



## **QAD Supplier Portal: Supplier Schedules**

## Course Overview

- Summarizes supplier schedules as a general concept
- Introduces the Schedule views and its features
- Lists important Schedules view columns
- Introduces the Schedule Replenishment views
- Exercise on schedules in the context of QAD Supplier Portal

This course starts with an overview of supplier schedules as a general concept. We will then move to talk about the Schedules view in QAD Supplier Portal and its most important columns. Finally, we will complete an exercise on supplier schedules in the context of QAD Supplier Portal.

## Supplier Schedules

- Cumulative, schedule-driven POs
- Used by companies with long-term supplier contracts with weekly or daily deliveries
  - For example, in the automotive industry
- Schedules specify delivery dates

Supplier schedules are period-oriented schedules that are generated on a daily, weekly, or monthly basis. Schedules contain the basic data for ASNs, receipts, and invoices.

Supplier schedules are cumulative, schedule-driven purchase orders with multiple line items from which releases of requirements and due dates are issued. They are typically used by companies with long-term supplier contracts that require regular weekly or daily deliveries. The schedules specify, for the near term, dates and even hours of deliveries. Schedules also inform MRP and the supplier about long-term plans, and are used extensively in the automotive industry.

## Supplier Schedules — Continued

- Customers can use the Schedules views to indicate forecasted requirements
- Schedules can reduce or eliminate EDI costs
- Schedules in Supplier Portal originate in QAD ERP P

It is important to note that, even when using another replenishment strategy, customers often use the Schedule views to indicate forecasted requirements. In these cases, the supplier then uses the Schedules screen to view forecasts for planning purposes.

For schedule-driven replenishment operations, QAD Supplier Portal offers customers and suppliers a potential saving on EDI costs. If a supplier does not have EDI, all required date is available in the Schedules view. Suppliers can see current required shipment releases, together with projections of future requirements, all on one screen. With just a mouse-click, a supplier can download the entire schedule into a spreadsheet – a format they can easily input into their planning system.

The schedules displayed in the view originate from QAD ERP or from another ERP product. If you are using QAD ERP, a poller automatically transfers data between QAD ERP and QAD Supplier Portal.

## Schedule Views

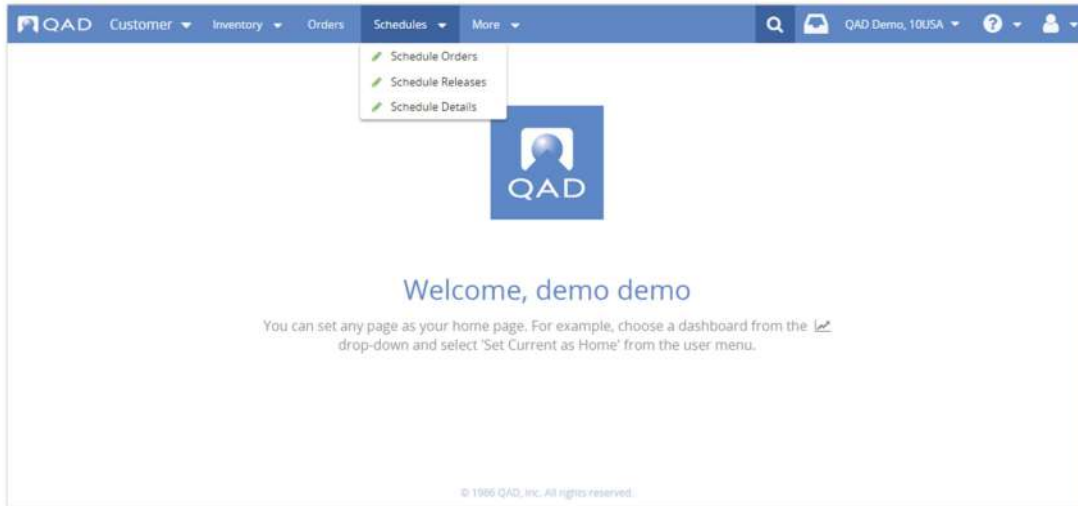
Six views contain schedule information:

- Schedule Detail
- Schedule Orders
- Schedule Releases
- Schedule Replenishment All
- Schedule Replenishment Firm
- Schedule Replenishment Planned

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## Accessing the Schedules Views



To open the Schedules (Orders) views, open the Schedules menu. There are three Schedule views for orders:

- Schedule Detail
- Schedule Orders
- Schedule Releases

# Supplier Portal — Supplier Schedules

## Schedule Orders View

Order #	Line #	Supplier Name	Ship-To	Site	In-Transit Quantity	Cum Start	Buyer
AS001	1	Bridgeville Industries	10-200	10-200		5/23/2016	
MR010	1	Eldon Motor Company	10-200	10-200		1/29/2016	
MR011	1	HTZ Switch Company	10-200	10-200		1/29/2016	
MR011	2	HTZ Switch Company	10-200	10-200		1/29/2016	
MR012	1	HTZ Switch Company	10-200	10-200		1/29/2016	
MR013	1	J&P Metalware Indust...	10-100	10-200		1/29/2016	
MR013	2	J&P Metalware Indust...	10-100	10-200		1/29/2016	
MR014	2	Eldon Motor Company	10-200	10-200		10/11/2017	
SSBWS1	1	Bridgeville Industries	10-202	10-202		10/12/2010	3-02

The Schedule Orders view displays supplier schedule data at order level.

## Schedule Releases View

Release #	Release Status	Order #	Line #	Supplier Name	Schedule Type	Ship-To	Item	Site
20190514-001	●	AS001	1	Bridgeville Industries	Planning	10-200	62201	10-
20190514-001	●	MR010	1	Eldon Motor Company	Shipping	10-200	62201	10-
20190514-001	●	MR010	1	Eldon Motor Company	Planning	10-200	62201	10-
20190514-001	●	MR011	2	HTZ Switch Company	Planning	10-200	62510	10-
20190514-001	●	MR012	1	HTZ Switch Company	Planning	10-200	62520	10-
20190514-001	●	MR013	1	J&P Metalware Indust...	Planning	10-100	62202	10-
20190514-001	●	MR013	2	J&P Metalware Indust...	Planning	10-100	62203	10-
20190514-001	●	MR014	2	Eldon Motor Company	Planning	10-200	02210	10-
20190514-001	●	SSBWS1	1	Bridgeville Industries	Planning	10-202	63001	10-

The Schedule Releases view displays supplier schedule data at release level.



## Supplier Portal — Supplier Schedules

# Schedule Details View

Release #	Release Status	Order #	Line #	Supplier Name	Schedule Type	Ship-To	Item	Site	Reference
20190514-001	●	SSBW51	1	Bridgeville Industries	Planning	10-202	63001	10-202	
20190514-001	●	SSBW52	1	Henderson Industrial	Planning	10-202	62301	10-202	
20190514-001	●	MR010	1	Eidon Motor Company	Planning	10-200	62201	10-200	
20190514-001	●	MR010	1	Eidon Motor Company	Planning	10-200	62201	10-200	
20190514-001	●	MR010	1	Eidon Motor Company	Planning	10-200	62201	10-200	
20190514-001	●	MR011	2	HTZ Switch Company	Planning	10-200	62510	10-200	
20190514-001	●	MR012	1	HTZ Switch Company	Planning	10-200	62520	10-200	
20190514-001	●	MR013	1	J&P Metalware Indust...	Planning	10-100	62202	10-200	
20190514-001	●	MR013	2	J&P Metalware Indust...	Planning	10-100	62203	10-200	

The main Schedule Details screen displays the customer's releases, along with all relevant details. The screen includes an option that lets you create an ASN against a schedule. On the right, drill-downs open more details. Color-coding advises you of firm orders (vs planned orders) and quantities that are past due.

Even when using another replenishment strategy, customers often use the Schedules view to indicate forecasted requirements.

It is interesting to note that every line you see on the Schedules screen provides all the information related to a schedule. This means that the lines include the Schedule Order (contract) information plus the Schedule Release information and all the details related to dates.

Finally, the In-Transit column contains the in-transit quantities for each release (that is, the item-place), providing you with comprehensive information to better control your supply chain.

## Schedule Details View, Visual Indicators

Schedule Details Default View Open More

Release Status = "Active" Search

Release #	Release Status	Order #	Line #	Supplier Name	Quantity Required	Schedule Type	Net Required Quantity	Ship-To
20190514-001	●	SSBW52	1	Henderson Industrial		Planning	0.0	10-202
20190514-001	●	MR010	1	Eidon Motor Company	0.0	Planning	0.0	10-200
20190514-001	●	MR010	1	Eidon Motor Company	200.0	Planning	200.0	10-200
20190514-001	●	MR010	1	Eidon Motor Company	180.0	Planning	180.0	10-200
20190514-001	●	MR011	2	HTZ Switch Company	0.0	Planning	0.0	10-200
20190514-001	●	MR012	1	HTZ Switch Company	0.0	Planning	0.0	10-200
20190514-001	●	MR013	1	J&P Metalware Indust...	50.0	Planning	50.0	10-100
20190514-001	●	MR013	2	J&P Metalware Indust...	0.0	Planning	0.0	10-100
20190514-001	●	MR014	2	Eidon Motor Company	0.0	Planning	0.0	10-200

Icons show the release status

- Active ●
- Inactive ●

A green cell indicates Firm required quantities

The **Schedule** views include visual indicators to highlight fields that require particular attention.

The **Release Status** column displays different icons, depending on the status of the line. A blank green circle indicates that the line is active. A grey circle with an X indicates that the line is inactive.

In the **Quantity Required** field, a green cell indicates Firm required quantities.

In the **Prior Net Required Quantity** and **Net Required Quantity** fields, a red cell indicates that Prior Net Req Qty or Net Required Quantity is greater than zero, indicating that items are missing.

## Schedules Detailed View

Release: 3535 Order / Line: SCH\_DV1 1

Main - Release Line Detail

**Main**

Customer: JynsDentia (SD2905) Site: 10-100  
Supplier: 10-300 QM-USA Division UM: EA  
Item: 02001 Automotive Connector

**Release**

Release Status: Active Active Start: 5/4/2016  
Prior Cum Quantity: 310 Active End:  
Prior Cum Date: 5/4/2016 Raw Material Quantity S:  
Authorized Raw Material: 0.00 Raw Material Quantity E:  
Authorized Fabrication: 0.00 Fabrication Quantity S:  
Fabrication Quantity E:

**Release Line Detail**

Quantity Required: 23.00 Ship Date: 5/4/2016  
Cum Quantity: 467.00 Delivery Date: 5/5/2016  
Net Required Quantity: 23.00 Interval:  
Reference: 1st Quantity Qualifier: #

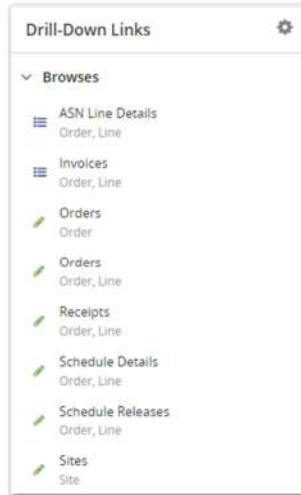
Accessed by double-clicking a schedule line

Detailed data, organized by panels

In a form, view more detailed data grouped by panels. The form displays when you double-click on a row (a record) in an editable view grid. A form includes a summary panel, navigation bar, main panel, and then various detail panels and sub-panels.

A release is a set of item quantities and requirement dates identified by a release ID number, which is then sent to your supplier.

## Schedule Views, Drill-Down Links



The Schedule views in QAD Supplier Portal include many useful drill-down links. By selecting the drill-down view you want and then clicking on the Link icon located on the right of the view, you can quickly access browses related to data in the currently selected record.

## Schedules View, Creating ASNs

The screenshot shows the QAD Supplier Portal interface. At the top, there are navigation tabs: Supplier, Inventory, Orders, Schedules, and ASNs. The 'Schedules' tab is active. Below the navigation, there is a search bar with the text 'Order greater or equal to' and a dropdown menu for 'Individuals'. A red circle highlights the 'Create a new ASN' option in the 'Actions' menu. Below the search bar is a table with columns: Order, Line, Release, Release Status, Item, and Site. The table contains four rows of data for Order P1010014, each with Line 1, Release 00001, Release Status (indicated by a red X), Item 01012, and Site 10-200. Below the table, there is a button labeled 'SCH\_Ex29'. Two callout boxes provide additional information: one points to the 'Create a new ASN' option, and another explains the next steps.

**Suppliers:** The *Create a new ASN* option becomes visible under *Actions* whenever there is a quantity available to ship

When you select *Create a new ASN* option, you open the *ASN Maintenance* screen, where you can create the shipment.

In the **Schedule** views, the ASN creation option is visible under **Actions** whenever there is a quantity available to ship (according to the order).

When you select **Create a new ASN** option, you open the ASN Maintenance screen, where you can create the shipment.

This course includes a separate module on ASNs.



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