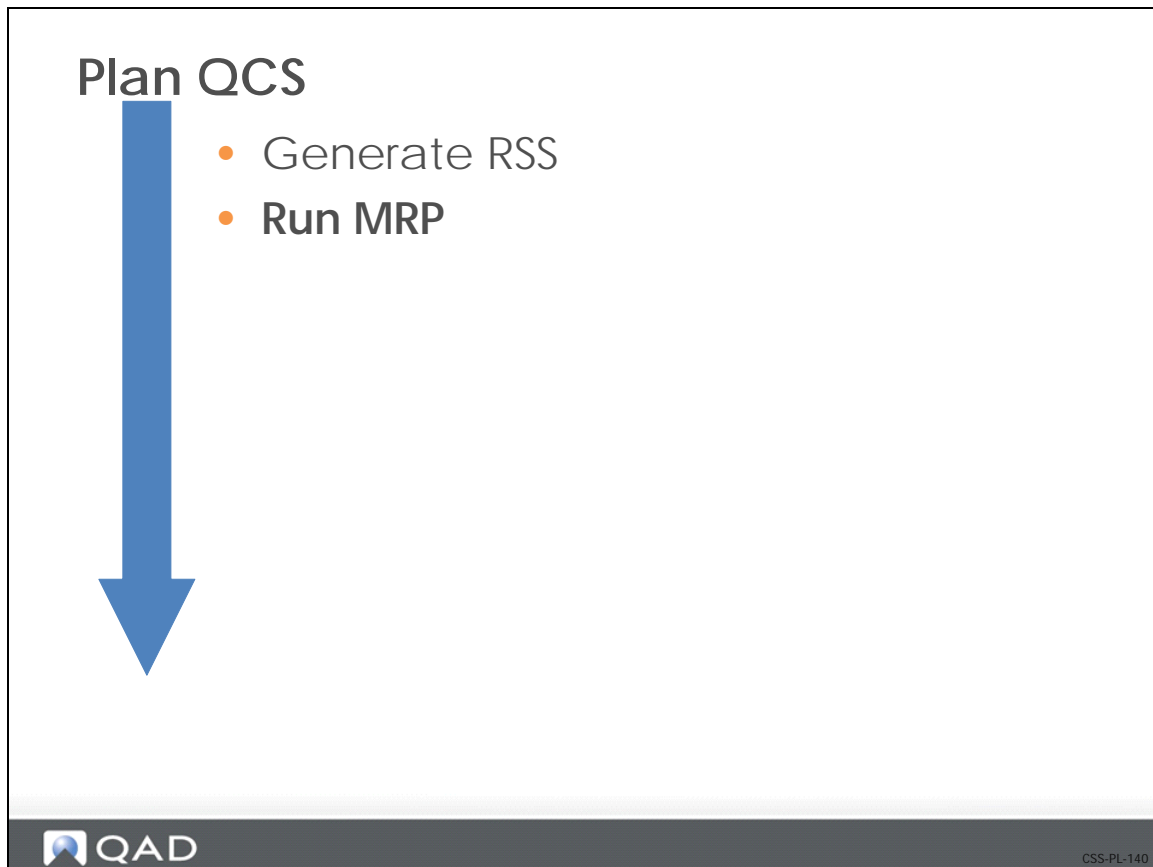
2 To generate the RSS, enter the following:

Use Required Ship Schedule Update (7.5.5)

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

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

## Run MRP



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

**Note** MRP only looks at the active RSS.

QAD Enterprise Applications offer you three ways to run MRP.

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

## MRP – Calculating Requirements

### MRP – Calculating Requirements

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

## MRP Detail Inquiry (23.16)

The screenshot shows a web browser window titled "MRP Detail Inquiry". The browser's address bar contains the text "MRP Detail Inquiry". The browser's menu bar includes "Go To", "Actions", "Copy", "Print", and "Preview". The main content area of the browser window displays the following information:

Item Number: 02-0005      Site: 100      Start Date: 12/29/2008  
MECHANICAL PENCIL      (5MM) BLISTER PACKED      Output: page

At the bottom right of the browser window, there are two buttons: "Back" and "Next".

At the bottom of the page, there is a dark grey footer bar containing the QAD logo on the left and the text "CSS-PL-160" on the right.

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

### Selection Criteria

#### Item Number/Site/Start Date

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

## MRP Detail Inquiry: Display

### MRP Detail Inquiry: Display

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

**MRP Detail Inquiry**
12/29/08

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

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

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

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

List complete

23.16
MRP Detail Inquiry
mrmpiq01.p

CSS-PL-170

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

## Plan QCS Summary

### Plan QCS Summary

- Generate RSS
- Run MRP





Chapter 6

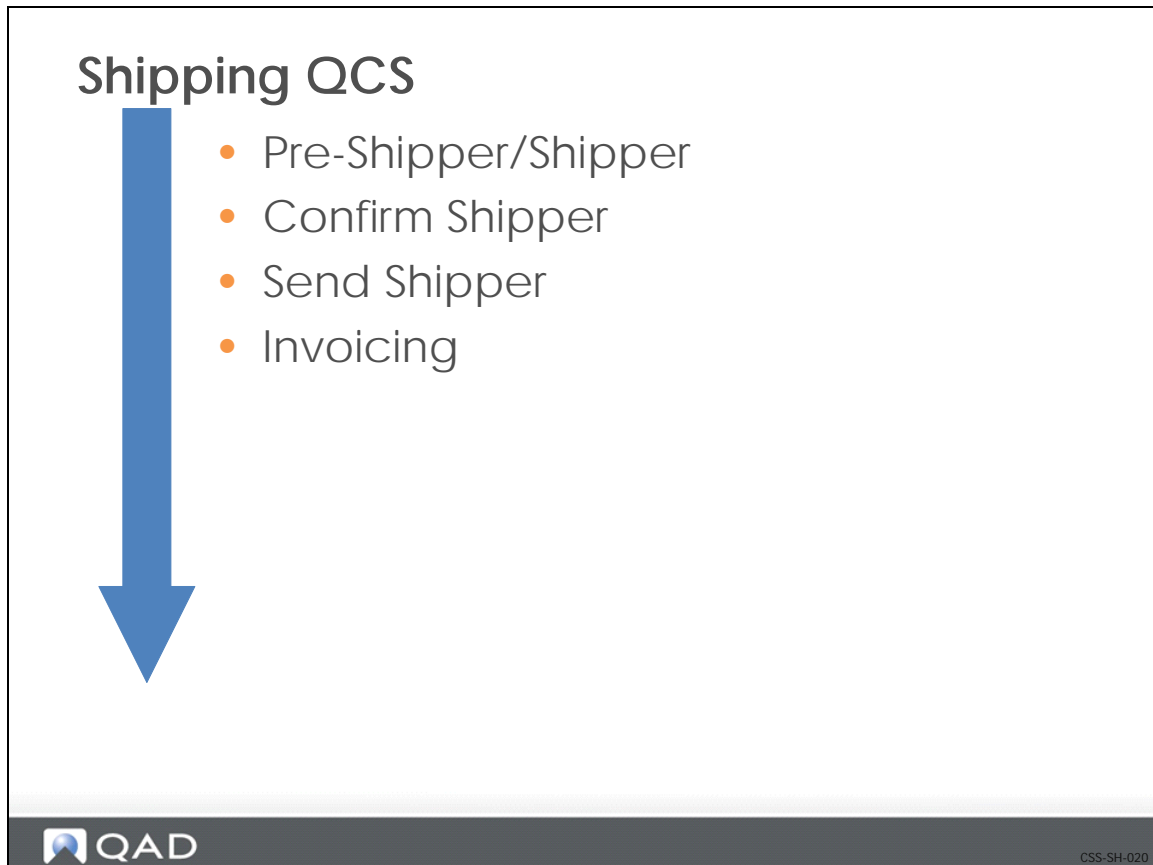
# Shipping

## Shipping QCS

In this section you learn how to:

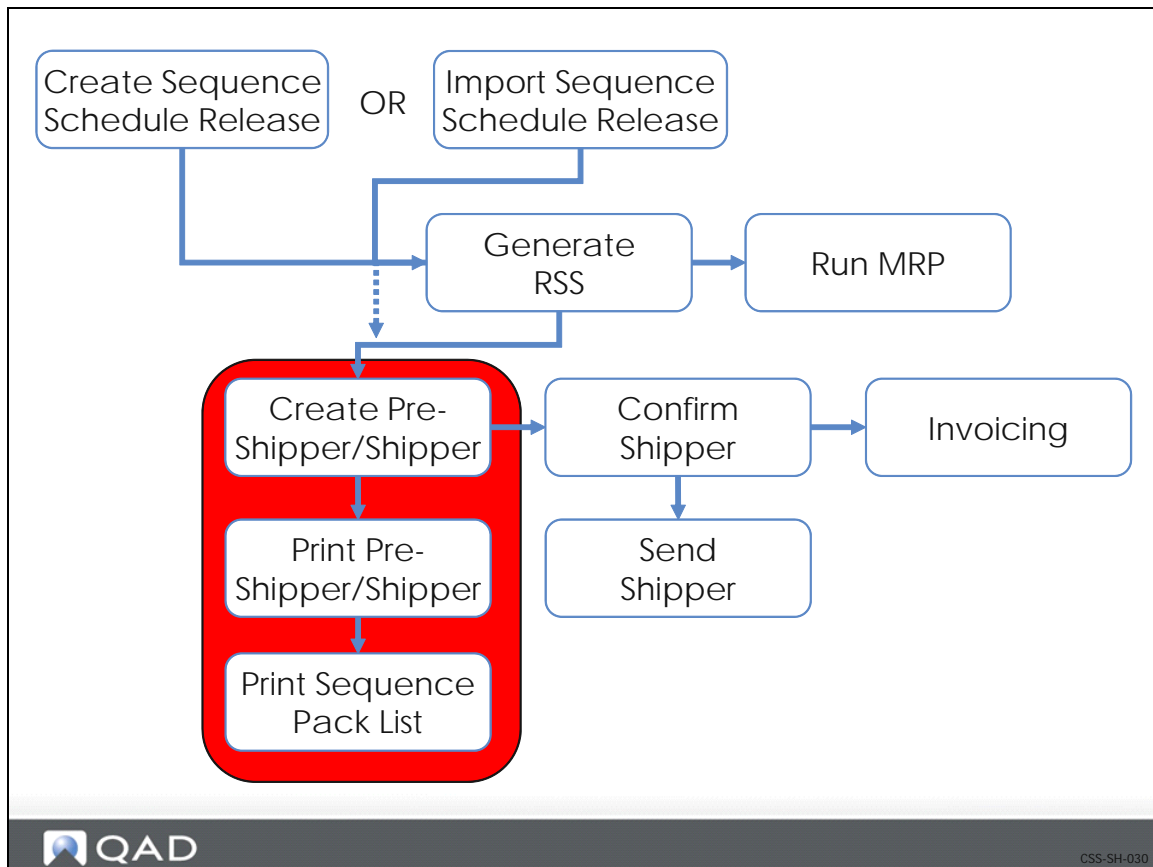
- Identify key business considerations before setting up QCS in QAD Enterprise Applications
- Set up QCS in QAD Enterprise Applications
- Loading QCS in QAD Enterprise Applications
- Planning QCS in QAD Enterprise Applications
- **Shipping QCS in QAD Enterprise Applications**
- QCS Features and Options

## Shipping QCS



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

## Create Pre-Shipper/Shipper



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

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

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

## Pre-Shippers and Shippers

### Shipping QCS



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

## Sequence Pre-Shipper Automatic (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 (for example, when the truck can hold so many items)

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

## Picklist/Pre-Shipper: Sample Report

## Picklist/Pre-Shipper: Sample Report

Ship To: 01000036

Northwest Reliable  
1000 B Street

Coos Bay  
United States of America

P I C K L I S T / P R E - S H I P P E R


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

Customer Dock:  
Line Feed:

Sales Order: so2077    Order Date:                      Ship To PO:

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

PO Nbr:


CSS-SH-060

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

## Sequence Pack List: Sample Report

### Sequence Pack List: Sample Report

Ship To: 01000036  
Northwest Reliable  
1000 B Street

United States of America

Packing Order: forward  
Sequences Per Container: 0

Customer Job  
Pack Customer Sequence  
Seq Customer Reference

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

Print Date: 02/01/00

Customer Dock:  
Line Feed:

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

Sequence

Second Page of Pre-Shipper

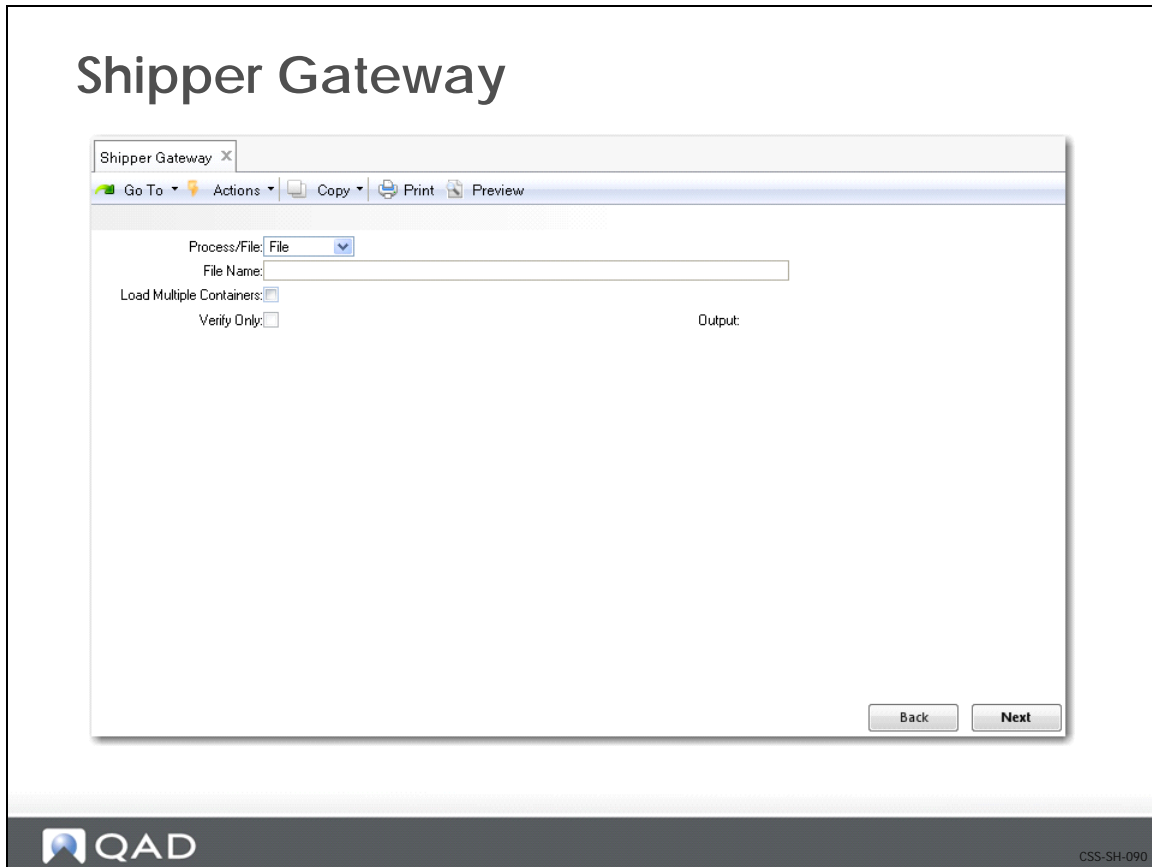
CSS-SH-070

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

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



## Shipper Gateway (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.

## Shipper Gateway: Sample Report

## 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: ESH000
Part:                    Lot/Serial:
Qty: 0                    Ship To: 001                Reference:
.....                    Order:
Kanban:

Shipper created ESH000.


      Type: i                Site: 17500                Location:
Ship From: 17500            Number:
Part: item y                Lot/Serial:                Reference:
Qty: 10                    Ship To:                    Order: so10063
Line: 1                    Parent: sESH000
Customer PO: po100          Qty UM: EA                Ship Weight: 0
Weight UM:                Volume: 0                Volume UM:
Net Weight: 0              Ship Via:                Fob:
Carrier Ref:                Trans Mode:
Vehicle Ref: vin100        Tare Weight:
Customer Job: job1
Customer Seq: seq1
Customer Doc: dock1
Line Feed: line1
Kanban:

Item added to shipper item y.

```

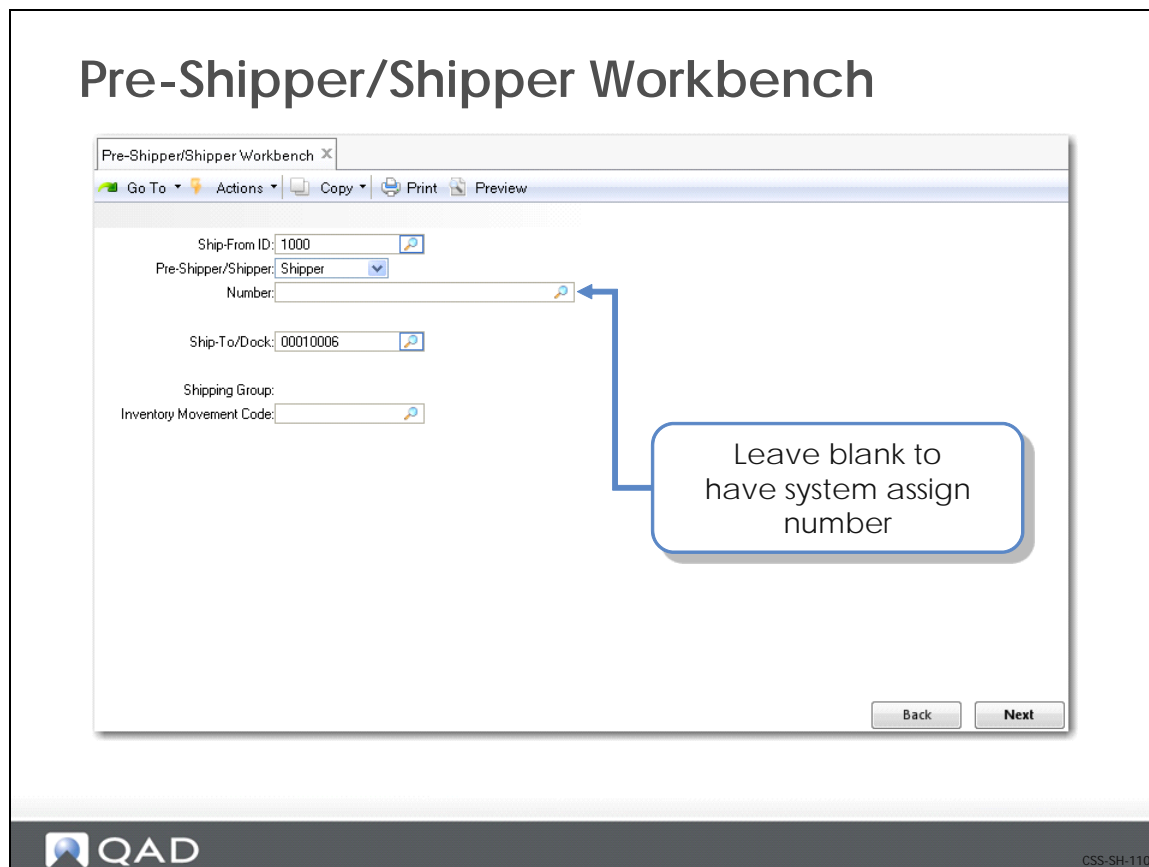
Sequence Data

Shipper Gateway: Sample Report (7.9.22)

 CSS-SH-100

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

## Pre-Shipper/Shipper Workbench (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

### 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

### Pre-Shipper/Shipper Workbench: Carrier Detail Frame

Pre-Shipper/Shipper Workbench x

Go To Actions Copy Print Preview

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

Ship-To/Dock: 00010006 Customer  
1212 Customer St

Shipping Group:  
Inventory Movement Code:

Carrier: TOL01 Multi:

Ship Via: GROUND

FOB Point:

Mode of Transport:

Carrier Shipment Ref: 00000127

Vehicle ID:

Document Format: 01

Consolidate Ship: optional

Language: us

Merge Other Pre-Shippers:

Comments:

Back Next

Set to Yes if there is more than one carrier

QAD CSS-SH-120

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

## Shipper Workbench Frame

**Pre-Shipper/Shipper Workbench: Shipper Workbench Frame**

The screenshot displays the 'Pre-Shipper/Shipper Workbench' window. At the top, there is a menu bar with 'Go To', 'Actions', 'Copy', 'Print', and 'Preview'. Below the menu bar is a table titled 'Shipper Workbench' with columns: Level, Order, Ln, Item Number, Quantity, UM, Container, and Canc B/D. The table contains one row with Level '0' and Shipper information: 'Shipper: 1000/00000127 Ship-To: 00010006'. A blue arrow points from a callout box '1. Select item' to the '0' in the Level column. Below the table is a detailed view of the selected item, with a blue arrow pointing from a callout box '2. Modify/view item information' to this section. The detailed view includes fields for Sales Order, Line, Order, Site, Loc, Qty Picked, UM, Lot/Serial, Reference, Type, Net Weight, Tare Weight, Gross Weight, Volume, Consume Req, ID, Description, Comments, and Cancel B/D. At the bottom right of the detailed view are buttons for 'Delete', 'Back', and 'Next'. The QAD logo is in the bottom left corner, and 'CSS-SH-130' is in the bottom right corner.

Level	Order	Ln	Item Number	Quantity	UM	Container	Canc B/D
0							

Shipper: 1000/00000127 Ship-To: 00010006

1. Select item

2. Modify/view item information

Sales Order:	Line:	Order:	Site:	Loc:
Quantity: 1.0	UM:			
Qty Picked: 0.0		Lot/Serial:	Reference:	Type:
Net Weight: 0.0		Consume Req: <input type="checkbox"/>	ID:	
Tare Weight: 0.0		Description:	Comments: <input type="checkbox"/>	Cancel B/D: <input type="checkbox"/>
Gross Weight: 0.0				
Volume: 0.0				

Delete Back Next

QAD CSS-SH-130

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

## Display Sequences Frame

**Pre-Shipper/Shipper Workbench: Display Sequences Frame**

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

Display Sequence Detail - Order Quantity: 2 EA

Customer Job: 20090615

Customer Sequence: 001

Customer Reference: 1R001

Customer Dock:

Line Feed:

Date: 6/15/2009 Time: :

Quantity: 1.0 UM: EA

Status: 9000

Customer Build Date:

Volume: 0.0

Comments:

Cancel B/O:

Loc: 100

Type:

ID:

pot. Red

QAD

CSS-SH-140

You can use the Display Sequences frame to:

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

### Deleting Sequences

The Display Sequences frame can be used to delete sequences.

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

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

## Adding Sequences

### Pre-Shipper/Shipper Workbench: Add Sequences Frame

The screenshot shows the 'Pre-Shipper/Shipper Workbench' window with a table of order lines and an 'Add Sequences' dialog box open over it.

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

The 'Add Sequences' dialog box contains the following fields:

- Customer Job: [ ]
- Customer Sequence: [ ]
- Customer Reference: [ ]
- Customer Dock: [ ]
- Line Feed: [ ]
- Date: [ ] Time: [ ]
- Quantity: [ ] UM: [ ]
- Status: [ ]
- Customer Build Date: [ ]
- Volume: 0.0
- Comments:
- Cancel B/O:
- Loc: 100
- Type: [ ]
- ID: [ ]
- pot. Red

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

**Pre-Shipper/Shipper Workbench: Display Sequence Detail Frame**

The screenshot shows the 'Pre-Shipper/Shipper Workbench' application window. At the top, there is a menu bar with 'Go To', 'Actions', 'Copy', 'Print', and 'Preview'. Below the menu is a table with the following data:

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

Below the table, a 'Display Sequence Detail - Order Quantity: 2 EA' frame is open, showing the following fields:

- Customer Job: 20090615
- Customer Sequence: 001
- Customer Reference: 1R001
- Customer Dock: [Empty]
- Line Feed: [Empty]
- Date: 6/15/2009
- Time: [Empty]
- Quantity: 1.0 UM: EA
- Status: 9000
- Customer Build Date: [Empty]

At the bottom of the frame, there are fields for 'Volume: 0.0', 'Comments: [Empty]', and 'Cancel B/O: [Empty]'. The QAD logo is visible in the bottom left corner, and 'CSS-SH-160' is in the bottom right corner.

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

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

## Trailer Information Frame

**Pre-Shipper/Shipper Workbench: Trailer Information Frame**

Pre-Shipper/Shipper Workbench x

Go To Actions Copy Print Preview

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

Ship-To/Dock: 00010006 Customer  
 1212 Customer St


Shipping Group:  
 Inventory Movement Code:

**Trailer Information**

Status:  Trailer Comments:

Cancel Date:

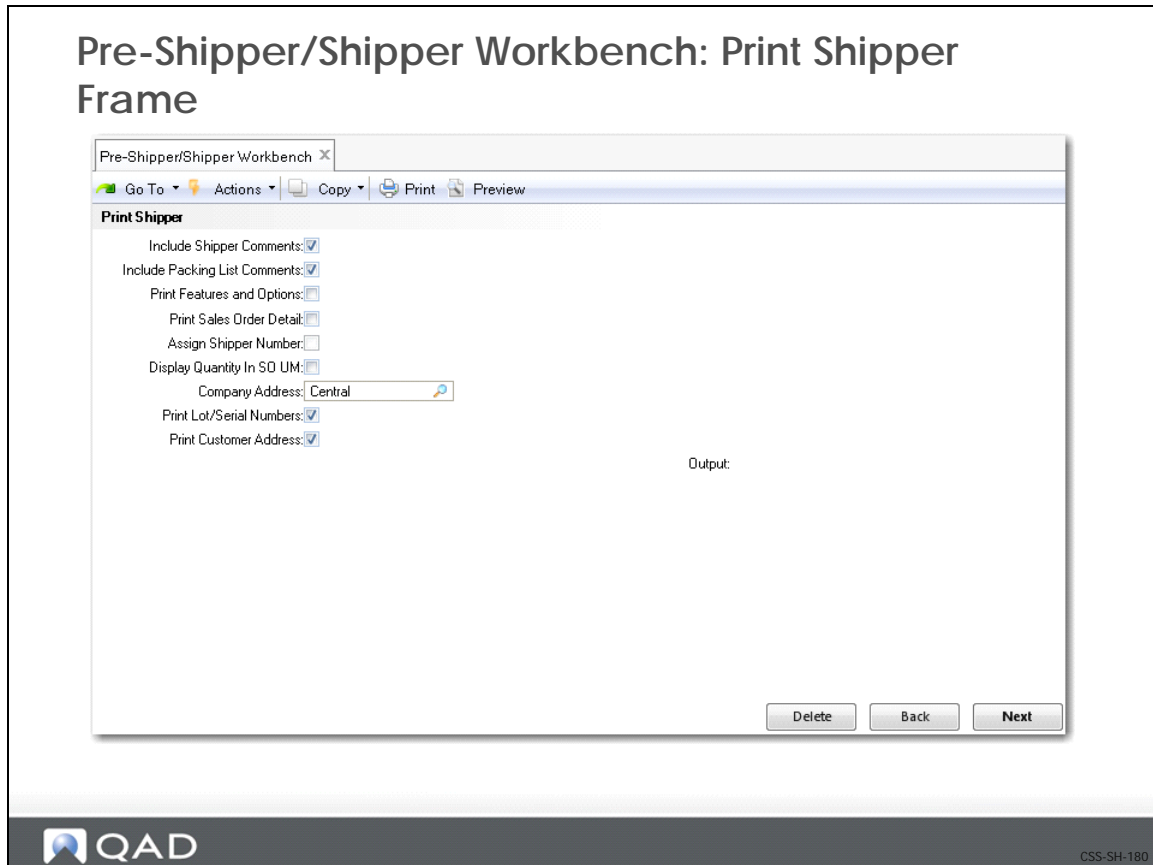
Delete Back Next

 QAD CSS-SH-170

*Status.* Specifies if the shipper is active or cancelled.

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

## Print Shipper Frame



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

## Exercise: Create Daily Pre-Shipper

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

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

Use Sequence Pre-Shipper - Automatic (7.5.4.10).

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

Field	Data
Due Date:	<next Monday>
To:	<next Monday>
Ship-To:	f001
To:	f001
Status:	9000
Auto Allocation:	Yes
Update:	No

- 2 Verify the Pre-Shipper and Sequence Pack List.
- 3 Run again with Update set to Yes to generate pre-shipper.

**Note** If you receive Processing Errors stating: “INVALID SEQUENCE. SEQUENCE HAS INCORRECT DATASET” refer to “Set Up Sequence Numbers” on page 184 to define the correct sequence numbers for pre-shippers and shippers.

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

Use Sequence Schedule Report (7.5.4.7)

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

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

Use Sequence Schedule Maintenance (7.5.4.5)

Field	Data
Ship-From:	10-200
Ship-To:	f001
Release ID:	1

- 7 Verify all sequences picked cannot be edited.

## Exercise: Change Status to Offline

You receive notification from Namaka. 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. Namaka will notify you at that time.

Use Pre-Shipper/Shipper Workbench (7.9.2)

- 1 To edit the pre-shipper enter:

Field	Data
Ship-From:	10-200
Pre-Shipper/Shipper:	Pre-Shipper
Number:	<pre-shipper #>
Ship-To /Dock:	f001

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

Use Sequence Schedule Maintenance (7.5.4.5)

Field	Data
Ship-From:	10-200
Ship-To:	f001
Release ID:	001

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

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

## Exercise: Change Status and Shipping Date

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

Use Pre-Shipper/Shipper Workbench (7.9.2)

- 1 Delete the pre-shipper by entering:

Use Pre-Shipper/Shipper Workbench (7.9.2)

Field	Data
Ship-From:	10-200
Pre-Shipper/Shipper:	Pre-Shipper
Number:	<pre-shipper #>

- 2 Advance to the Shipper Workbench. From the Actions menu, select Delete. An options frame displays.
- 3 Select 1 - Delete Pre-Shipper/Shipper.
- 4 Edit the sequence and mark it offline by entering:

Use Sequence Schedule Maintenance (7.5.4.5)

Field	Data
Ship-From:	10-200
Ship-To:	f001
Release ID:	1

- 5 Advance to the Sequence Detail Data frame and enter.

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

- 6 Set the next sequence offline by entering:

Field	Data
Customer Reference:	1R011
Status:	offline

- 7 Create pre-shipper for the day:

Use Sequence Pre-Shipper - Automatic (7.5.4.10).

Field	Data
Due Date:	<next Monday>
To:	<next Monday>
Ship-To:	f001
To:	f001
Status:	9000
Auto Allocation:	Yes
Update:	Yes

- 8 Verify the Pre-Shipper and Sequence Pack List.
- 9 Verify the offline sequences are NOT included.

Write pre-shipper number here: \_\_\_\_\_

## Exercise: Print Pre-Shipper

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

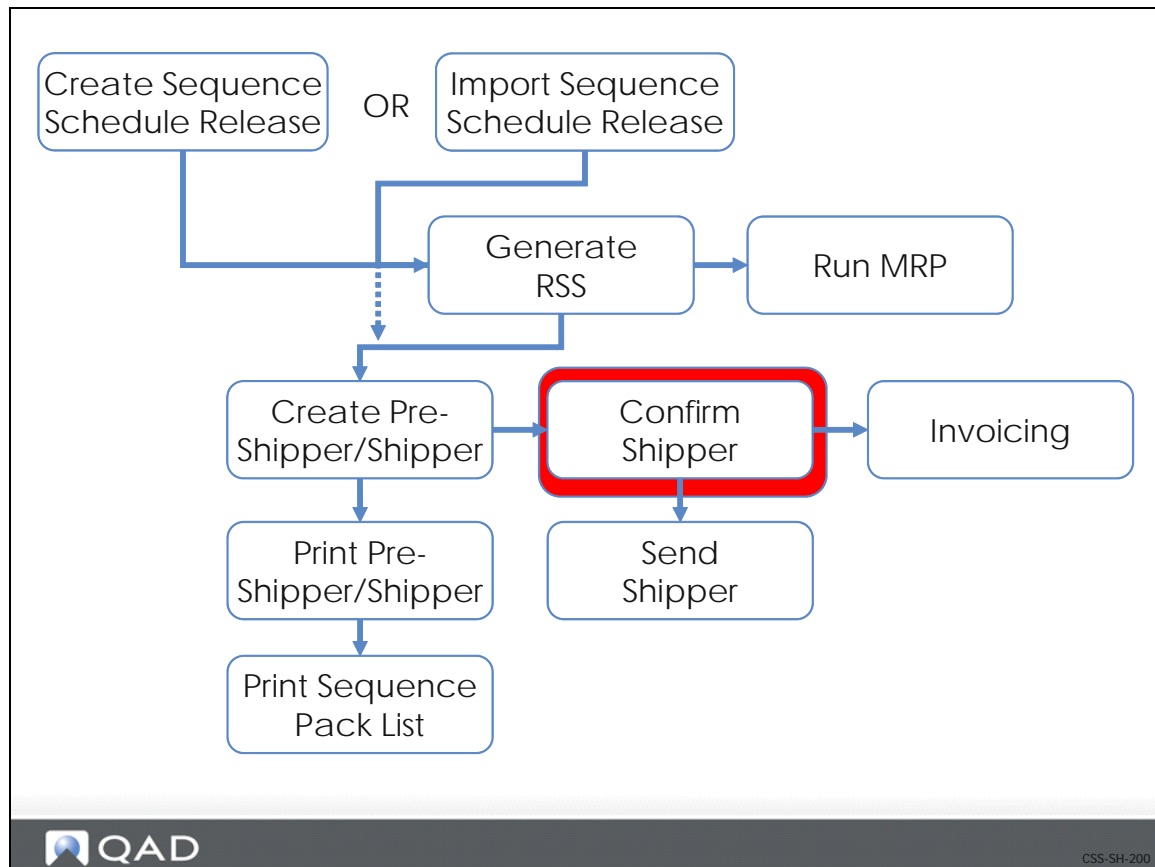
Use Pre-Shipper/Shipper Print (7.9.4), direct output to Page.

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

- 2 Verify the shipper contains the range of sequences.

Write shipper number here: \_\_\_\_\_

## Confirm Shipper



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

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

## Confirm Shipper

### Shipping QCS



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

## Pre-Shipper/Shipper Confirm (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

## Pre Shipper/Shipper Confirm: Invoice Options

### Pre-Shipper/Shipper Confirm: Invoice Options

Pre-Shipper/Shipper Confirm

Go To Actions Copy Print Preview Attach

Ship-From ID: 10-200 Number: PS1012100003

Ship-From ID: 10-200 Automotive Mfg  
Pre-Shipper/Shipper: Pre-Shipper  
Number: PS1012100003

Ship-To/Dock: f001 Namaka Motor Company

Ship Date: 10/12/2010  
Effective Date: 10/12/2010

Document:


Post Invoice:

Print Invoice:

Daybook Set: 10-SALES

Consolidate Invoices:

Calculate Freight:

CSS-SH-230

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

## Pre-Shipper/Shipper Confirm: Print Options

### Pre-Shipper/Shipper Confirm: Print Options

Pre-Shipper/Shipper Confirm X

Go To ▾ Actions ▾ Copy ▾ Print ▾ Preview ▾ Attach

Ship-From ID:10-200
Number:PS1012100003
Entity Address:10-100

Print Only Lines to Invoice: 
Invoice Date: 10/12/2010

Print Lot/Serial Numbers Shipped:

Print Features and Options:

Entity Address: 10-100
Form Code: 1

Message:

Print Heading:

Print Header Comment:

Print Line Comment:


Print Line Tax%:

Print Description 2:

Print Customer Item:

Output:

Back Next


CSS-SH-240

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

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

## Exercise: Confirm the Shipper

Use Pre-Shipper/Shipper Confirm (7.9.5)

- 1 Confirm the shipper by entering:

Field	Data
Ship-From:	10-200
Pre-Shipper/Shipper:	Shipper
Number:	<shipper #>

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

Field	Data
Post Invoice:	Yes

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

Write invoice number here: \_\_\_\_\_

## Exercise: Change Status

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

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

Use Sequence Pre-Shipper - Automatic (7.5.4.10)

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

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

Write pre-shipper number here: \_\_\_\_\_

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

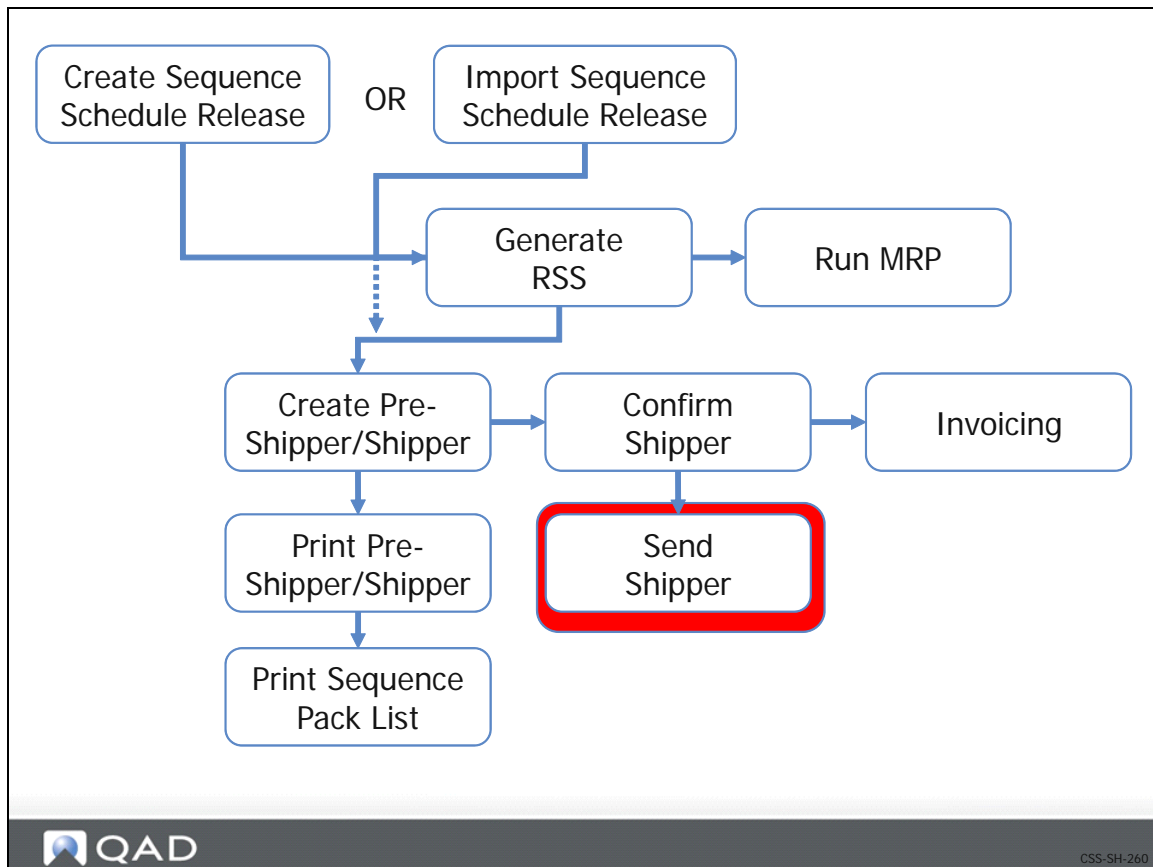
Use Pre-Shipper/Shipper Workbench (7.9.2)

Field	Data
Ship-From:	10-200
Pre-Shipper/Shipper:	Pre-Shipper
Number:	<pre-shipper #>

Write pre-shipper number here: \_\_\_\_\_

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

## Send Shipper



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

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

## Send Shipper

### Shipping QCS



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

## Pre-Shipper/Shipper Print (7.9.4)


### Pre-Shipper/Shipper Print

Pre-Shipper/Shipper Print X
Go To Actions Copy Print Preview

Ship-From: <input type="text"/>	To: <input type="text"/>
Ship-To/Dock: <input type="text"/>	To: <input type="text"/>
Number: <input type="text"/>	To: <input type="text"/>
Inventory Movement Code: <input type="text"/>	To: <input type="text"/>
Document Format: <input type="text"/>	To: <input type="text"/>
Language: <input type="text"/>	To: <input type="text"/>
Address List Type: <input type="text"/>	To: <input type="text"/>
Carrier: <input type="text"/>	To: <input type="text"/>

Print Pre-Shippers/Shipper: Pre-Shipper

<input type="checkbox"/> Include Printed Pre-Shippers/Shipper <input type="checkbox"/> Print Features and Options <input checked="" type="checkbox"/> Assign Shipper Numbers <input type="text"/> Shipper Sequence ID <input checked="" type="checkbox"/> Include Pre-Shipper/Shipper Comments <input checked="" type="checkbox"/> Include Sales Order Packing List Comments <input type="checkbox"/> Print Sales Order Detail <input type="checkbox"/> Display Quantity In SD UM	<input type="text"/> Company Address: Central <input type="checkbox"/> Print Lot/Serial Numbers <input checked="" type="checkbox"/> Print Customer Address  Output: Batch ID:
--	--


CSS-SH-280

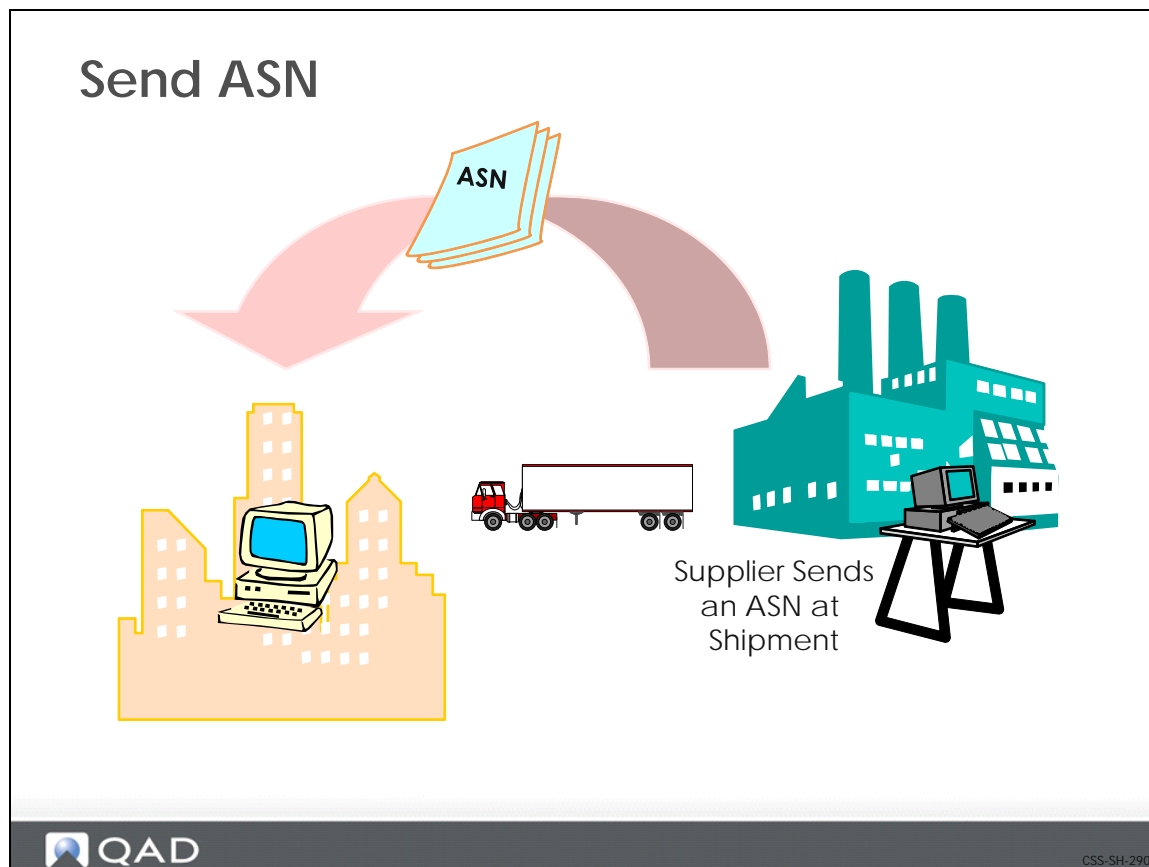
Use Pre-Shipper/Shipper Print to create and print a shipper record.

- Prints separate packing list
  - Can include sequence numbers

The system updates:

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

## Send ASN



An ASN is an electronic document derived from the shipper document and electronically sent (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 (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. Export an ASN using EDI eCommerce, Shipment ASN Export (35.4.1).

**Note** Whether or not an ASN is electronically transmitted using EDI to the customer depends on the setting of the EDI ASN field in Trading Partner Parameters Maintenance (35.13.10). If Yes, then the ASN can be transmitted by EDI.

## Shipment ASN Export (35.4.1)

### Shipment ASN Export

Shipment ASN Export
Go To Actions Copy Print Preview

BOL: <input type="text"/>	To: <input type="text"/>
Shipper: <input type="text" value="00000127"/>	To: <input type="text" value="00000127"/>
Ship-From: <input type="text" value="1000"/>	To: <input type="text" value="1000"/>
Ship-To/Dock: <input type="text"/>	To: <input type="text"/>
Inventory Movement Code: <input type="text"/>	To: <input type="text"/>
Ship Date: <input type="text"/>	To: <input type="text"/>

Include Confirmed Shippers Only  
 Print Details  
 Update/Export/Both:  Export  
 Print Fail/Pass/Both:  Failed  
 EDI Batch Number:   
 Show Warning Messages

Output:  
 Batch ID:

CSS-SH-310

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

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

## Sequence Shipper Report (7.5.4.11)

### Sequence Shipper Report

Sequence Shipper Report
Go To Actions Copy Print Preview

Ship-From: <input type="text"/>	To: <input type="text"/>
Ship-To: <input type="text"/>	To: <input type="text"/>
Pre-Shipper/Shipper: <input type="text"/>	To: <input type="text"/>
Item Number: <input type="text"/>	To: <input type="text"/>
Customer Job: <input type="text"/>	To: <input type="text"/>
Customer Sequence: <input type="text"/>	To: <input type="text"/>
Customer Reference: <input type="text"/>	To: <input type="text"/>
Ship/Delivery Date: <input type="text"/> :	To: <input type="text"/> :
Status: <input type="text"/>	To: <input type="text"/>
Sales Order: <input type="text"/>	To: <input type="text"/>

Pre-Shipper/Shipper:  Pre-Shipper

Confirmed:

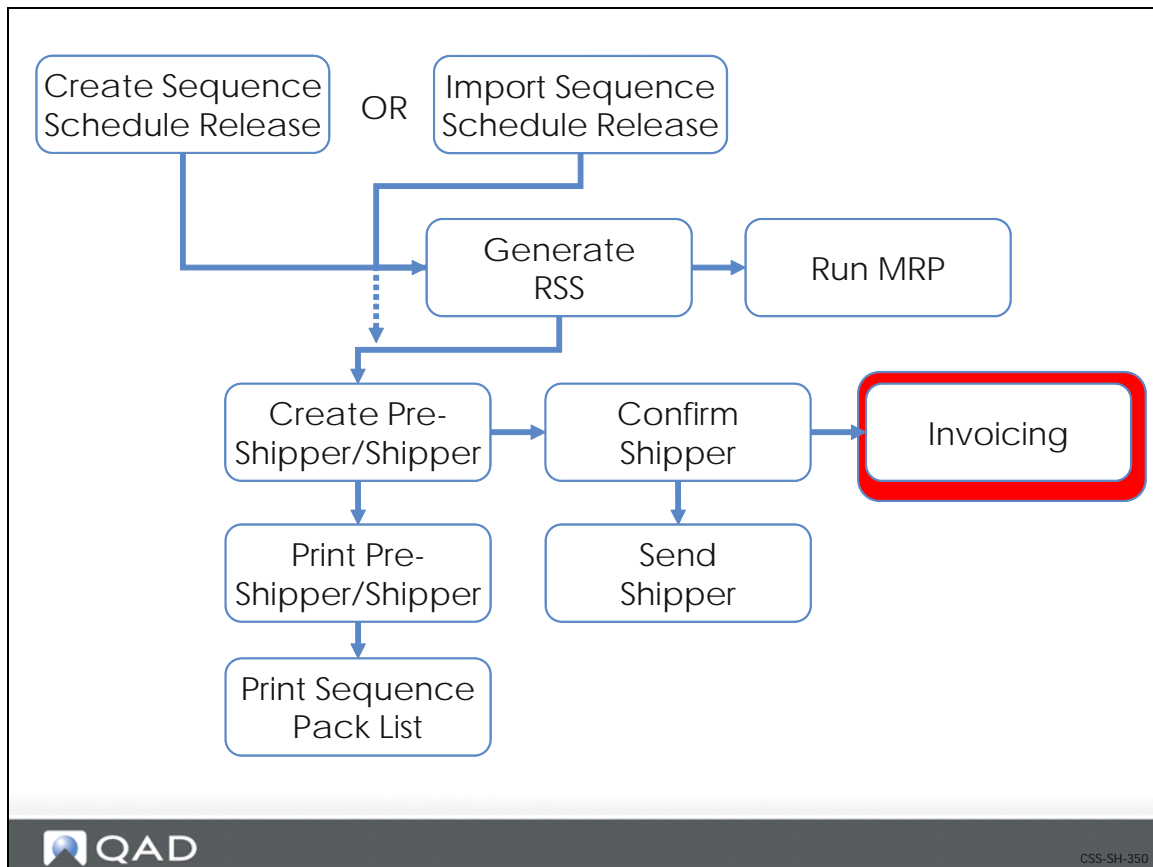
Output:  
Batch ID:

CSS-SH-330

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

- Allows you to see the shipper's contents

## Invoicing



Confirming the shipper marks the order as ready for invoicing.

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

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

## Invoicing

### Shipping QCS



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

## Invoicing Procedure

### Invoicing Procedure

- Post Invoice
- Print Invoice
- Export Invoice



CSS-SH-370

The typical scenario for invoicing is:

- Post invoice
  - Automatically at the time of confirmation
  - Manually using Invoice Post and Print (7.13.4)
- Print invoice
  - At the time of confirmation
  - Manually, either during post or later using Invoice Print or Reprint (7.13.12)
- Send invoice
  - Export
  - Manually

## Shipping QCS Summary

### Shipping QCS Summary



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

Chapter 7

# Features and Options

## QCS Features and Options

In this section you learn how to use:

- Identify key business considerations before setting up QCS in QAD Enterprise Applications
- Set up QCS in QAD Enterprise Applications
- Loading QCS in QAD Enterprise Applications
- Planning QCS in QAD Enterprise Applications
- Shipping QCS in QAD Enterprise Applications
- **QCS Features and Options**



CSS-FE-010

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

## Multi-Item Sequences

### Features and Options

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



CSS-FE-020

QCS allows you to have multi-item sequences. Multi-item sequences simply means there is more than one item per sequence.

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

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

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

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

## Multiple Delivery Locations

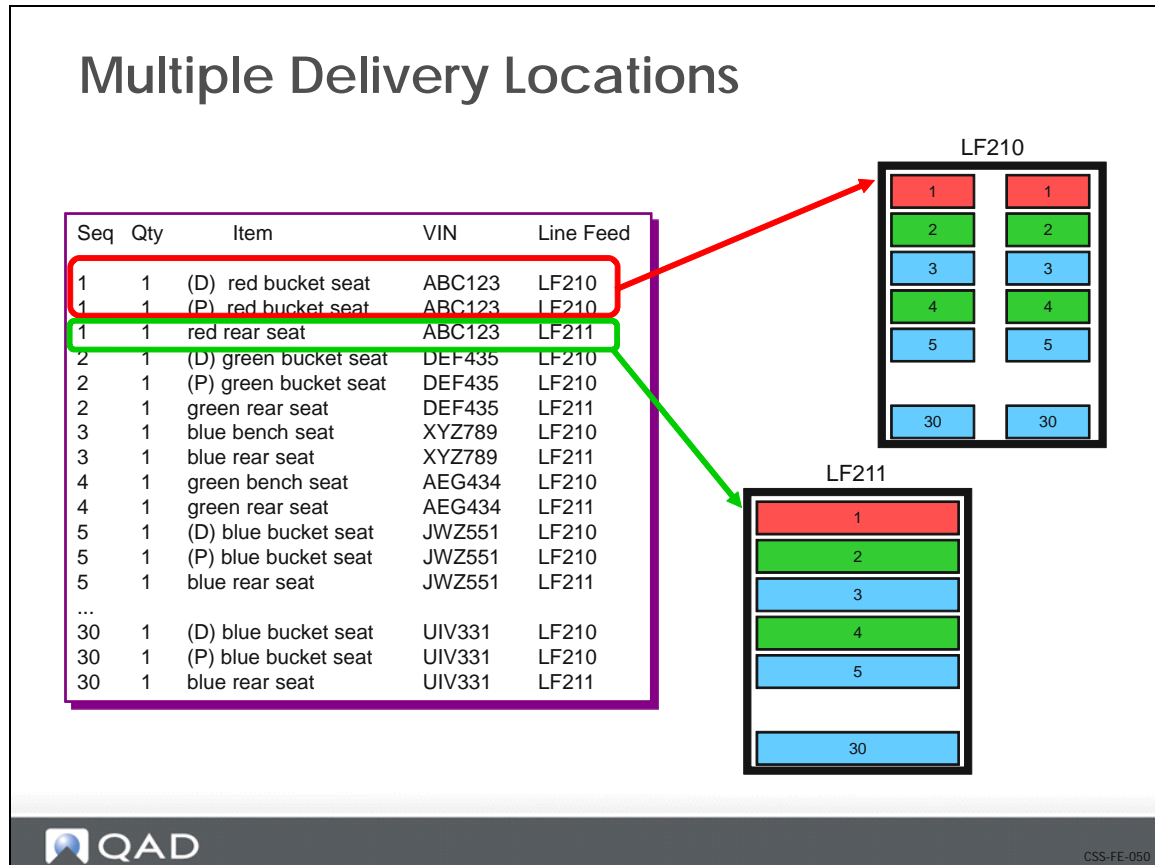
### Features and Options

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



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 (dock address) specified on the scheduled order in Customer Scheduled Order Maintenance (7.3.13). The dock address specified on the scheduled order is set up in Dock Maintenance (7.3.6). Then on the pre-shipper/shipper, that dock address is used as the ship-to address. The entire scheduled order is shipped to that dock address.

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

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

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

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

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

**Note** In QCS these delivery locations (dock and line feed) are strictly customer internal locations. QAD Enterprise Applications 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

### Features and Options

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



CSS-FE-060

QAD Enterprise Applications gives you two options for deleting sequences:

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

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

- Use Schedule Delete/Archive (7.9.23)

## Sequence Schedule Maintenance (7.5.4.5)

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

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

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

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

## Sequence Schedule Detail Delete (7.5.4.22)


### Sequence Schedule Detail Delete

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

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

Include Deleted Only  
 Update

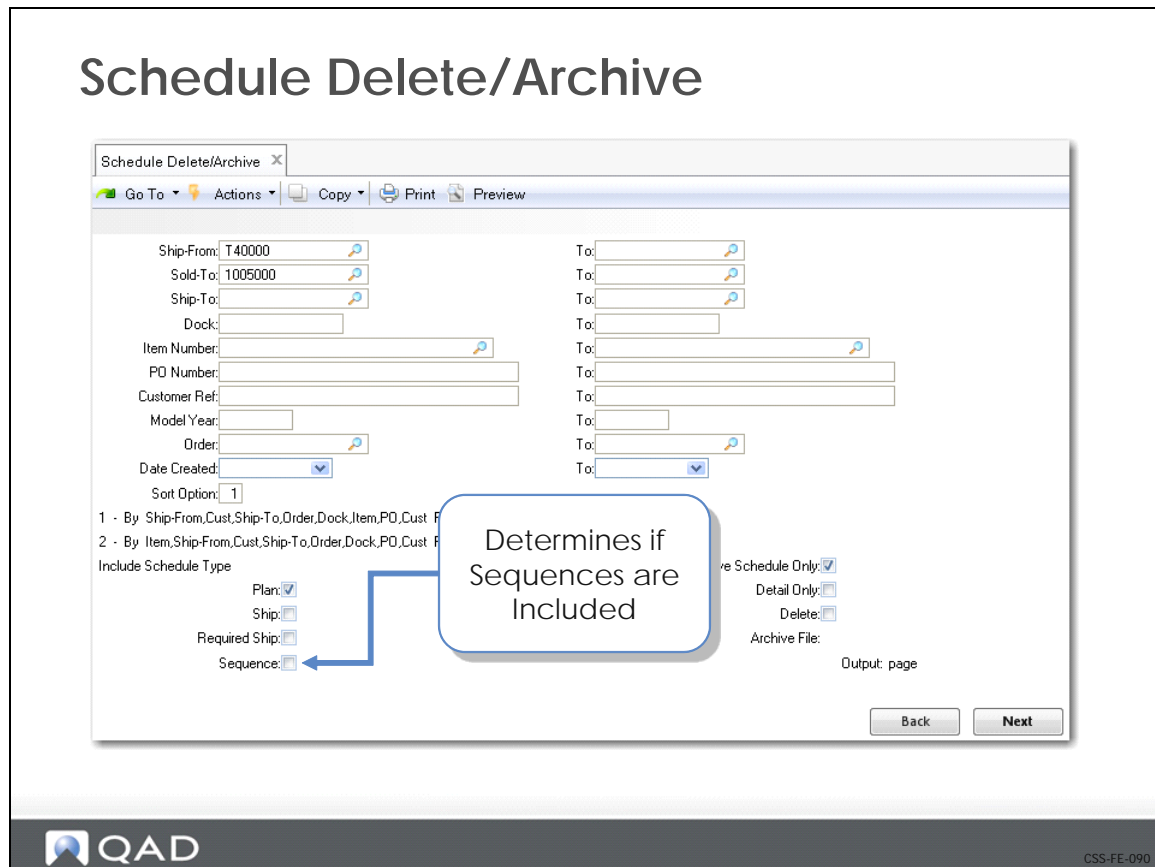
Output: page  
 Batch ID:


CSS-FE-080

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

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

## Schedule Delete/Archive (7.5.23)



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

### Features and Options

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



CSS-FE-100

You use sequence cross references to handle duplicate sequence requirements.

- Same sequence is on separate schedule releases

For example:

Day 1

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

Day 2

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

## Sequence Schedule Maintenance (7.5.4.5)

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

## Sequence Cross-Ref Maintenance (7.5.4.13)

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

Cross-referenced sequences can be:

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

There are three frames:

- Header Frame
- Picked/Shipped Sequence
- Linked Sequence

**Header Frame**

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

**Picked/Shipped Sequence Frame**

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

## Linked Sequence Frame

### Sequence Cross-Ref Maintenance: Linked Sequence Frame

Sequence Cross-Ref Maintena... X

Go To Actions Copy Print Preview

Ship-From: 10000 Ship-To: f001

Picked/Shipped Sequence

Shipped Release ID:  🔍

Shipped Job:

Shipped Sequence:

Shipped Item Number:


Shipped Reference:

Shipped Dock:

Shipped Line Feed:

Scheduled Date:  Scheduled Time:

Picked:  Shipped:  Shipper ID:


CSS-FE-130

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

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

## Sequence Cross-Ref Report

Sequence Cross-Ref Report

Go To Actions Copy Print Preview

Ship-From: T40000 To:

Ship-To: 1005000 To:

Release ID: To:

Customer Job: To:

Customer Sequence: To:

Item Number: To:

Customer Reference: To:

Customer Dock: To:

Line Feed: To:

Date: To:

Output:  
Batch ID:

Back Next

QAD CSS-FE-140

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

- Manually
- Automatically when sequences are imported using:
  - eCommerce
  - Shipper Gateway

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


## Sequence Cross-Ref Report: Sample Report

# Sequence Cross-Ref Report: Sample Report

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

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-150

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

## Cumulative Quantities

### Features and Options

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



CSS-FE-160

Cumulative (cum) sequence schedules are rare.

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

## Sequence Schedule Maintenance (7.5.4.5)

The screenshot displays two overlapping windows from the QAD software. The background window is titled 'Sequence Schedule Maintena...' and shows fields for 'Ship-From: T12000 Electronics Division', 'Ship-To: 01000000 Colossal Conglomerates LTD', and 'Release ID:'. In the 'Create Date:' section, the 'Cumulative:' checkbox is checked. Other options include 'Packing Order: Reverse', 'Sequences Per Container:', 'Check Sequence Tolerance:', 'Maximum Tolerance:', 'Schedule Date Type: Delivery', 'Active Start:', and 'Active End:'. A blue callout box labeled 'Cum Quantity Indicator' points to the checked 'Cumulative' checkbox. The foreground window is titled 'Sequence Schedule Maintena...' and shows 'Sequence Detail Data'. It includes fields for 'Date: 6/15/2009', 'Time:', 'Customer Job: 20090615', 'Customer Sequence: 001', 'Order: so100', 'Line: 1', 'Unit of Measure: EA', 'Item Number: Part 1', 'Sunroof, Red', 'PO Number:', 'Line Item Customer Ref:', 'Model Year:', 'Customer Reference: 1R001', 'Customer Dock:', 'Line Feed:', 'Quantity: 1.0000000000', 'Customer Item: Sunroof, Red', 'Customer Build Date:', 'Status: 9000', and 'Delete:'. A blue callout box labeled 'Cum Quantity' points to the 'Cum Quantity: 0.0' field.

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

Appendix A

# Reference

*Manually Create Sequence Schedule* 182

*Set Up Sequence Numbers* 184

## Manually Create Sequence Schedule

### SUV Assembly Plant

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

Field	Data
Ship-From:	10-200
Ship-To:	f001
Release ID:	001

- 2 Advance to the next frame and enter:

Field	Data
Cumulative:	No
Schedule Date Type:	Ship

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

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

**Note** Use Status 9000 for all sequences.

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

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

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

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

## Print Sequence Schedule Report

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

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

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

## Set Up Sequence Numbers

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

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

Use Number Range Management (36.2.21.1)

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

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

- 3 Add a second segment number by entering:

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

- 4 Add a new sequence number code by entering:

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

- 5 Advance to the Segment List frame and enter:

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

- 6 Add a second segment number by entering:

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

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

- 7 Add a new sequence number code by entering:

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

- 8 Advance to the Segment List frame and enter:

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

- 9 Add a second segment number by entering:

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

- 10 Update Container/Shipper Control (7.9.24) to use the new sequence number codes.

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



Appendix B

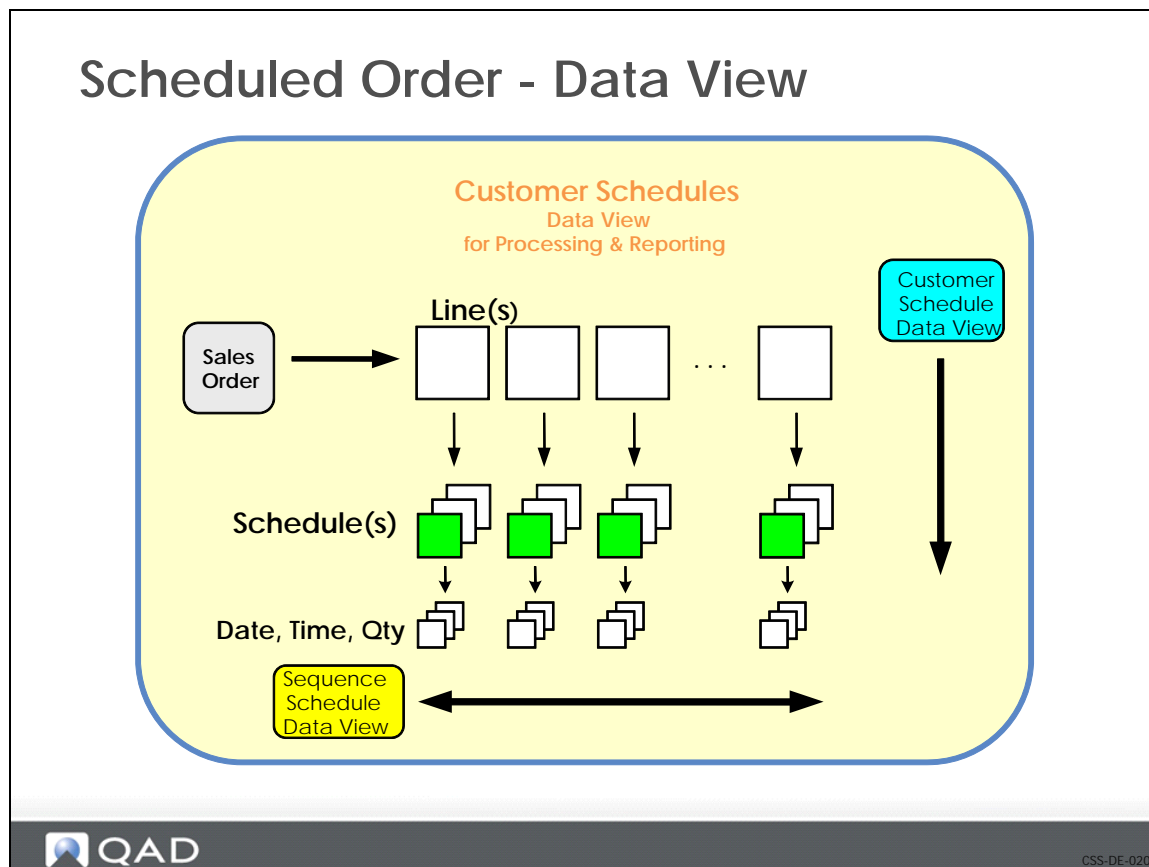
# **Design and Architecture**

## Design Considerations

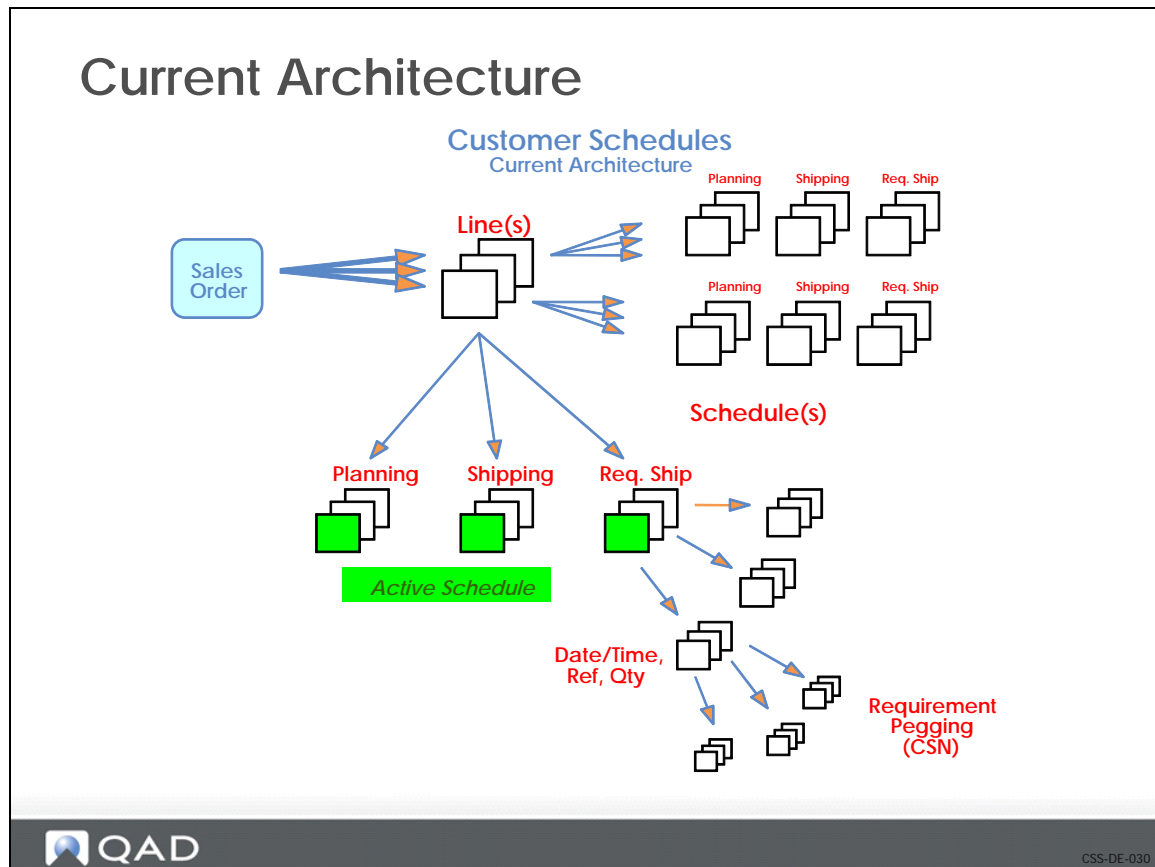
### Design and Architecture

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

## Scheduled Order - Data View



## Current Architecture



## New Schedule Type

### New Schedule Type

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



CSS-DE-040

Existing schedule types:

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

### Design Alternative

New Type 7

- Creates gap between schedule types

New Type 4

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

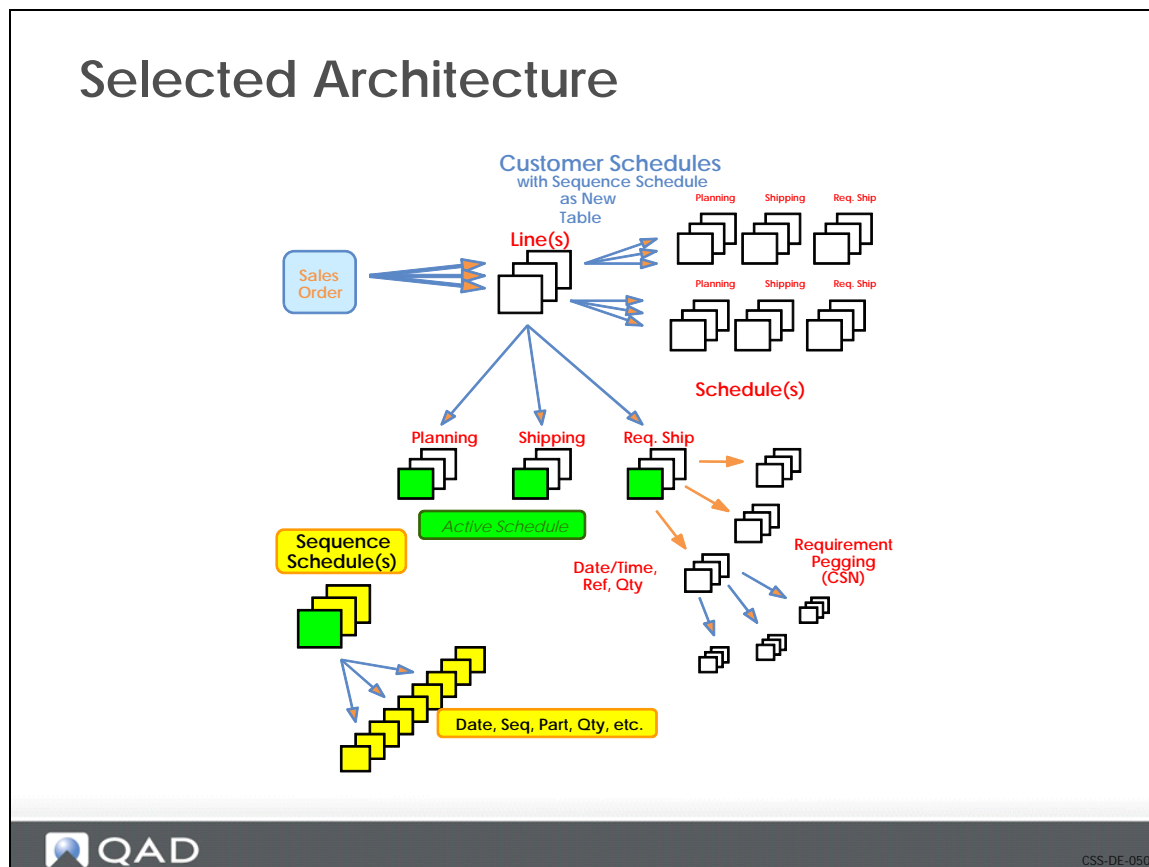
New Data Structure

Design Requirements

Physical requirements:

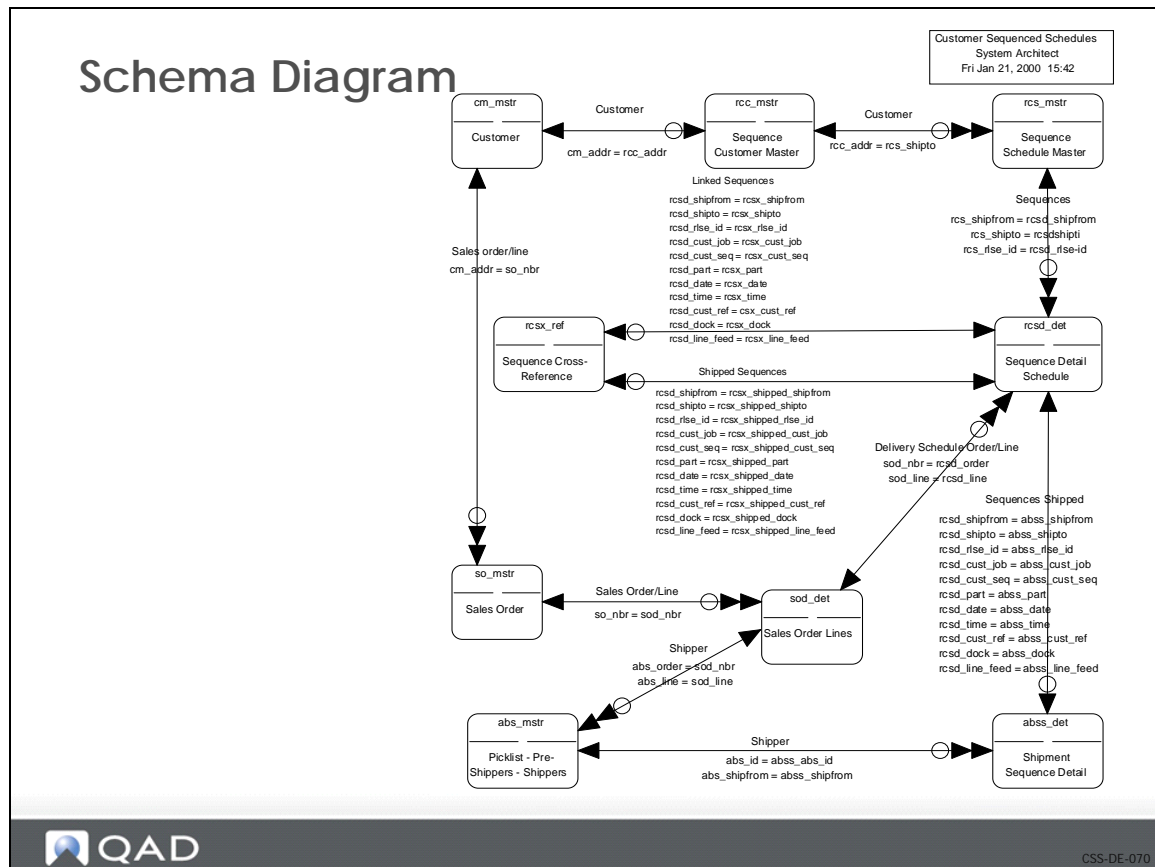
- New fields
  - Job
  - Sequence
  - Dock
  - Line Feed
- New indexes
  - By date/sequence for maintenance
  - By date/item for planning (required ship schedule [RSS])
  - By date/destination/sequence for shipping

## Selected Architecture





Schema Diagram



CSS-DE-070



## Programming Considerations

### Design and Architecture

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



CSS-DE-080

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

#### Required Ship Schedule Update

#### Netting Logic

- Keep existing 1–4 options

#### New Workfile Created

- Contains sequence schedule requirements

#### RSS Begins with Sequence Schedule

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

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

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

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

## Required Ship Schedule Update

### Required Ship Schedule Update

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



CSS-DE-090

#### Netting Logic

- Keep existing 1–4 options

#### New Workfile Created

- Contains sequence schedule requirements

#### RSS Begins with Sequence Schedule

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

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

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

## Picklist/Pre-Shipper- Automatic

### Picklist/Pre-Shipper - Automatic

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



CSS-DE-100

Handles sequenced and non-sequenced items:

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

Reads sequence schedule:

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

Recalculates pre-shipper quantity:

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

## eCommerce

### eCommerce

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

# Product Information Resources

QAD offers a number of online resources to help you get more information about using QAD products.

[QAD Forums \(community.qad.com\)](http://community.qad.com)

Ask questions and share information with other members of the user community, including QAD experts.

[QAD Knowledgebase \(knowledgebase.qad.com\)\\*](http://knowledgebase.qad.com)

Search for answers, tips, or solutions related to any QAD product or topic.

[QAD Document Library \(www.qad.com/documentlibrary\)](http://www.qad.com/documentlibrary)

Get browser-based access to user guides, release notes, training guides, and so on; use powerful search features to find the document you want, then read online, or download and print PDF.

[QAD Learning Center \(learning.qad.com\)\\*](http://learning.qad.com)

Visit QAD's one-stop destination for all courses and training materials.

\*Log-in required

