



QAD Enterprise Applications  
Enterprise Edition

# **Training Guide**

# **Customer Sequence**

# **Schedules**

70-3070C  
QAD 2011 Enterprise Edition  
Lab: Enterprise Edition 2011- Addons r02 - Training  
Workspace: 10USA > 10USACO  
April 2011

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# About This Course

## Course Description

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

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

## Course Objectives

By the end of this class, students will:

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

## Audience

- Implementation consultants
- Members of implementation teams
- Key users

## Prerequisites

- Initial QAD 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 Enterprise Edition 2011 - Addons r02 - Training environment, in the 10USA > 10USACO workspace.

### QAD Web Resources

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

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

Chapter 1

# **Introduction to QCS**

## Introduction to Customer Sequence Schedules

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

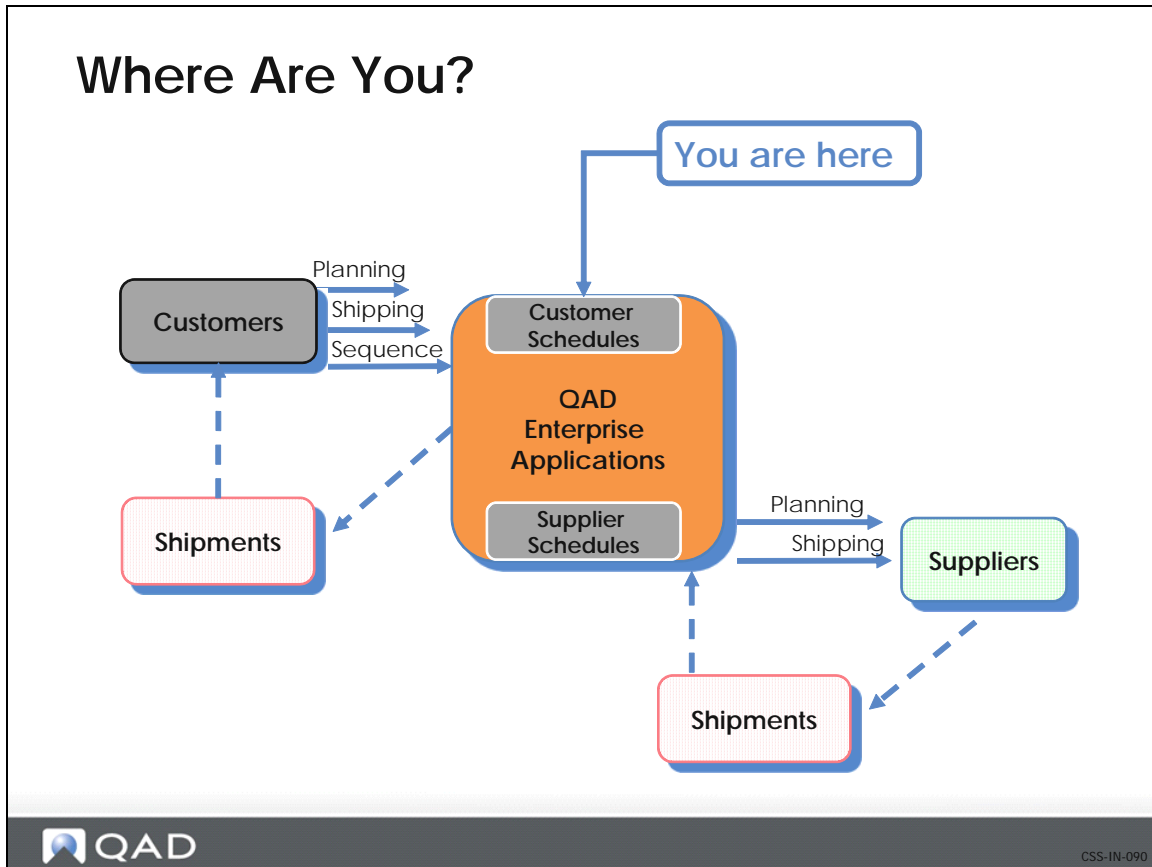
- Allows you to receive and process shorter term, detailed customer sequence schedules
- Sent by an Electronic Data Interchange (EDI) or EDI eCommerce
  - Document type 866

### 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
  - Desired packing order
- Manage short term requirements that include the sequence in which those requirements will be consumed
- Use the sequence schedule data to plan your production and shipping of the customer's requirements

## Where Are You?



Receive incoming customer sequence schedules using EDI eCommerce.

Selectively include sequence requirement information on:

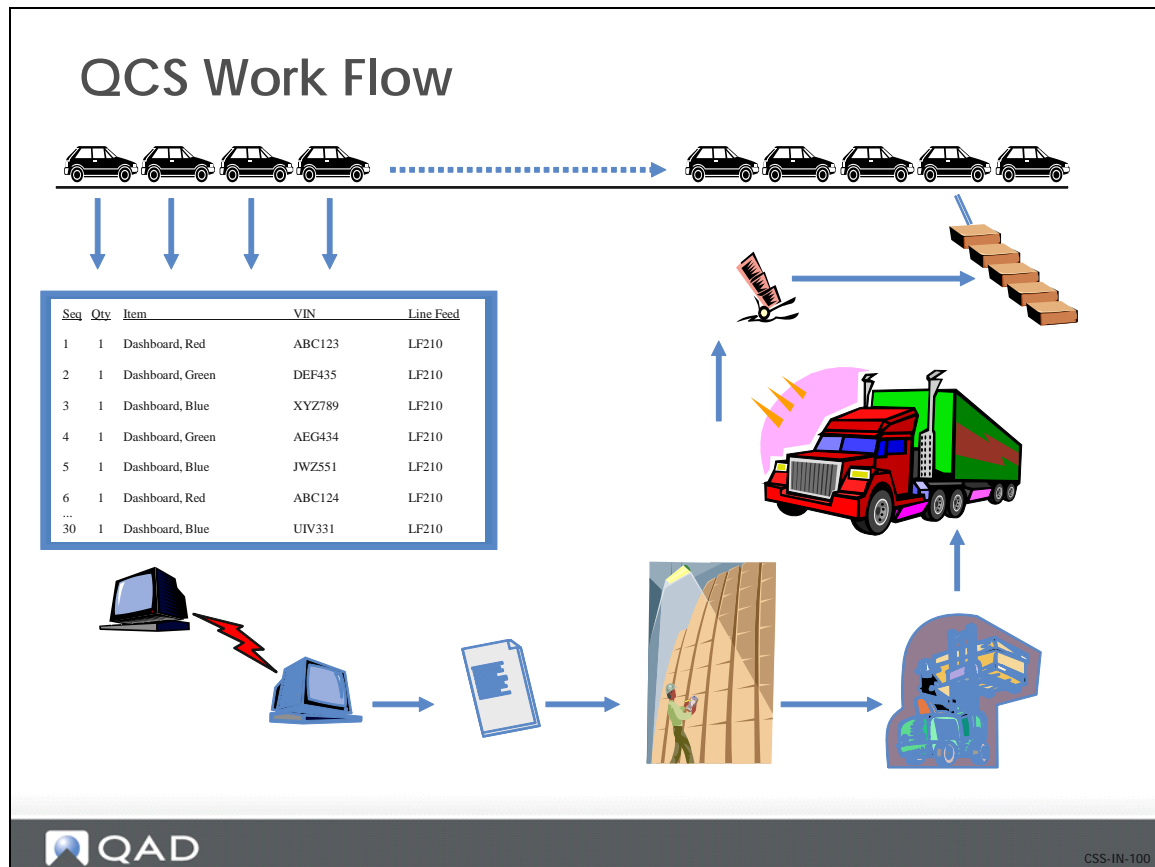
- Picklist/Pre-Shipper
- Shipper
- Invoice
- Advanced Ship Notice (ASN)
- Required Ship Schedule (RSS)

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

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

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

## QCS Workflow



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

- Existing Customer Schedules functionality did not meet this requirement

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

- Sun Roofs
- Dashboards
- Seats

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

These sequence schedules:

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

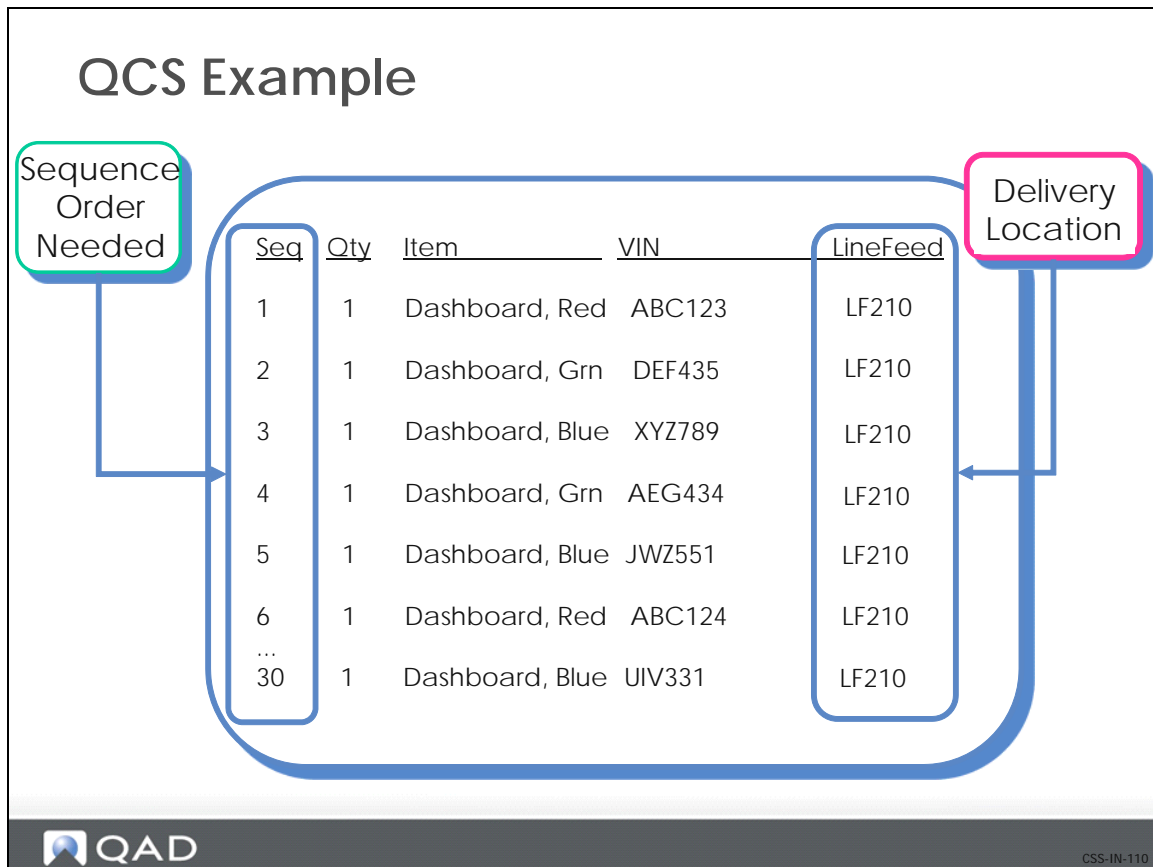
For example, in a JIT manufacturing environment such as automotive manufacturing, the supplier would provide subassemblies that are similar, but different in color, size, or other optional features (e.g., seating, sun roofs) directly to the original equipment manufacturer (OEM). The OEM



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

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

## QCS Example



## Terminology

### Terminology

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



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#### Customer Dock

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

#### Customer Job

##### Customer supplied ID

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

#### Customer Reference

Identifies the customer's end item

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

### Customer Sequence

#### Customer supplied ID

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

#### Line Feed

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

#### Packing Order

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

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

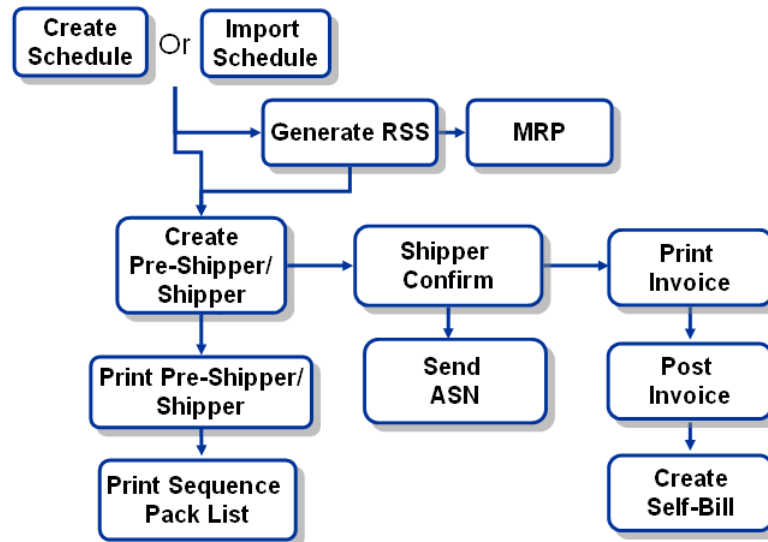
#### Sequence Pack List

New document that accompanies pre-shipper (total quantity)

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

## QCS Life Cycle

## QCS Life Cycle



## Processing QCS



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

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

Schedule Processing Menu (7.5)

## Schedule Processing Menu

Applications

7.5

7.5.1

Customer Plan Schedule Maint

7.5.2

Customer Ship Schedule Maint

7.5.3

Required Ship Schedule Maint

7.5.4.1

Customer Controls Maintenance

7.5.4.2

Customer Controls Inquiry

7.5.4.5

Sequence Schedule Maintenance

7.5.4.6

Sequence Schedule Inquiry

7.5.4.7

Sequence Schedule Report

7.5.4.10

Sequence Pre-Shipper - Automatic

7.5.4.11

Sequence Shipper Report

7.5.4.13

Sequence Cross-Ref Maintenance

7.5.4.14

Sequence Cross-Ref Report

7.5.4.16

Sequence Schedule Variance Rpt

7.5.4.17

Plan/Ship Sequence Variance Rpt

7.5.4.22

Sequence Schedule Detail Delete

Applications

7.5

7.5.4.24

Sequence Schedule Control

7.5.5

Required Ship Schedule Update

7.5.6

Selective Req Ship Sched Update

7.5.8

Schedule Inquiry

7.5.9

Schedule History Inquiry

7.5.10

Schedule Report

7.5.11

Schedule Comparative

7.5.12

Schedule Authorization Report

7.5.13

Req Ship Schedule Summary Report

7.5.14

Req Ship Schedule Detail Report

7.5.16

Cumulative Shipped Maintenance

7.5.18

Cum Shipped Reset

7.5.20

Shipment History Report

7.5.21


Ship Schedule Variance Report

7.5.22

Ship to Plan Variance Report

7.5.23

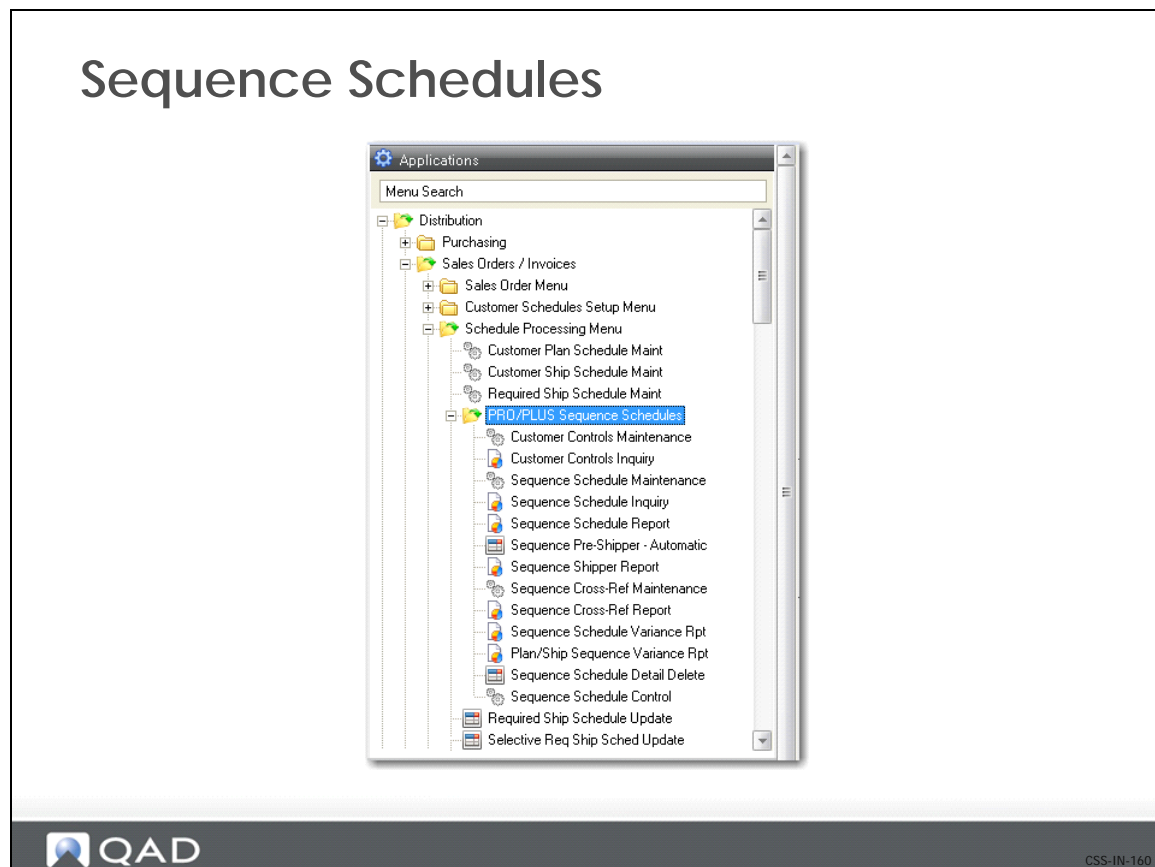
Schedule Delete/Archive

QAD

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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 1

# **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

## Business Considerations

- EDI/EDI eCommerce
- Netting Logic



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There are several business considerations to look at before setting up QCS in QAD 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

## 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.

## 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 the following Training Guide: Customer Schedules.

## Sequence Scheduled Orders

For scheduled orders with sequence schedules:

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

## 10 Training Guide — Customer Sequence Schedules

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

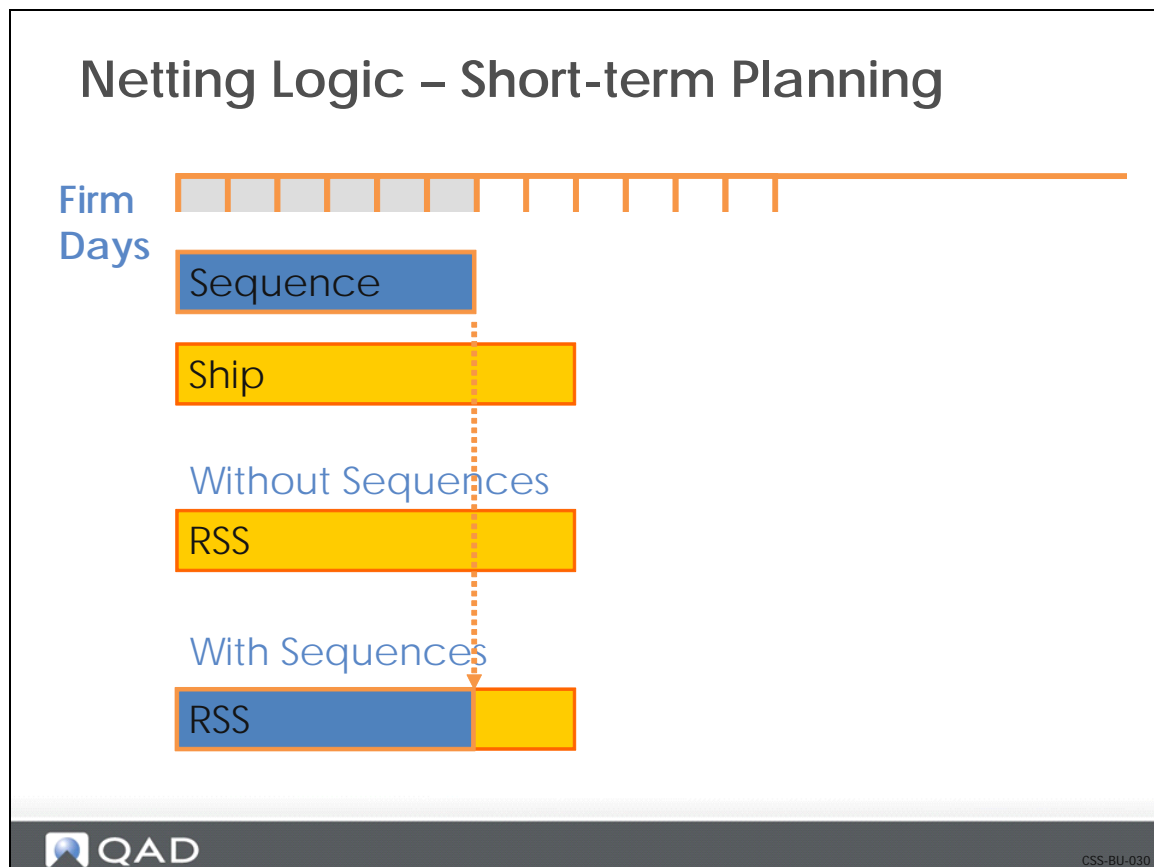


## Sequenced Scheduled Orders

## Sequenced Scheduled Orders

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

## Short Term Planning



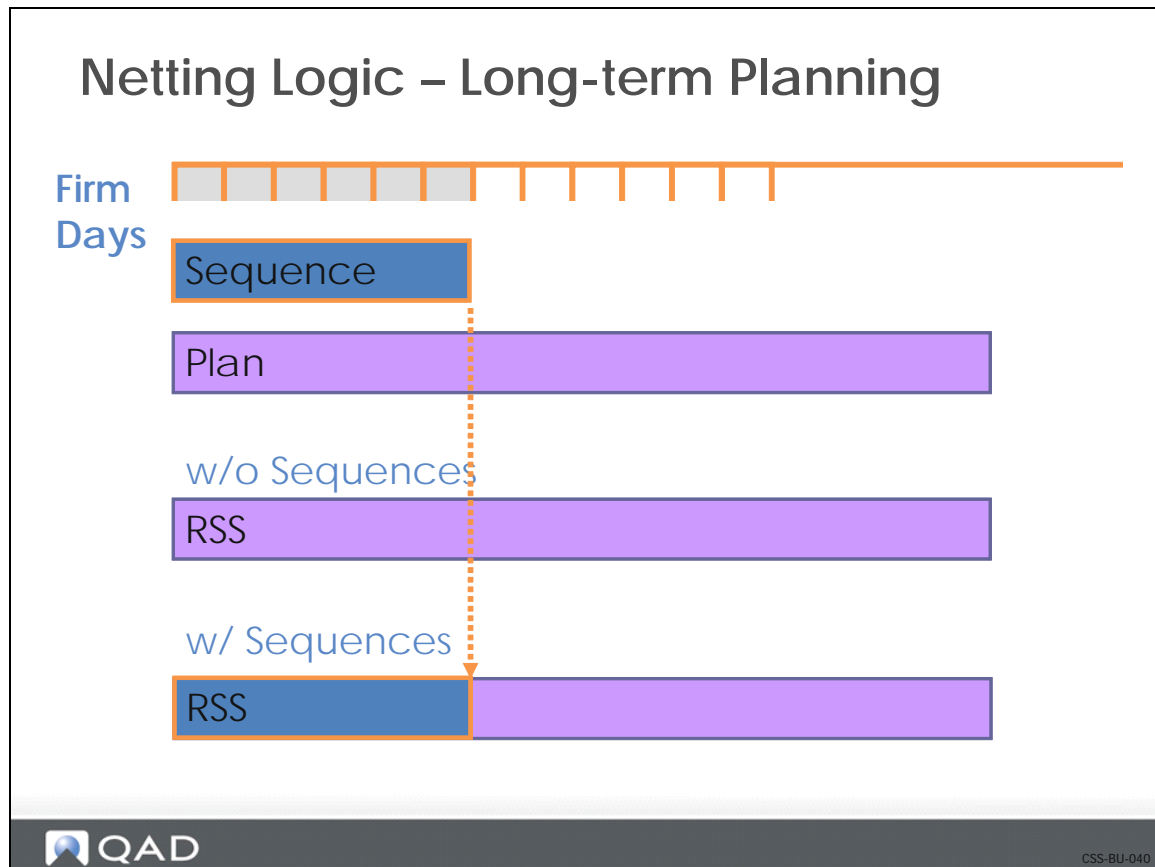
System uses the sequence and the shipping schedule to calculate the RSS.

- To determine the number of sequence schedule days, the system uses the number of Firm Days specified in the sequence scheduled order
  - Specified in 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



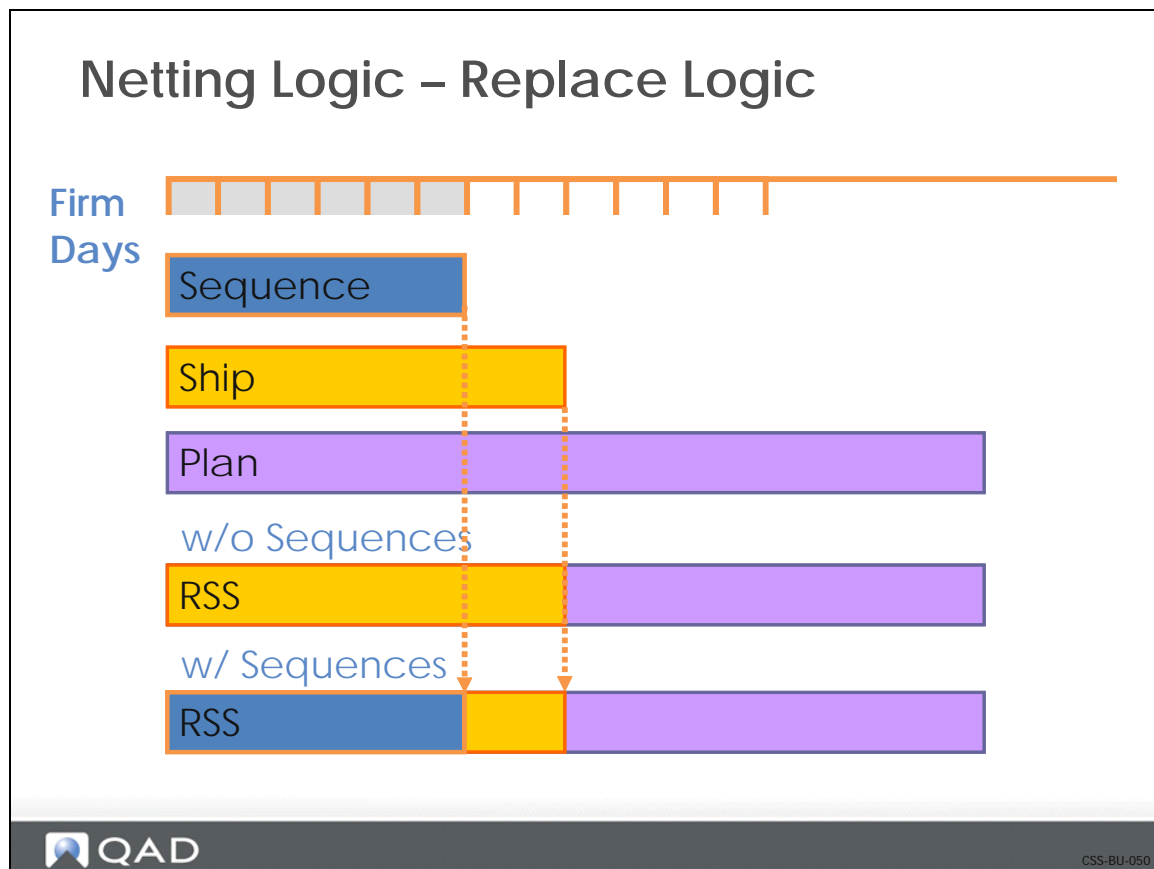
The system uses the sequence and planning schedule to calculate the RSS.

- 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



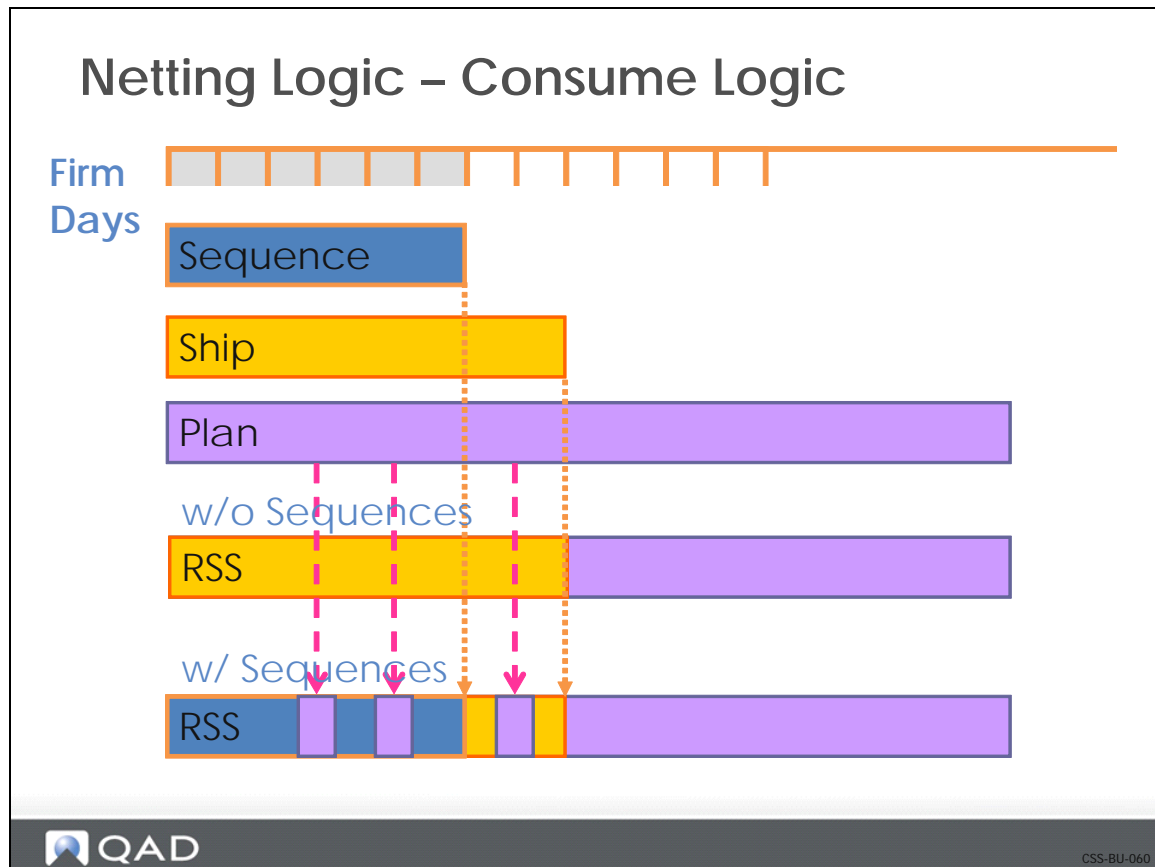
System combines the sequence, planning, and shipping schedules. Calculation starts with the specified sequence schedule days, followed by the shipping schedule, then the planning schedule.

- 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 2

# **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

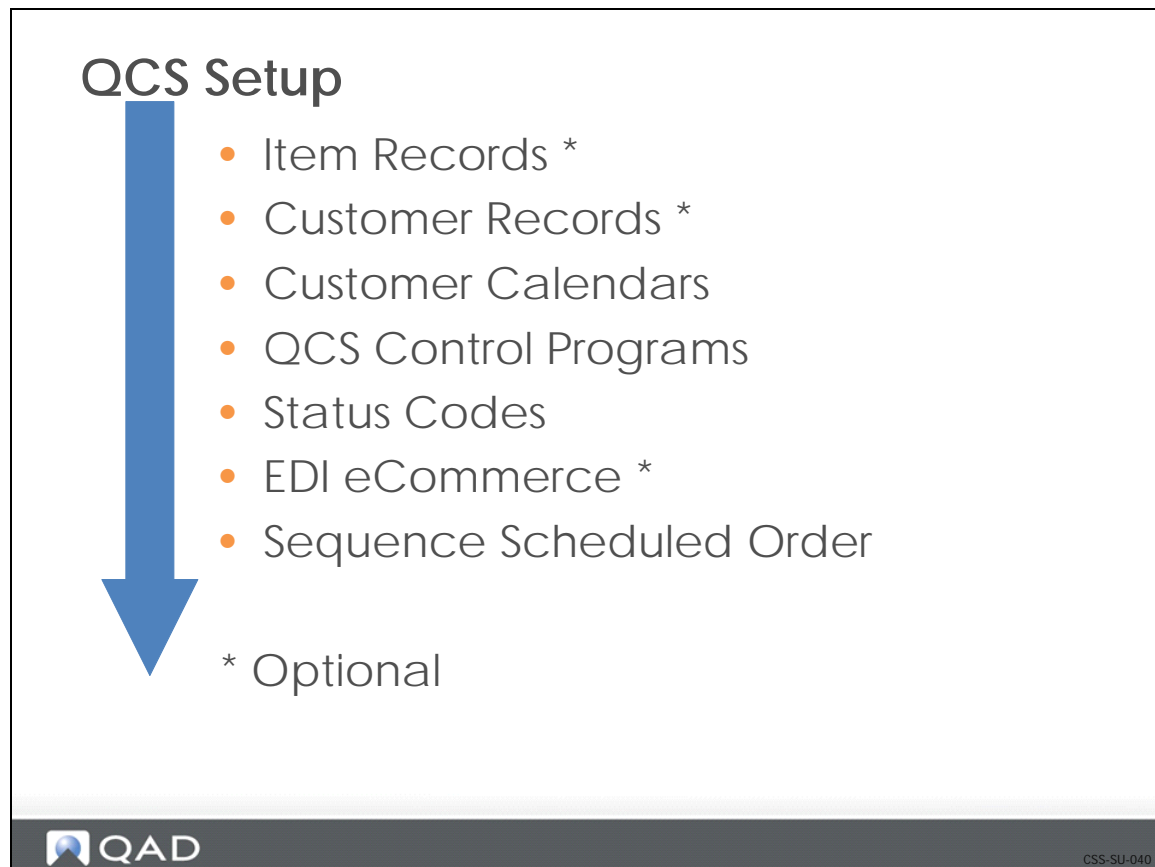
- Review and update item records.
- Review and update customer records.
- Set up customer calendars.
- Set up QCS control programs.
  - Enable QCS.
  - Define system-wide control parameters.
  - If desired, define customer control parameters.
- Define parameters for EDI eCommerce.
- Create sequence scheduled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



CSS-SU-030

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

## Item Records



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

### Customer Item Maintenance

The screenshot shows the 'Customer Item Maintenance' window. At the top, there is a title bar with 'Customer Item Maintenance' and a close button. Below the title bar is a menu bar with 'Go To', 'Actions', 'Copy', 'Print', and 'Preview'. The main area contains several input fields: 'Customer/Ship-To:', 'Customer Item:', 'Item Number:', 'Comment:', 'Display Customer Item:', and 'Customer Item ECO Nbr:'. There are two callout boxes with arrows pointing to specific fields. The first box, labeled 'Must exist in Item Master File', has an arrow pointing to the 'Item Number:' field. The second box, labeled 'Prints on Shipper & ASNs', has an arrow pointing to the 'Display Customer Item:' field. At the bottom right, there are 'Back' and 'Next' buttons. The QAD logo is in the bottom left corner, and 'CSS-SU-060' is in the bottom right corner.

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

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

Customer Create

Go To Actions Tools Attach Print Preview

Attachments

Customer Code  Active ☒

Business Relation  Bill-To Customer

Business Relation Accounting Payment Banking Defaults Credit Limit Tax Info Comments

Name

Address

Zip/City

Country Code

State

County

Telephone

Fax

E-Mail

Internet

Save and Create Save Close



Customer Create (27.20.1.1)

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

Go To Actions Copy Print Preview Attach

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:

City: Shanghai State: Post: 200000 Format: Before

Country: CHINA CN County:

Attention: Irene 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



Customer Data Maintenance (2.1.1)

CSS-SU-120

- 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

The screenshot shows the 'Customer Ship-to Create' window. The 'Address Information' tab is active, displaying fields for Business Relation, Address Type, Name, Address, Zip/City, State, County Code, and Country Code. A callout box with a blue border and arrow points to the 'Create' button, containing the text: 'Select customer, enter Ship-To Code. Click Create to display Address Info frame.'

**Customer Ship-to Create - Address Info**

Name:   
 Search Name:   
 Address Type:   
 Address Info:  ☒  
 Zip/City:   
 State:   
 County Code:     
 Language Code:    
 Telephone:   
 Fax:   
 E-Mail:   
 Internet:

- 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

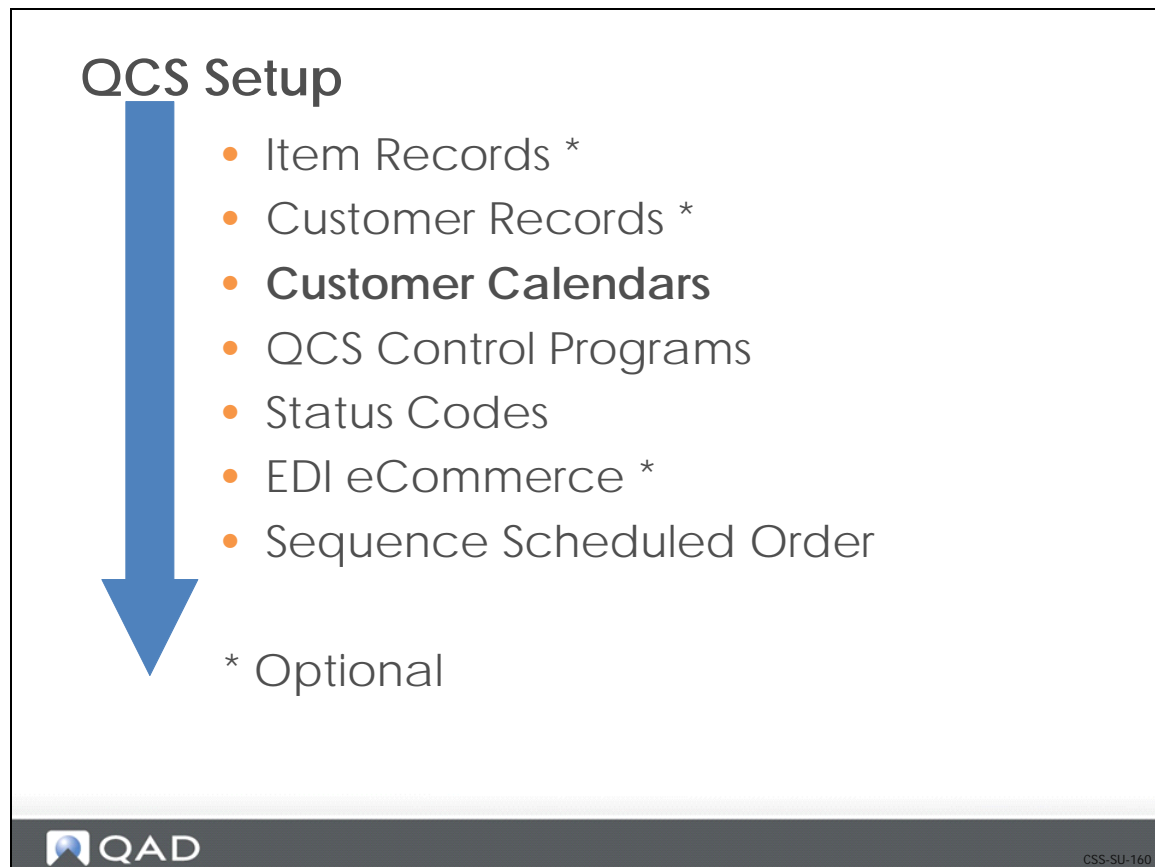
- 2 Click Create.

- 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



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, etc.
- 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:

Back      Next

QAD      CSS-SU-170

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

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

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

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

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

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

### Exercise: Customer Calendar

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 which 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

The screenshot shows the 'Sequence Schedule Control' window. It has a title bar with a close button and a menu bar with 'Go To', 'Actions', 'Copy', 'Print', and 'Preview'. The main area contains the following settings:

- Enable Sequence Schedules: ☒ (A blue arrow points from a callout box to this checkbox.)
- 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: ☒

At the bottom right are 'Back' and 'Next' buttons. A callout box with the text 'Set to Yes to Activate Sequence Schedules' has a blue arrow pointing to the 'Enable Sequence Schedules' checkbox.

**Set to Yes to  
Activate Sequence  
Schedules**

Back Next


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:

Container Parameter

Customer Job  
Customer Sequence  
Customer Reference

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

Separator

QAD

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

### Tolerance Checking: Example

The screenshot shows the 'Sequence Schedule Maintenance' window. The 'Ship-From' field is set to '100' (Your Main Warehouse), 'Ship-To' is '00010006' (Customer), and 'Release ID' is '1'. The 'Active' checkbox is unchecked. Under 'Create Date', 'Cumulative' is unchecked and 'Packing Order' is 'Reverse'. Under 'Sequences Per Container', 'Check Sequence Tolerance' is unchecked. Under 'Maximum Tolerance', 'Schedule Date Type' is 'Delivery', 'Active Start' is empty, and 'Active End' is empty. A blue arrow points from a callout box 'System displays a warning message' to a warning box that reads: 'WARNING: SEQUENCE TOLERANCE EXCEEDED. PRIOR SEQUENCE:006'. At the bottom right are 'Back' and 'Next' buttons.

Sequence Schedule Maintena... X

Go To Actions Copy Print Preview

Ship-From: 100 Your Main Warehouse

Ship-To: 00010006 Customer

Release ID: 1 Active: ☐

Create Date:

Cumulative: ☐

Packing Order: Reverse

Sequences Per Container:

Check Sequence Tolerance: ☐

Maximum Tolerance:

Schedule Date Type: Delivery

Active Start:

Active End:

System displays a warning message

WARNING: SEQUENCE TOLERANCE EXCEEDED. PRIOR SEQUENCE:006

Back Next

QAD CSS-SU-230

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

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

## Print Sequence Range on Pre-Shipper: Example

**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	<b>P R E - S H I P P E R</b>  Pre-Shipper ID: P00000288 Ship Date: 02/01/00 Print Date: 02/01/00 Page: 1  Ship To: 01000036  Northwest Reliable 1000 B Street Coos Bay United States of America  Mode of Transport: Carrier Shipment Ref: P00000288 Vehicle ID:
--	---


**Sequence Ranges**

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

Sequence Ranges

Customer Job: 20000128

Customer Sequence	To
001	005


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

Bill To: 01000036

**I N V O I C E**

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

Sold To: 01000036


**Sequence Ranges**

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

Customer Job: 20000128

Sequence Ranges

Customer Sequence	To
001	005


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: 5

Packing Order: Forward

Sequences Per Container: 0

Merge Schedules: ☐

Check Sequence Tolerance: ☒

Maximum Tolerance: 0

Print Sequence on Shipper: ☒

Print Sequence on Invoice: ☒

Send Sequence with ASN: ☒

Send Sequence with Invoice: ☒

Settings Only Apply To This Customer/Ship-To Address

Delete Back Next

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 Mainten...


Go To Actions Copy Print Preview

Field Name: rcsd\_Status

Value: Offline

Comments: Sequence is off customer production line

Delete Back Next


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 (e.g., Offline)
- Can use to create a Blank status code
  - Value field would be <blank>
- Creating status codes is optional

## Exercise: Create Status Codes

In the following exercises you need to use status codes.

Use Generalized Codes Maintenance (36.2.13).

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

Field	Data
Field Name:	rcsd_status

- 2 Create a second status code by entering:

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

- 3 Create a third status code by entering:

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

## EDI eCommerce

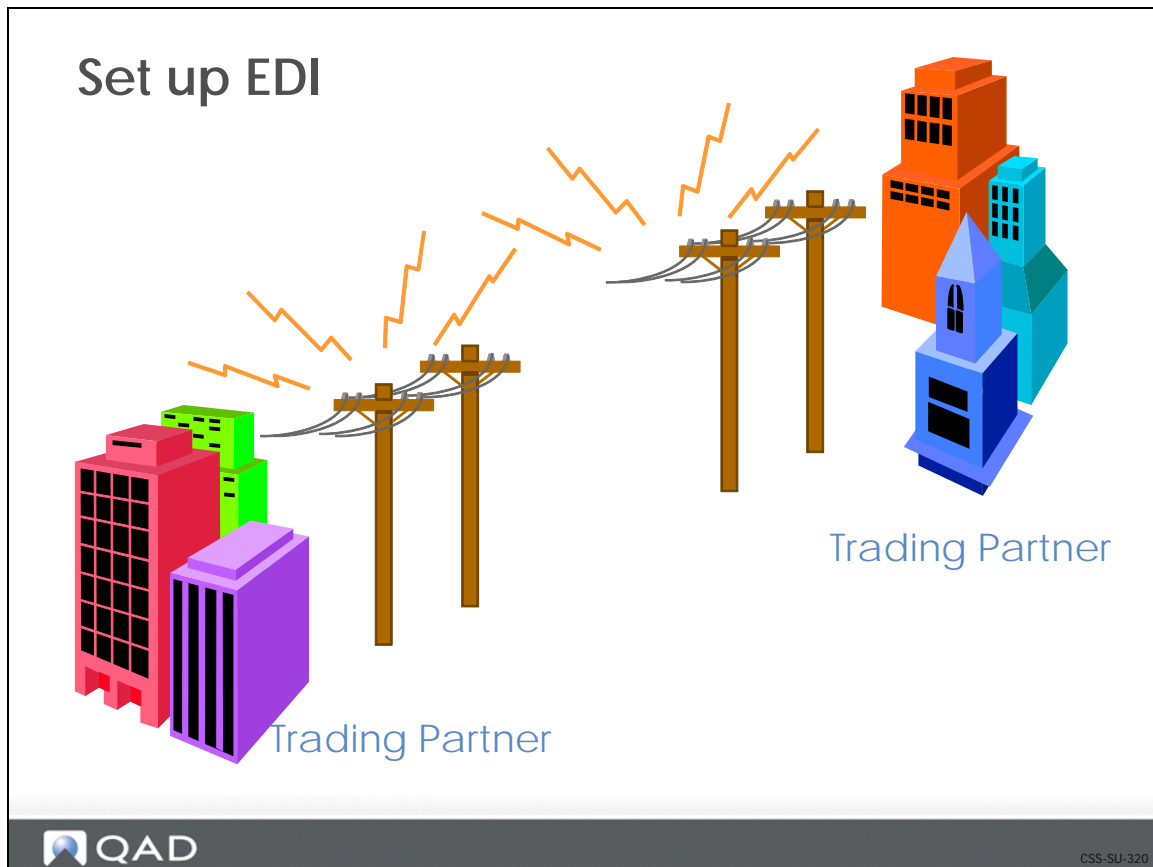
### QCS Setup



- 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

Exchange Definition Maintenance
Go To Actions Copy Print Preview

File: MFG850  
Desc: MFG850 Flat File

Version: 1

Direction: Out  
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

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.

## Exchange Definition Maintenance (35.15.8)

### Exchange Definition Maintenance

Exchange Definition Maintenanc... X

Go To Actions Copy Print Preview

File: MFG850  
 Desc: MFG850 Flat File

Version: 1

Direction: Out  
 Advanced: ☐

Exchange File Field Record: Header							
Seq	Name	Reqd	Type	Min	Max	Token	Adv
1	ShipTo	Opt	an	1	24		<input type="checkbox"/>
2	ShipFrom	Optional	an	1	24		<input type="checkbox"/>
3	PONumber	Optional	an	1	10	tp-document-nbr	<input type="checkbox"/>
4	Filler1	Optional	an	1	1		<input type="checkbox"/>
5	CreditTerms	Optional	an	1	8		<input type="checkbox"/>
6	Filler2	Optional	an	1	1		<input type="checkbox"/>
7	FOB	Optional	an	1	20		<input type="checkbox"/>
8	Filler3	Optional	an	1	1		<input type="checkbox"/>
9	DueDate	Optional	d	1	6		<input type="checkbox"/>
10	Filler4	Optional	an	1	4		<input type="checkbox"/>
11	ShipToName	Optional	an	1	28		<input type="checkbox"/>

CSS-SU-440

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

- Cust-Seq-Sched

Exchange File Field Record: Header Frame

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

**Application Definition Maintenance (35.15.10)**

## Application Definition Maintenance

Application Definition Maint X

Go To Actions Copy Print Preview

Name: MFG850  
Gtway Prgm: edompopr.p


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

Direction: Out  
QAD

**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

QAD

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

Application Name: customer-schd

Direction: In Desc: 866 Schedule

Advanced: ☐

Version: 1

Version: 1

Print Gateway Error Data: ☐

**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: ☒  
 Exchange File Name: MFG850      Version: 1      Debug level: 0  
 Application: MFG850      Version: 1      Many to Many: ☐  
 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	O	HDR.order-date	Equat	F	SysDate
Header	RE	30	E	O	HDR.tp-ship-to	Equat	F	getMFGPROAddress
Header	RE	40	E	O	HDR.tp-ship-fro	Equat	F	getMFGPROSite
Header	RE	50	E	O	HDR.purchase-or	Equat	I	Header.PONumber
Header	RE	60	E	O	HDR.credit-term	Equat	I	Header.CreditTe
Header	RE	70	E	O	HDR.due-date	Equat	I	Header.DueDate
Header	RE	80	E			If	F	notblank
Header	RE	90	E	O	HDR.due-date	Equat	F	ToDate
Header	RE	100	E			EndIf		

Delete Back Next



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 X
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


App Site: Site-10

TP Address:

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"/>
	<input type="checkbox"/>

BackNext

QAD

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

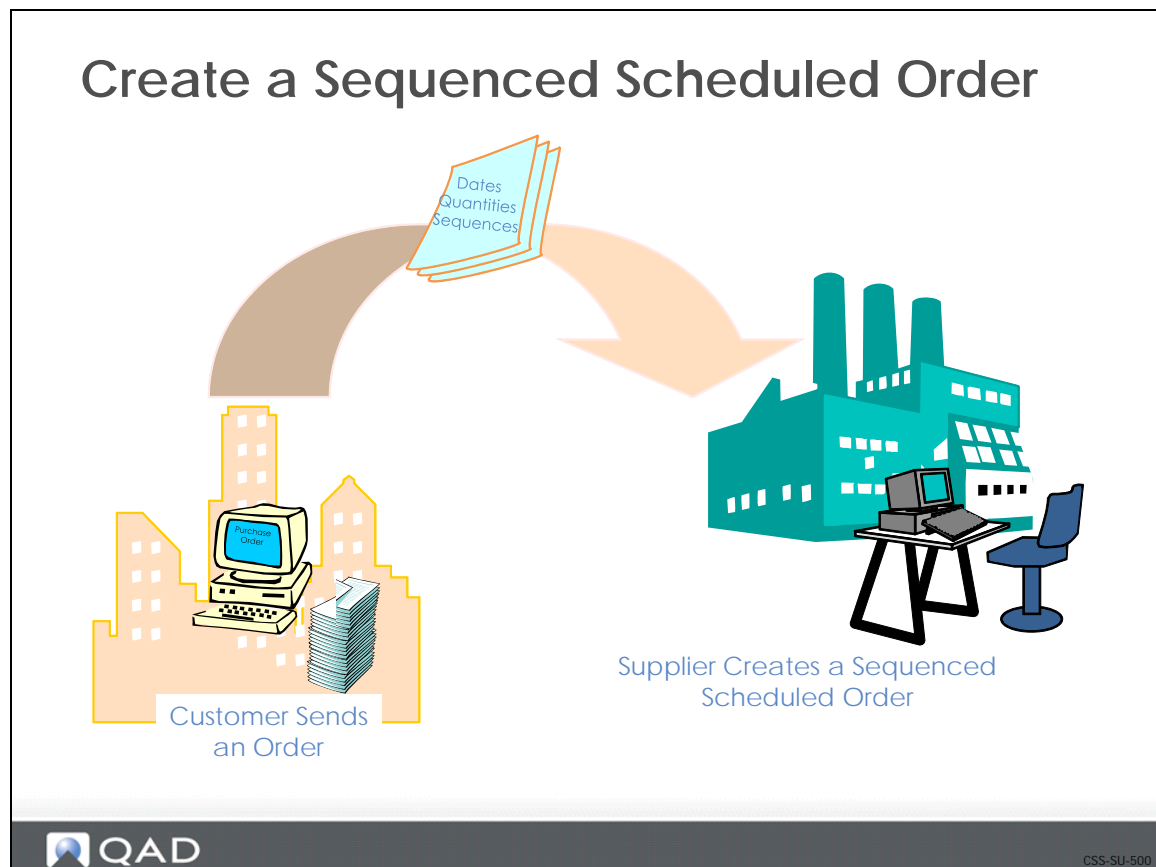
### QCS Setup



- 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 do 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

The screenshot shows the 'Customer Scheduled Order Maintenance' window. At the top, there are tabs for 'Go To', 'Actions', 'Copy', 'Print', 'Preview', and 'Attach'. Below the tabs, the 'Ship-From: 10-300' and 'Bill To: 30C1002' are displayed. The 'AR Site: 10-300' is also visible. The 'Order: S0101' and 'Namaka Motor Company' are listed. The 'Order Data' section contains various fields and checkboxes. Two callout boxes provide additional information: one pointing to the 'Transport Days' field with the text 'Determines the Transport Lead Time', and another pointing to the 'Sequenced' checkbox with the text 'Yes Indicates This is a Sequence Scheduled Order'.

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

Order Data

Ship Via: **FEDX**      FOB Point: **0.00**      **Determines the Transport Lead Time**

Taxable: ☒      Week Offset: **0**      Trade Sales: ☐      Customer Ref Is Customer Item: ☐      Print Invoice History: ☒      EDI Invoice History: ☐      Print Pack List: ☒      Comments: ☐      Channel: **Cum**

Include Sat/Sun: ☒      Consignment: ☐      Bill To: **30C1002**      AR Site: **10-300**      Ship to Cum/Req: **Cum**      Customer/Shop: **Y**

Auto Inv Post: ☐      Import/Export: ☐      Sequenced: ☒      **Yes Indicates This is a Sequence Scheduled Order**

Dynamic Unpeg: ☐      Entered By: **qmi**      Remarks:

Back      Next

**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

## Tax Data Frame

### Tax Data Frame


Go To Actions Copy Print Preview

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

Order Data

AR Account: 1200 Ship Via: GROUND  
Taxable: ☐ Tax Usage:  0.00  
Week Offset: 0 Tax Environment: NY  
Inv by Auth: ☐ Tax Class:   
Include Sat/Sun: ☒ Taxable: ☐  
Cumulative: ☐ Tax In: ☐  
Consignment: ☐ Bill To: 00010006  
Auto Inv Post: ☒ Comments: ☐  
Import/Export: ☐ AR Site: 100  
Sequenced: ☒ Channel:   
Dynamic Unpeg: ☐ Ship to Cum/Req: Cum  
Entered By: mfg Currency: USD  
Remarks:

Back Next

CSS-SU-540

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



## Line Item Data Frame

Line Item Data Frame

Go To Actions Copy Print Preview

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

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

**Order Line Item Data**

Discount Tbl:   
List Price: 20.00  
Net Price: 20.00  
Sales Account: 3000 100 1000  
Discount Acct: 3905 100 1000

Consume Forecast: ☒  
Type:   
Location: FG  
Taxable: ☐  
Category:   
Consignment: ☐

Delete Back Next

QAD CSS-SU-550

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

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

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

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

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

## Order Line Item Data: First Frame

## Order Line Item Data: First Frame

Go To Actions Copy Print Preview

Ship-From: 100  
Ship-To: 00010006

Order: S033695  
Customer

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

Finished Good #100634

UM: EA  
  
  
  
Line: 1

**Order Line Item Data**

Discount Tbl:   
List Price:   
Net Price:   
Sales Account:     
Discount Acct:

Consume Forecast: ☒  
Type:   
Location:   
Taxable: ☐  
Category:   
Consignment: ☐

Delete Back Next

CSS-SU-560

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

## Order Line Item Data: Second Frame

## Order Line Item Data: Second Frame

Go To Actions Copy Print Preview

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

1/3 - Mon/Wed/Fri

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:

Connection with Firm Days

Back Next

## 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 3

# **Loading Sequence Schedule Release**

## Load QCS Release

In this section you learn how to:

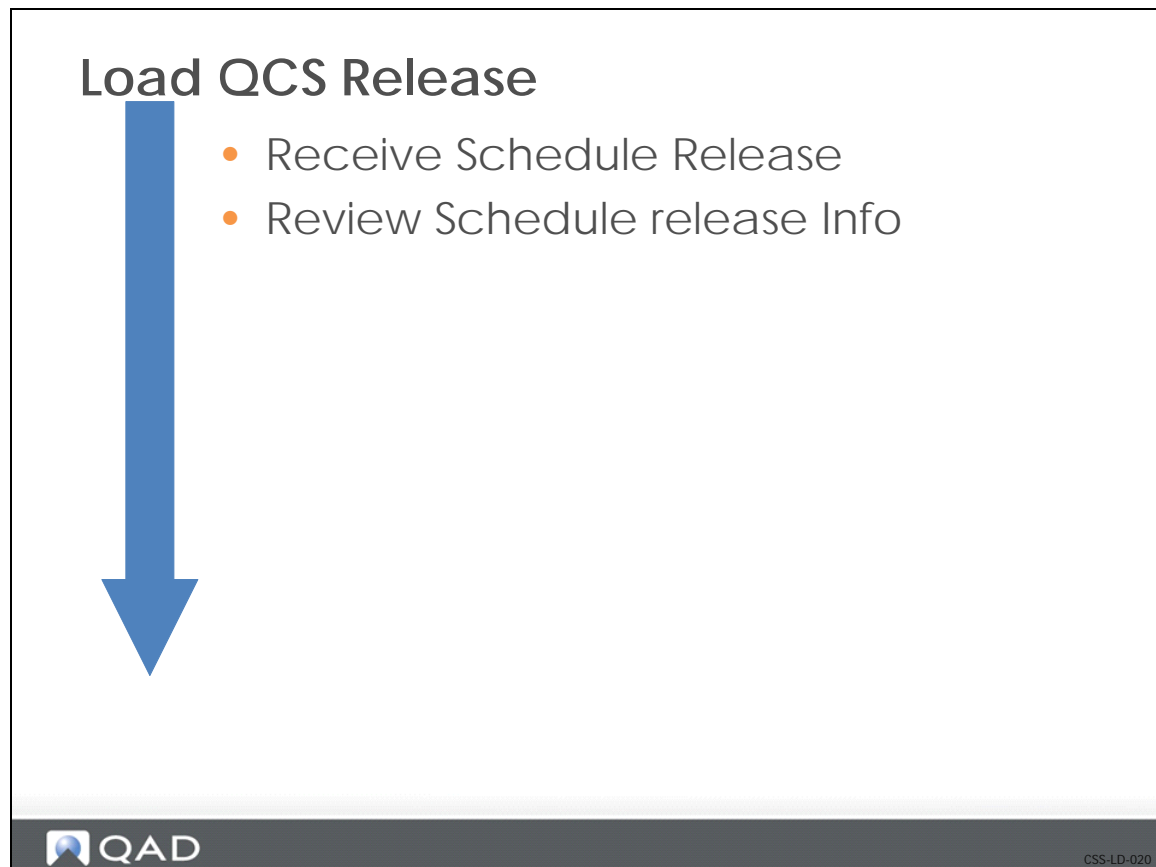
- Identify key business considerations before setting up QCS in QAD Enterprise Applications
- Set up QCS in QAD Enterprise Applications
- **Loading QCS in QAD Enterprise Applications**
- Planning QCS in QAD Enterprise Applications
- Shipping QCS in QAD Enterprise Applications
- QCS Features and Options



CSS-LD-010

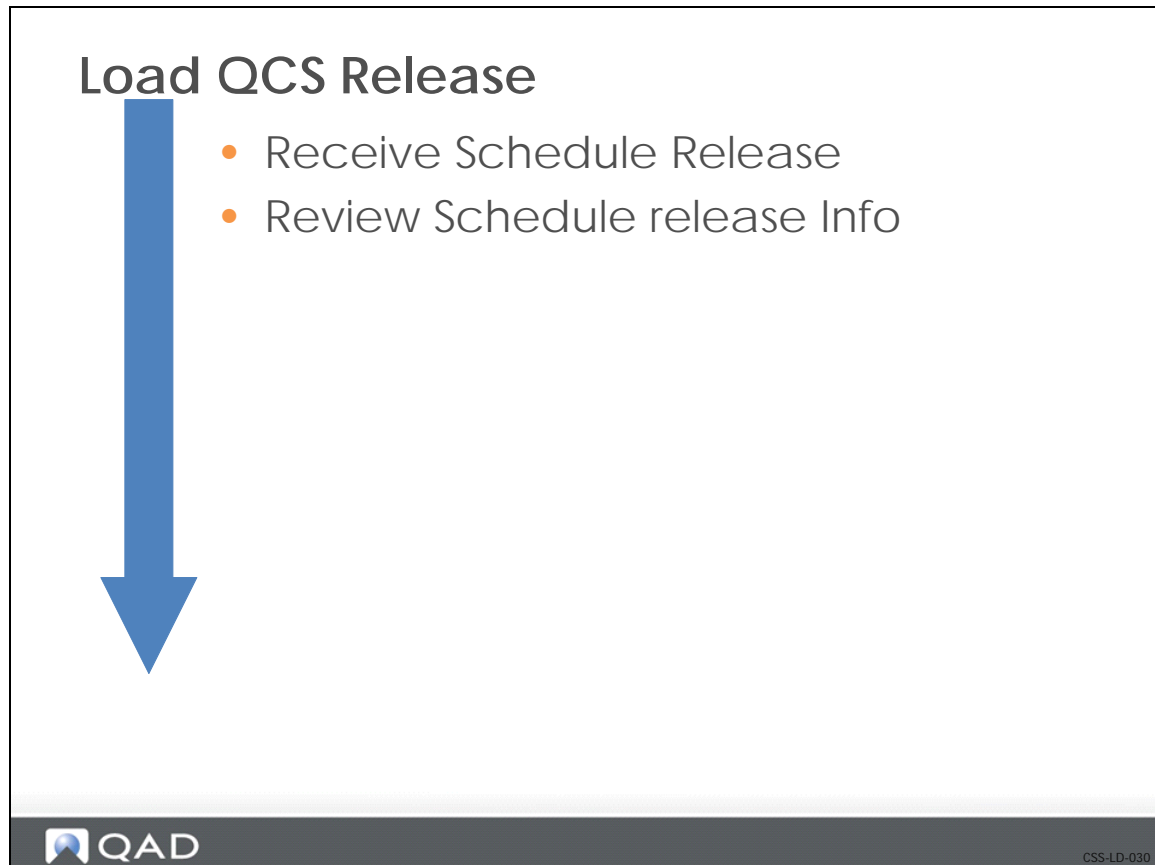


## Load QCS Release



This illustration is a suggested setup sequence of master records for the QCS module which is 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



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

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

There are two types of schedule releases supported by QAD 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 (e.g., weekly, monthly buckets)
- Shipping Schedule (862, Deljit)
  - Shows short-term planning (e.g., daily buckets)
  - Usually the more accurate

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

QAD 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

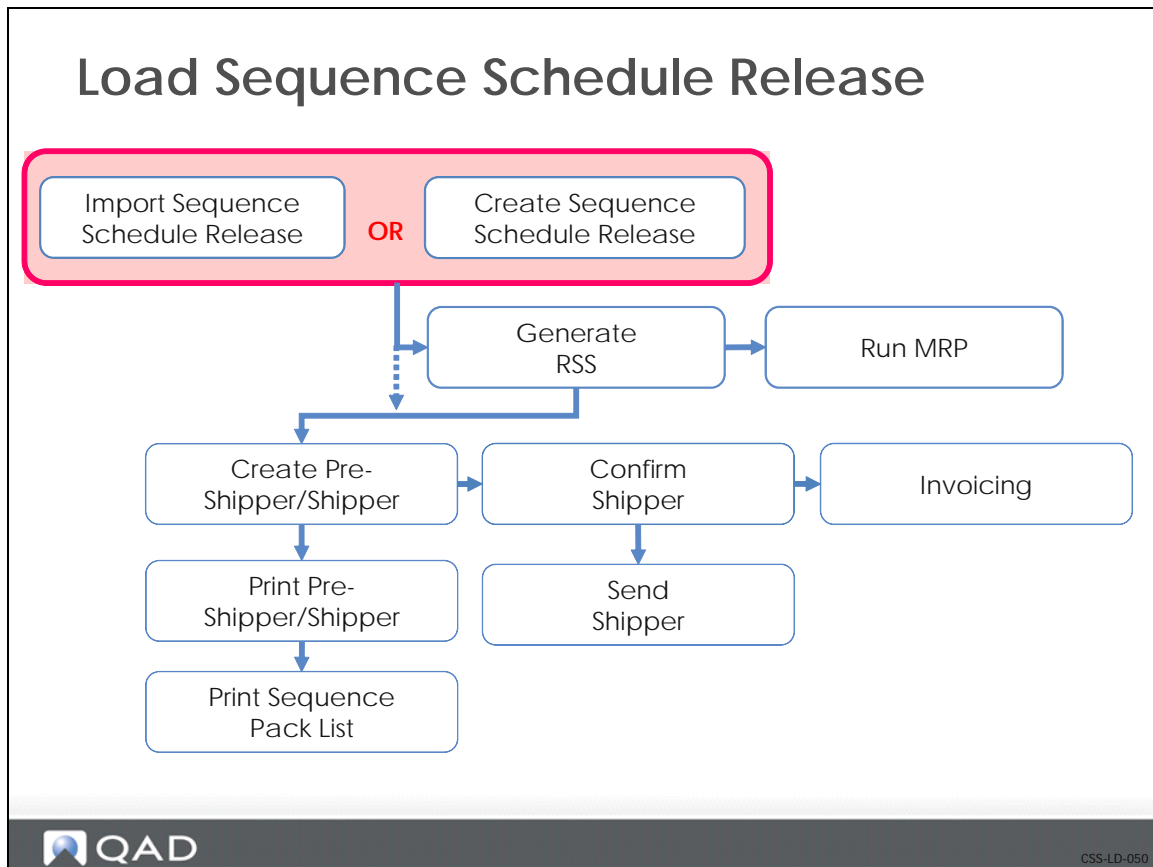
- 15 Advance to the Schedule Detail Data frame and enter the following:

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.



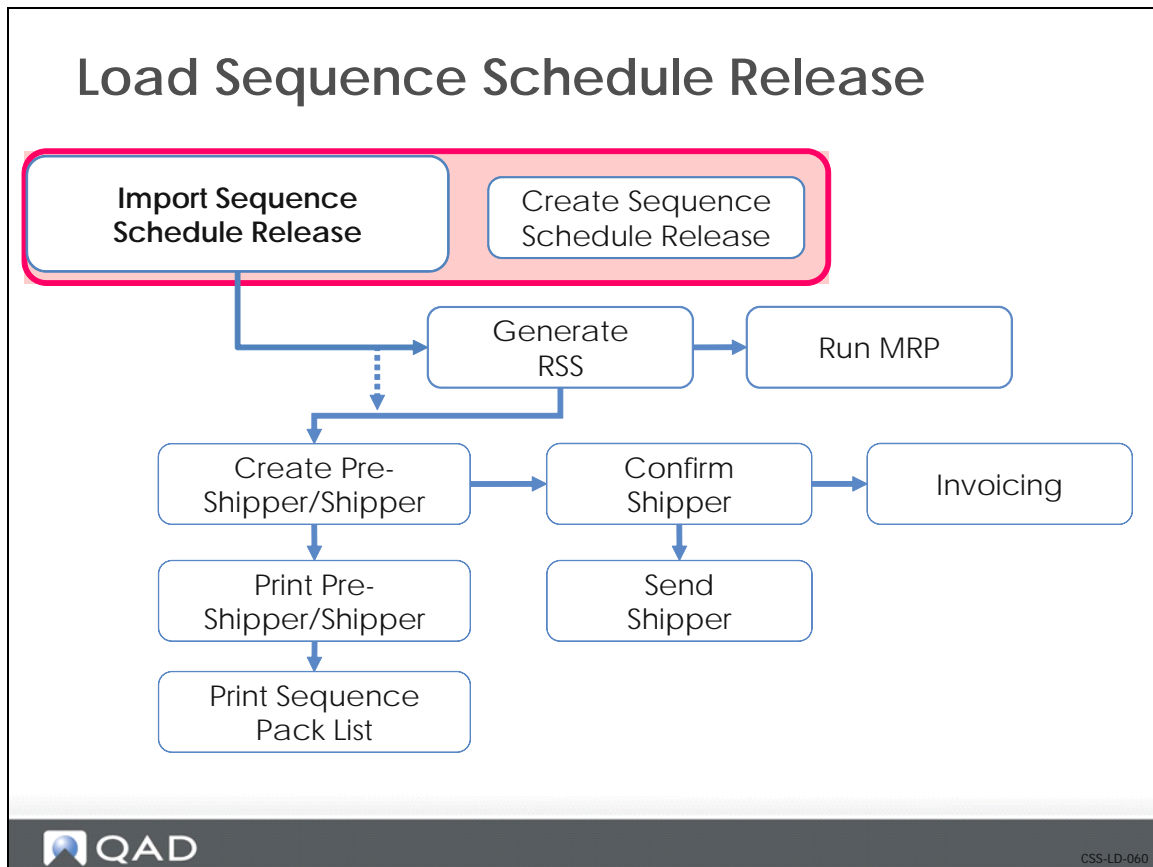
## Load Sequence Schedule Release



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)



## Shipper Gateway

The screenshot shows the 'Shipper Gateway' application window. The title bar reads 'Shipper Gateway'. Below the title bar is a menu bar with 'Go To', 'Actions', 'Copy', 'Print', and 'Preview'. The main area contains a 'Process/File:' dropdown menu set to 'File', a 'File Name:' text input field, and two checkboxes: 'Load Multiple Containers:' and 'Verify Only:'. An 'Output:' label is positioned to the right of these checkboxes. At the bottom right of the window are 'Back' and 'Next' buttons. The QAD logo is in the bottom left corner, 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:

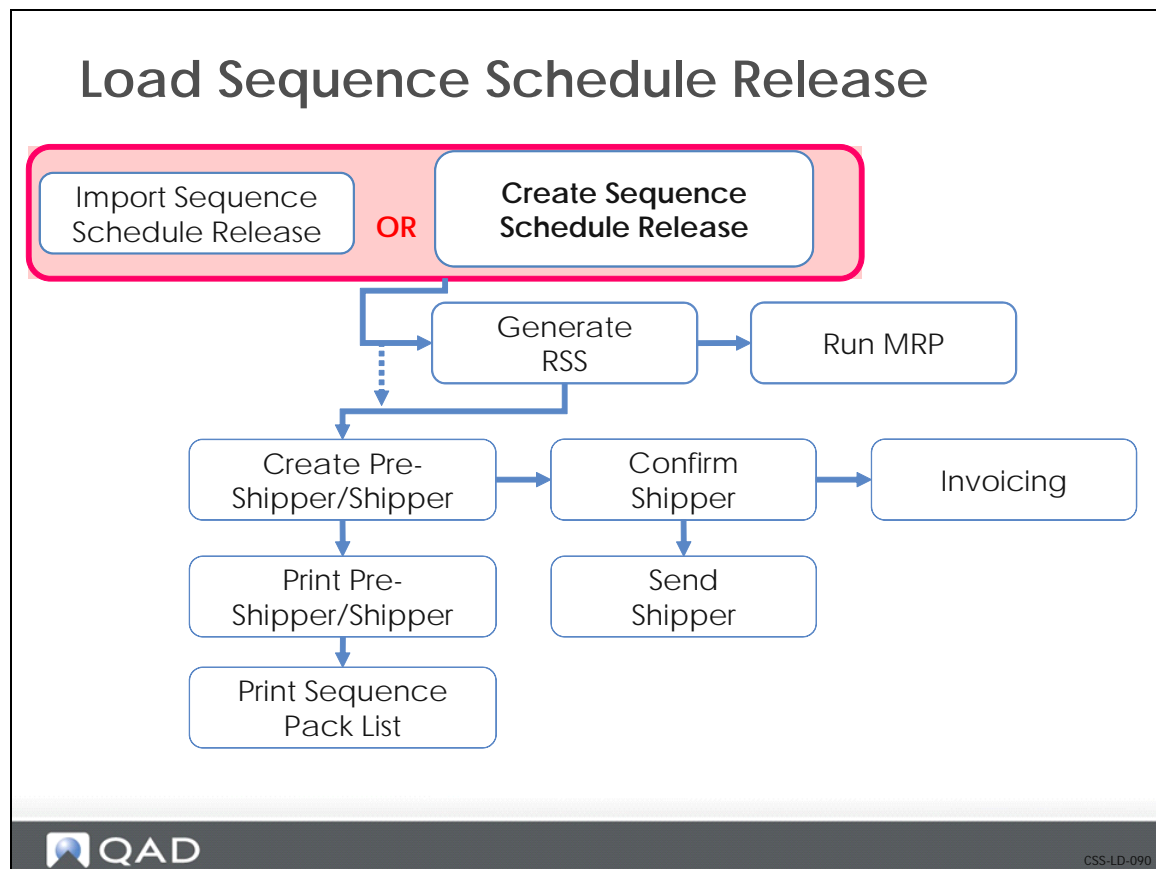
Field	Data
Import from File/Process:	File
Import File/Process Name:	train1.886
Report Detail/Summary:	Detail
Update:	No

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

### Creating a New Release

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

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

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

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

If you choose No, then the system:

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

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

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

#### Header Frame

In the header frame you identify the sequence schedule.

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

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

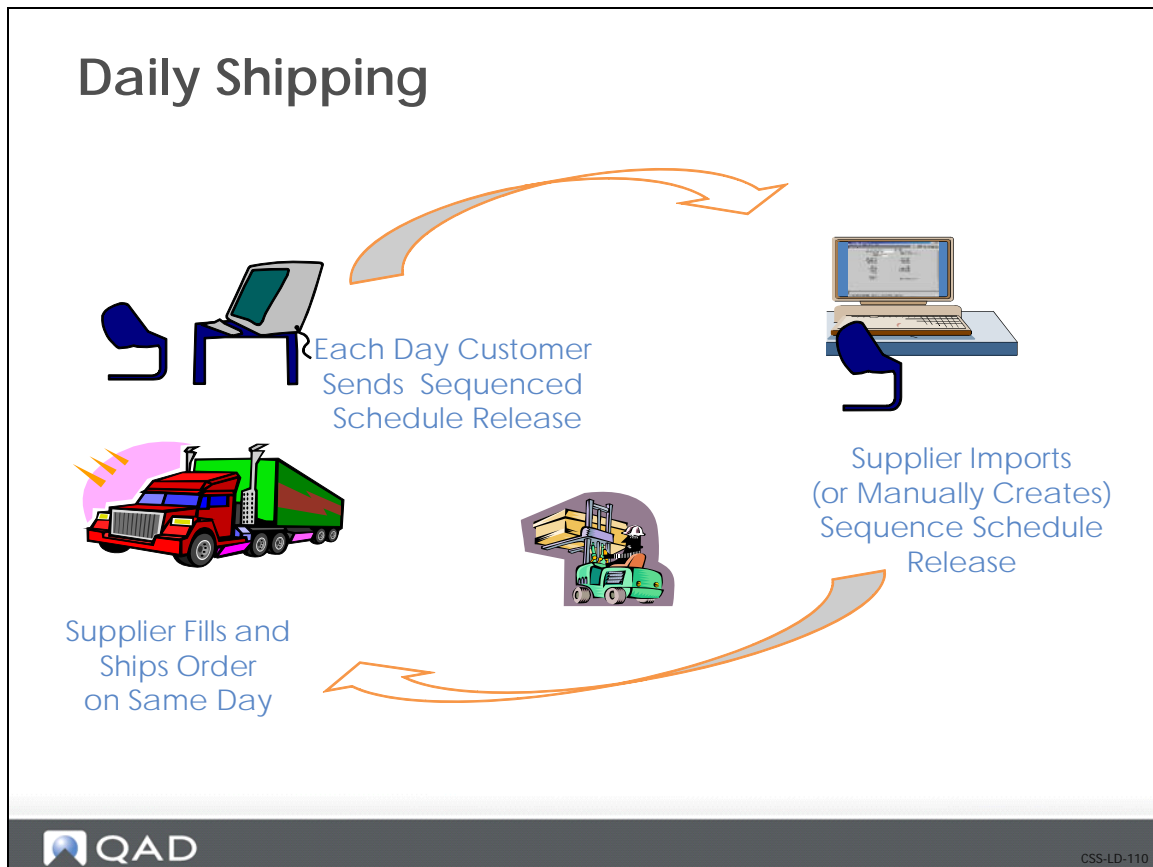
Use the Sequence Detail Data frame to:

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

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



## Daily Shipping



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

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

## Review Schedule Release Information

### Reviewing Schedule Release Information

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

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

### Sequence Schedule Inquiry (7.5.4.6)

## Sequence Schedule Inquiry

Sequence Schedule Inquiry X

Go To Actions Copy Print Preview

Ship-From: 110

Ship-To: 1005000

Release ID: RS00001

Active: ☐

Starting Job:

Starting Sequence:


Starting Date: ▼

Output:

Starting Points Allow You to Determine Where to Start Looking

Back

Next

 QAD

CSS-LD-140

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

Can view all or all from a specified starting point

## Sequence Schedule Report (7.5.4.7)

Sequence Schedule Report

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: ☒ Sub-Totals: ☐

Details: ☐

Back Next

Sequences Marked as Deleted Not Included in the Report

QAD CSS-LD-150

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

- Gives you a snapshot of what is going on

The report criteria gives you the option of:

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

Sample Detail Report

# Sample Detail Report

rcrp05.p  
Page: 1

7.5.4.7 Sequence Schedule Report  
Public Test Progress 91

Date: 01/28/00  
Time: 11:29:02

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

nj plant  
General Motors  
Lake Orion Assembly Plant  
Active: yes


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

Active End:

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

Date: 12/08/99

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

QAD

CSS-LD-160

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

## Sample Report with Sub-Totals

# 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-17

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

## Exercise: Print Sequence Schedule Report

Use Sequence Schedule Report (7.5.4.7)

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

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

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

## Sequence Schedule Variance Report (7.5.4.16)

# Sequence Schedule Variance Report

Sequence Schedule Variance... X

Go To Actions Copy Print Preview

Ship-From:   
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:

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**

The screenshot shows a software window titled "Plan/Ship Sequence Variance...". It has a menu bar with "Go To", "Actions", "Copy", "Print", and "Preview". The form contains several input fields: "Ship-From:", "Ship-To:", "Item Number:", "Order:", "To:", "To:", "To:", "To:", "Variance %:" (with a value of "00"), "ABC Class:", "Output:", and "Batch ID:". A blue arrow points from a callout box to the "Variance %" field. The callout box contains the text "Use to Specify Percentage Reported". At the bottom right, there are "Back" and "Next" buttons. The QAD logo is in the bottom left corner, and "CSS-LD-200" is in the bottom right corner.

Use to Specify Percentage Reported

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

- Variance percentage reported



Chapter 4

# Planning

## Plan QCS

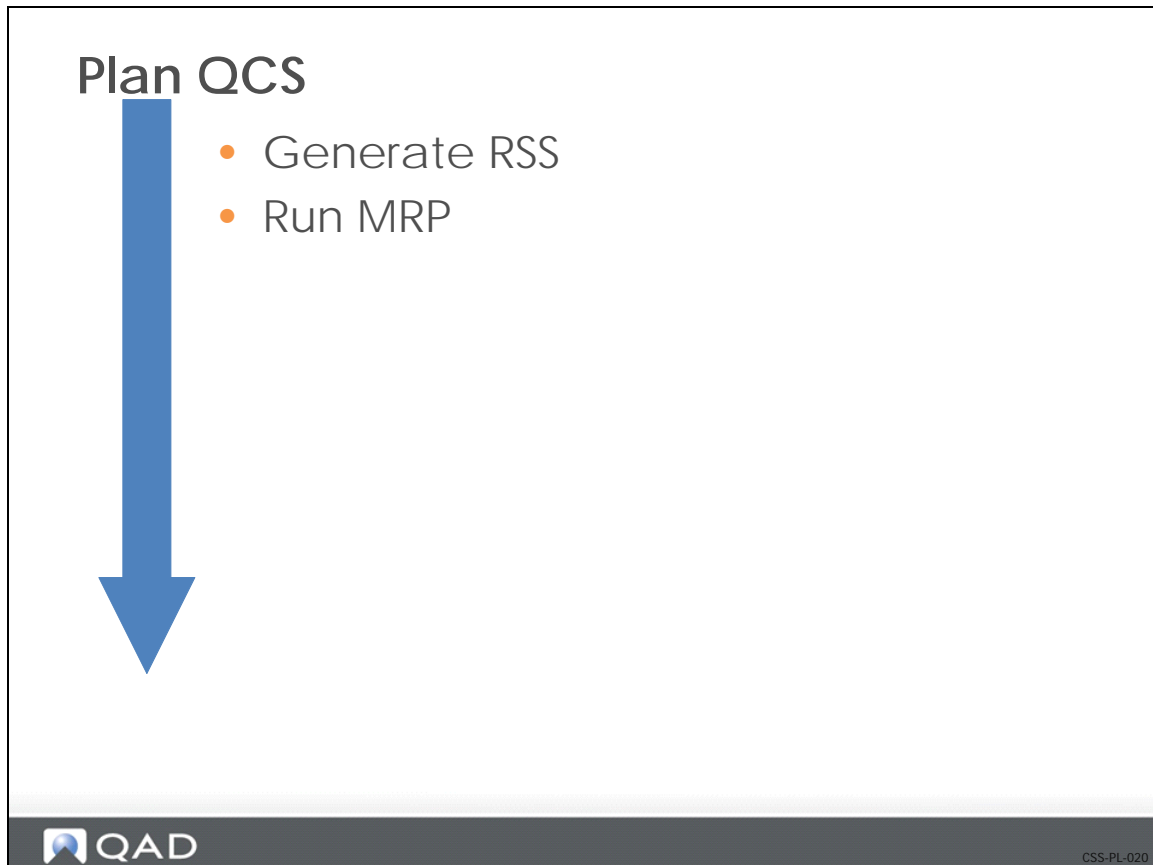
In this section you learn how to:

- 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



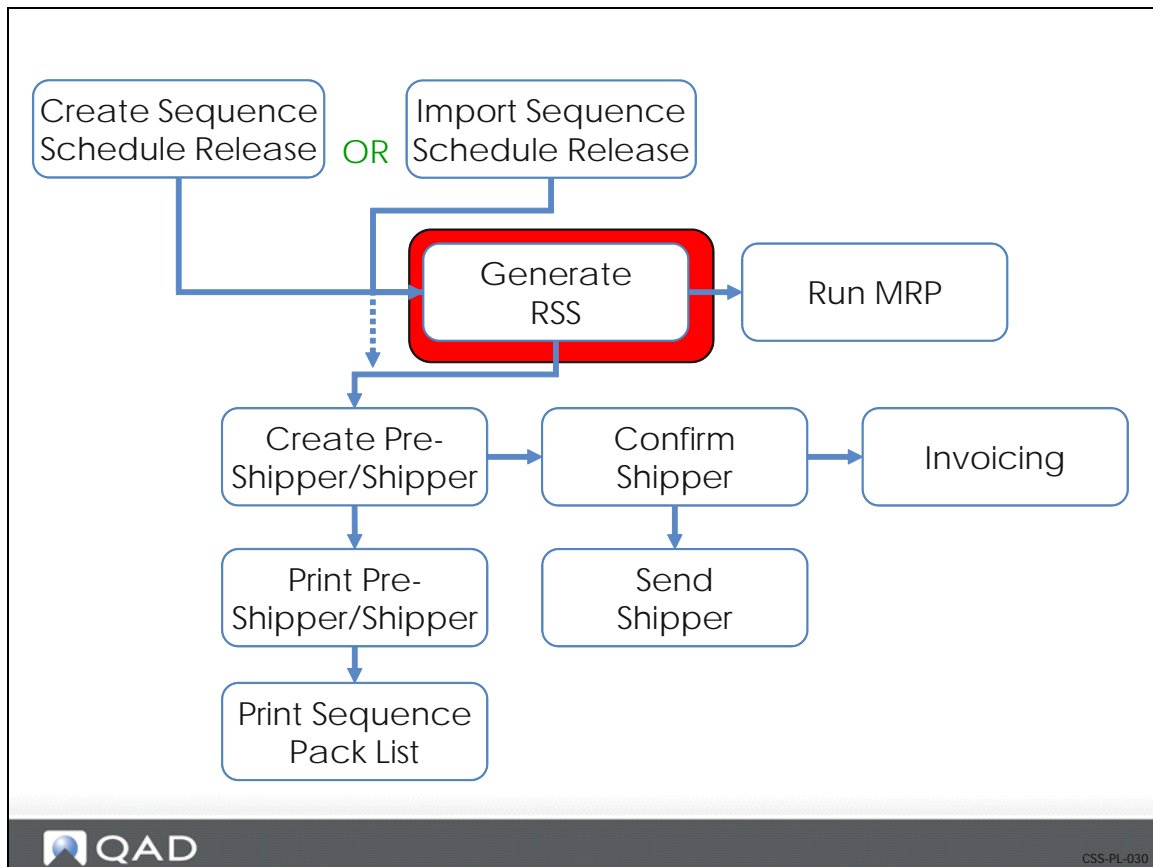
CSS-PL-010

## Plan QCS



This illustration is a suggested setup sequence of master records for the QCS module which is 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: 100000	To: 200
Sold-To: 200	To:
Ship-To:	To:
Dock:	To:
Item Number:	To:
PO Number:	To:
Customer Ref:	To:
Model Year:	To:
Order:	To:

Report Detail/Summary: Summary  
Update: Yes

Output:  
Batch ID:

Determines if RSS is created

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

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

Use Required Ship Schedule Update to generate a new RSS.

The RSS:

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

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

### Creating the RSS

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

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

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

CSS-PL-060

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

## Required Ship Schedule Update Report: Shipping Schedule

### Required Ship Schedule Update Report: Shipping Schedule

rcrsup.p  
Page: 2

7.5.5 Required Ship Schedule Update  
Public Test Progress 91

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

Customer Ship Schedule- Required Quantities

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

Order: SO2077  
Northwest Reliable  
CASE,AUTO-UNIT

Line: 1  
UM: EA

Shipping Schedule


Release ID: 1

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

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

Schedule Detail Data

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


CSS-PL-070

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  
Page: 3

7.5.5 Required Ship Schedule Update  
Public Test Progress 91

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

Customer Plan Schedule- Required Quantities

Planning Schedule

Ship-From: 10000      Order: 802077      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 Req: 0.0      Active Start: 01/31/00  
 Prior Cum Date: 01/01/00      Active End:

Schedule Detail Data

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

Resource Authorization Data

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

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

rcrsup.p  
Page: 6

7.5.5 Required Ship Schedule Update  
Public Test Progress 91

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

New RSS Schedule

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 Det
01/31/00	10:00	D	4.0	4	no	no
02/01/00	10:00	D	6.0	4	no	no
02/02/00	10:00	D	6.0	2	no	no
02/03/00	10:00	D	4.0	2	no	no
02/04/00	10:00	D	9.0	2	no	no
02/07/00	10:00	D	2.0	2	no	no
02/08/00	10:00	D	5.0	2	no	no
02/09/00	10:00	D	18.0	1	no	no

CSS-PL-100

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

## Selective Req Ship Sched Update (7.5.6)

**Selective Req Ship Sched Update**

Ship From:  Order:  Line:

Ship To:

Item Number:  UM:

PO Number:

Customer Ref:

Model Year:

Ship Schedule Release ID:

Plan Schedule Release ID:

Sequence Schedule Release ID:

Report: ☐

Update: ☐

Output

Leave unchecked to Preview Changes

Back Next

QAD 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

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

Line 1:

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

Line2:

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

Line 3:

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

Line 4.

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

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

Line 5:

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

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

4 To generate the RSS, enter the following:

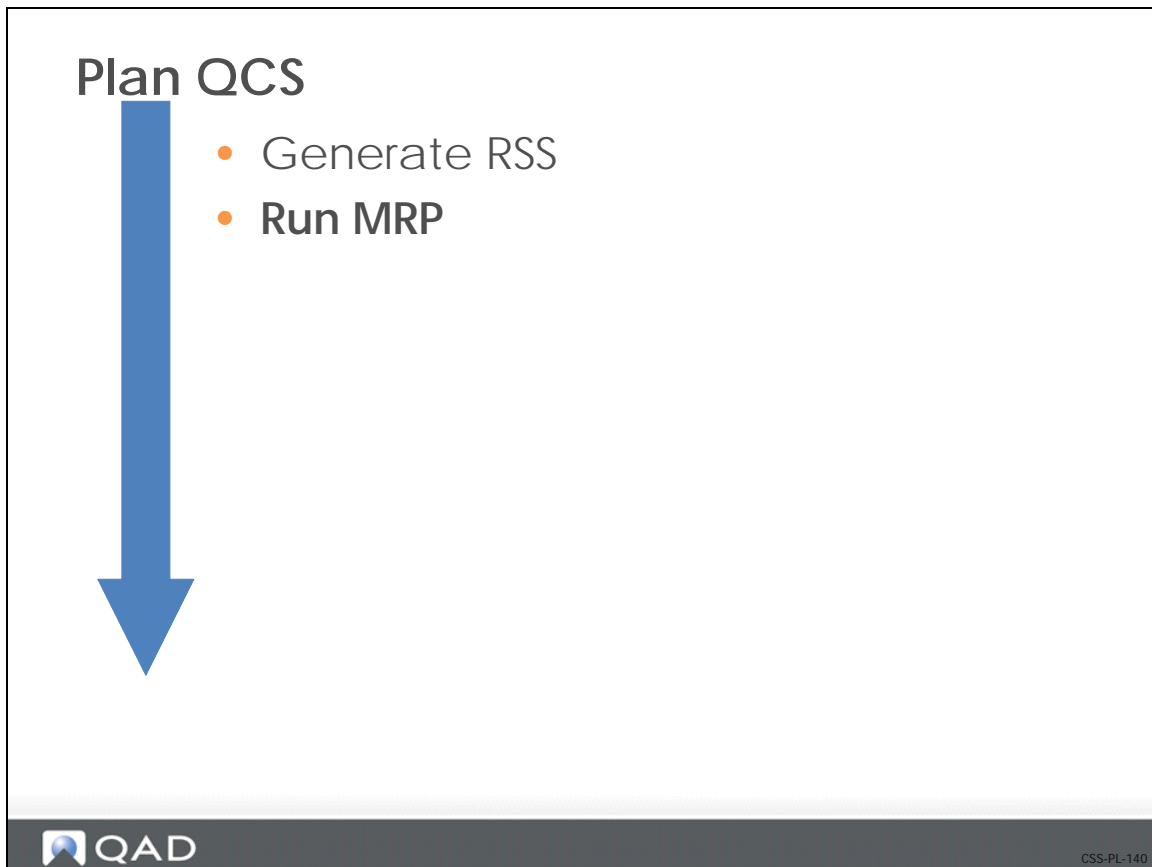
Use Required Ship Schedule Update (7.5.5)

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

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



## Run MRP



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

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

QAD 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)

# MRP Detail Inquiry

MRP Detail Inquiry

Go To Actions Copy Print Preview

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

MECHANICAL PENCIL (5MM) BLISTER PACKED Output: page

Back Next

QAD CSS-PL-160

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

### Selection Criteria


#### Item Number/Site/Start Date

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

## MRP Detail Inquiry: Display

## 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 mrmplq01.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 5

# Shipping

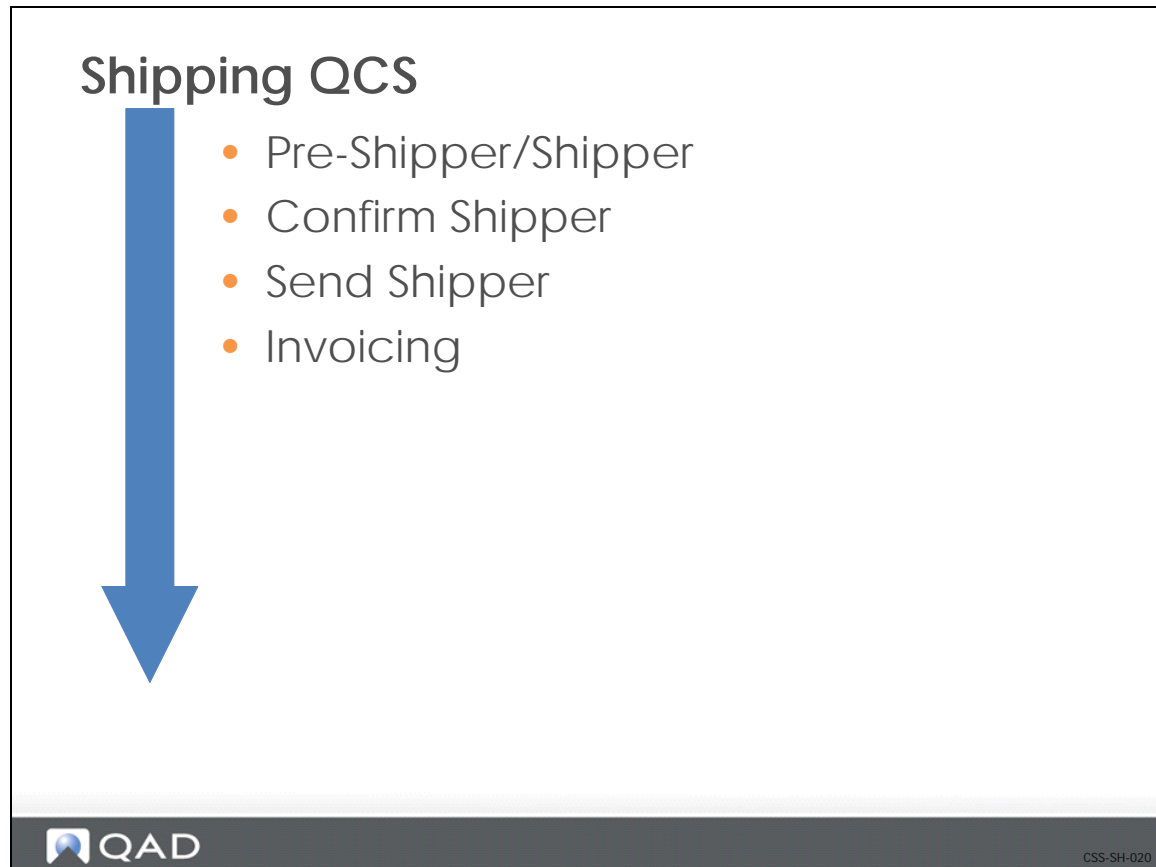
## Shipping QCS

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

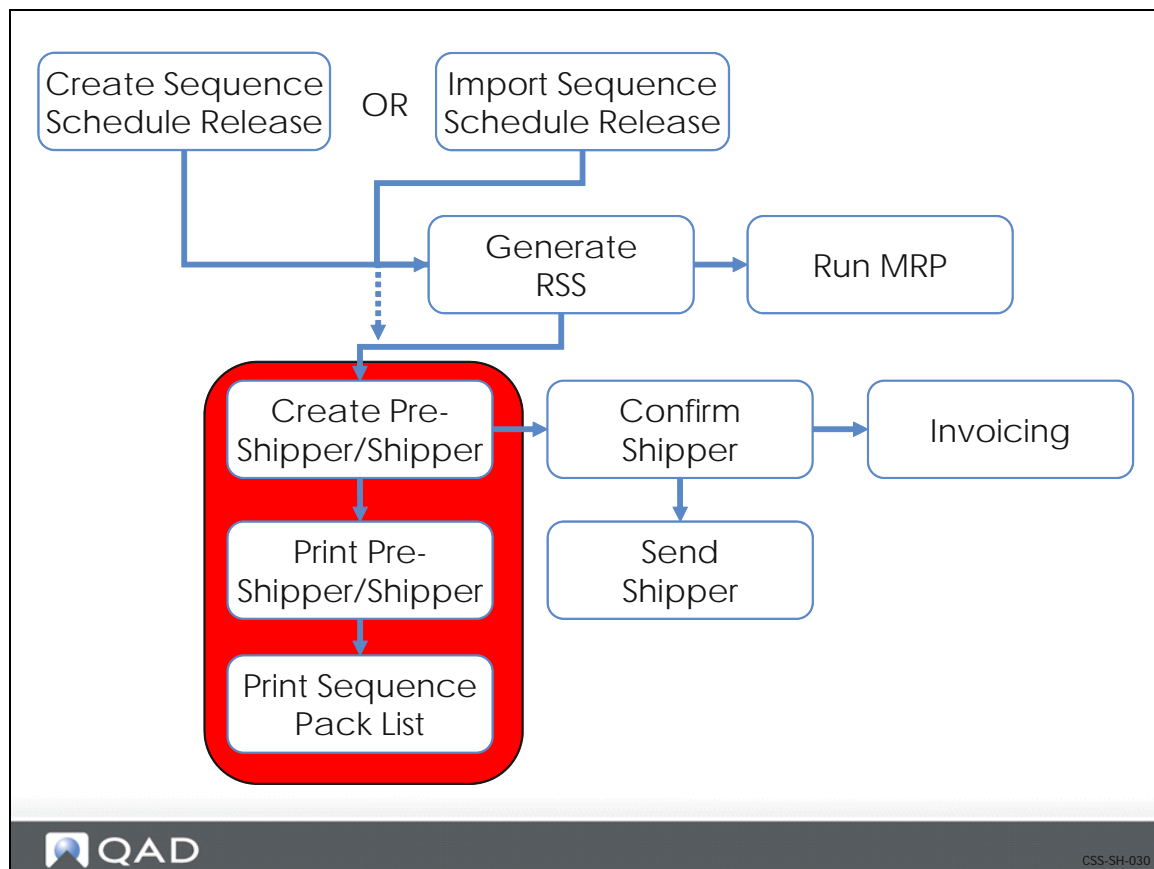


## Shipping QCS



This illustration is a suggested setup sequence of master records for the QCS module which is 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.

## Shipping QCS

### Shipping QCS



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

## Sequence Pre- Shipper - Automatic (7.5.4.10)

## Sequence Pre-Shipper Automatic

Sequence Pre-Shipper - Auto...

Go To Actions Copy Print Preview

Due Date: [ ] : [ ] To: [ ] : [ ]

Ship-To: [ ] To: [ ]

Site: [ ] To: [ ]

Customer Job: [ ] To: [ ]

Customer Sequence: [ ] To: [ ]

Customer Reference: [ ] To: [ ]

Customer Dock: [ ] To: [ ]

Line Feed: [ ] To: [ ]

Status: [ ] To: [ ]

Auto Allocation: ☐

Stage Open Quantities: ☐

Override Partial OK Flag: ☐

Use Containers: ☐

Break on Maximum Sequence: [ 0 ]

Update:

Form Code: [ 1 ]

Break on Maximum Weight: [ 0.00 ]

Break on Maximum Volume: [ 0.00 ]

Include Packing List Comments: ☐

Print Only Lines to Pick: ☒

Print Features and Options: ☐

Print Packing List Comments: ☐

Create Pre-Shipper in SO UM: ☒

Output: [ ]

Batch ID: [ ]

Back Next

QAD CSS-SH-050

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

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

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

## Picklist/Pre-Shipper: Sample Report

# Picklist/Pre-Shipper: Sample Report

Ship To: 01000036

Northwest Reliable  
1000 B StreetCoos Bay  
United States of America

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

Pre-Shipper: P00000288

Page: 1

Print Date: 02/01/00

Customer Dock:  
Line Feed:

Sales Order: so2077

Order Date:

Ship To PO:

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

PO Nbr:



CSS-SH-060

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

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

Print Date: 02/01/00

Packing Order: forward  
Sequences Per Container: 0

Customer Job  
Pack Customer Sequence  
Seq Customer Reference

Customer Dock:  
Line Feed:

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

CSS-SH-070

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

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

## Picklist/Pre-Shipper - Automatic (7.9.1)

### Picklist/Pre-Shipper - Automatic

Go To Actions Copy Print

Due Date:  :

Sales Order:

Ship-To:

Language ID:

Site:

Address List Type:

Item Number:

Reference:

To:

To:

To:

To:

To:

To:

To:

Auto Allocation: ☐

Allocate Components: ☐

Ship Avail Qty for Kit: ☐

Stage Open Quantities: ☐

Override Partial OK Flag: ☐

Use Containers: ☐

Break on Sales Order: ☐

Update: ☒

Break on Maximum Weight:  0.00

Break on Maximum Volume:  0.00

Include Packing List Comments: ☐

Print Only Lines to Pick: ☒

Print Features and Options: ☐

Print Packing List Comments: ☐

Create Pre-Shipper in SQ UM: ☒

Form Code:  1

Output:  
Batch ID:

Back Next

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

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

## Shipper Gateway (7.9.22)

# Shipper Gateway

Shipper Gateway

Process/File: File

File Name:

Load Multiple Containers: ☐

Verify Only: ☐

Output:

Back Next

QAD

CSS-SH-090

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: ESHP000	
Part:	Lot/Serial:	Reference:
Qty: 0	Ship To: 001	Order:
.....		
Kanban:		

Shipper created ESHP000.

Type: i	Site: 17500	Location:
Ship From: 17500	Number:	
Part: item y	Lot/Serial:	Reference:
Qty: 10	Ship To:	Order: so10063
Line: 1	Parent: 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)

**Pre-Shipper/Shipper Workbench**

Go To Actions Copy Print Preview

Ship-From ID: 1000

Pre-Shipper/Shipper: Shipper

Number:

Ship-To/Dock: 00010006

Shipping Group:

Inventory Movement Code:

Leave blank to have system assign number

Back Next

QAD CSS-SH-110

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

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

### Header Frame

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

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

## Carrier Detail Frame

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

Pre-Shipper/Shipper Workbench

Go To Actions Copy Print Preview

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

Ship-To/Dock: 00010006 Customer  
1212 Customer St

Shipping Group:  
Inventory Movement Code:

Carrier: TOL01 Multi: ☐

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

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'.

Level	Order Ln	Item Number	Quantity	UM	Container	Canc B/D
0		Shipper: 1000/00000127	Ship-To: 00010006			

Annotation 1 points to the table header. Below the table is a detailed form for item information, which is highlighted by annotation 2. The form contains the following fields:

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

At the bottom right of the form are three buttons: 'Delete', 'Back', and '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		no	
.1	so100	2	Part 2	3.0 EA		no	
.1	so100	3	Part 3	2.0 EA		no	

**Display Sequence Detail - Order Quantity: 2 EA**

Customer Job: 20090615

Customer Sequence: 001

Customer Reference: 1R001

Customer Dock:

Line Feed:

Date: 6/15/2009 Time: :

Quantity: 1.0 UM: EA

Status: 9000

Customer Build Date:

Volume: 0.0

Comments: ☐

Cancel B/O: ☐

Loc: 100

Type:

ID:

pot, Red

QAD 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 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 the following columns: Level, Order, Ln, Item Number, Quantity, UM, Container, and Canc B/O. The table contains four rows of data:

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	

Below the table, the 'Add Sequences - Order Quantity: 2 EA' frame is open. It contains the following fields:

- Customer Job: [Text Field]
- Customer Sequence: [Text Field]
- Customer Reference: [Text Field]
- Customer Dock: [Text Field]
- Line Feed: [Text Field]
- Date: [Text Field]
- Time: [Text Field]
- Quantity: [Text Field]
- UM: [Text Field]
- Status: [Text Field]
- Customer Build Date: [Text Field]

At the bottom of the frame, there are additional fields: Volume: 0.0, Comments: [Text Field], ID: [Text Field], Loc: 100, Type: [Text Field], and Cancel B/O: [Text Field].



CSS-SH-150

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

- Press the Insert key; the Add Sequences frame displays

## Display Sequence Detail

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

Pre-Shipper/Shipper Workbench

Go To Actions Copy Print Preview

Level	Order	Ln	Item Number	Quantity	UM	Container	Canc	B/O
0	Pre-Shipper: 10000/SH000002 Ship-To: 1001							
.1	so100	1	Part 1	2.0	EA	no		
.1	so100	2	Part 2	3.0	EA	no		
.1	so100	3	Part 3	2.0	EA	no		

.1 Display Sequence Detail - Order Quantity: 2 EA

Customer Job: 20090615

Customer Sequence: 001

Customer Reference: 1R001

Customer Dock:

Line Feed:

Date: 6/15/2009 Time: :

Quantity: 1.0 UM: EA

Status: 9000

Customer Build Date:

Volume: 0.0

Comments: ☐

Cancel B/O: ☐

Loc: 100

Type:

ID:

pot, Red



CSS-SH-160

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

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

## Trailer Information Frame

**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

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

Pre-Shipper/Shipper Workbench

Go To Actions Copy Print Preview

**Print Shipper**

Include Shipper Comments: ☒

Include Packing List Comments: ☒

Print Features and Options: ☐

Print Sales Order Detail: ☐

Assign Shipper Number: ☐

Display Quantity In SO UM: ☐

Company Address: Central

Print Lot/Serial Numbers: ☒

Print Customer Address: ☒

Output:

Delete Back Next

**QAD**

CSS-SH-180

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

## Exercise: Create Daily Pre-Shipper

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

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

Use Sequence Pre-Shipper - Automatic (7.5.4.10).

- 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 the Set Up Sequence Numbers topic of this training guide 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.

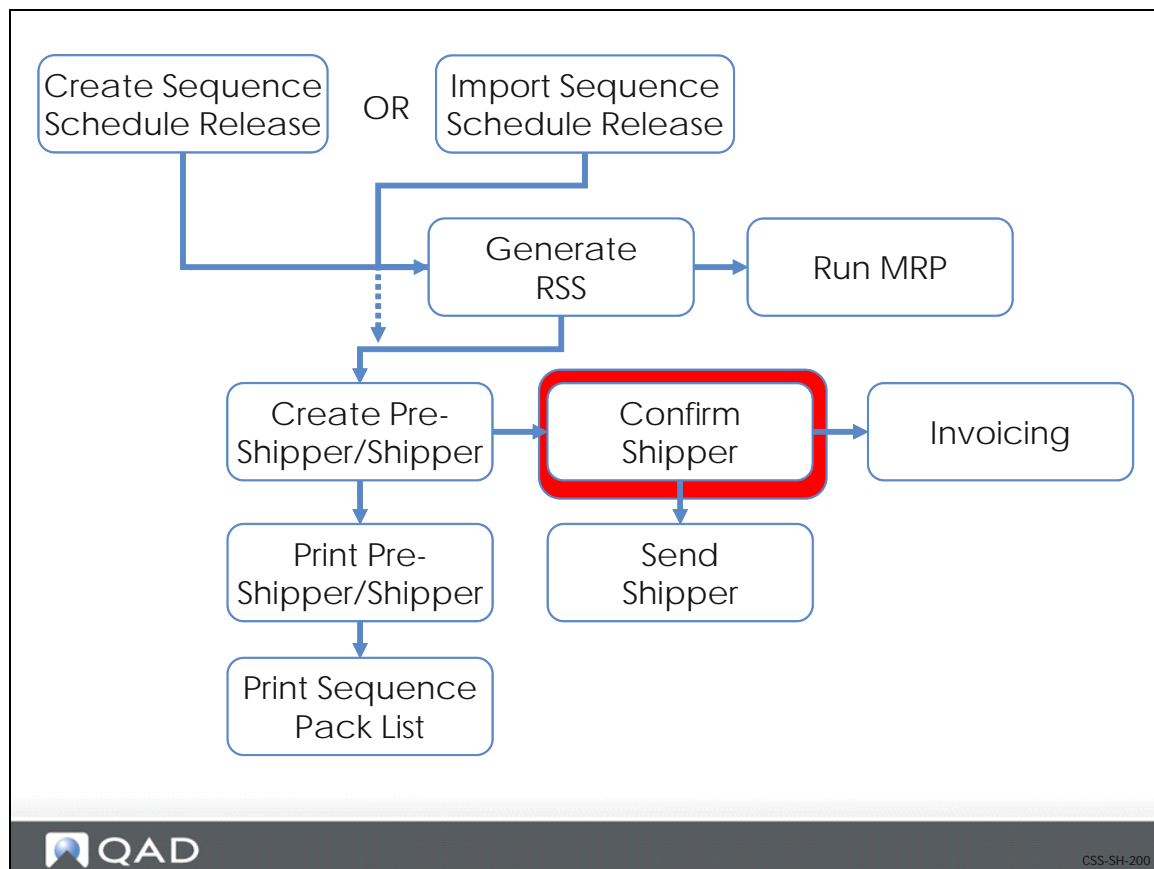
Use Pre-Shipper/Shipper Print (7.9.4), direct output to Page.

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)

**Pre-Shipper/Shipper Confirm**

Ship-From ID: 1000 Main Site

Pre-Shipper/Shipper: Shipper

Number: 00000126

Ship-To/Dock:

Ship Date: 12/29/2008

Effective Date: 12/29/2008

Defaults to system date

Back Next

QAD CSS-SH-220

Use Pre-Shipper/Shipper Confirm to:

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

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

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



## Pre Shipper/Shipper Confirm: Invoice Options

### 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: 1001 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: ☒

Back Next

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

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: INV

Print Header Comment: Optional

Print Line Comment: Optional

Print Line Tax: ☒

Print Description 2: ☒

Print Customer Item: ☒

Output:

Back Next

**QAD** 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:

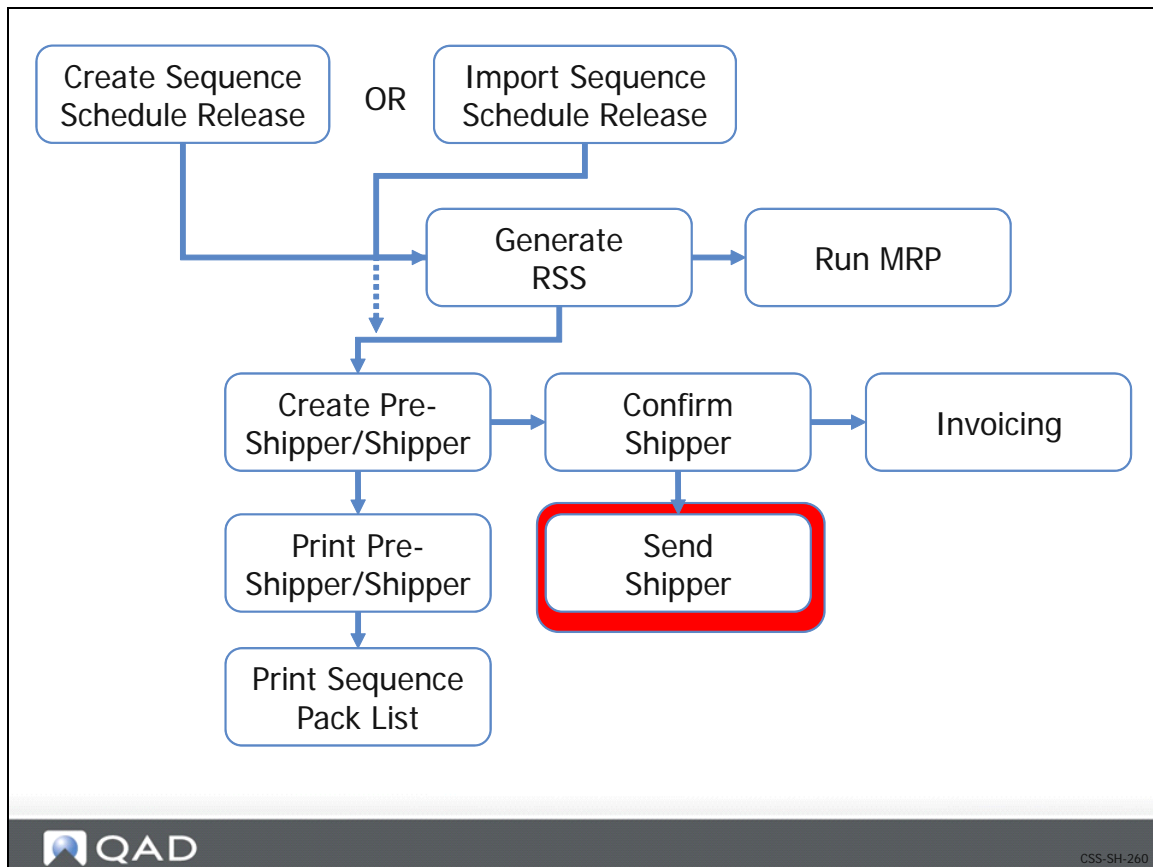
Use Pre-Shipper/Shipper Workbench (7.9.2)

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

Go To Actions Copy Print Preview

Ship-From:

Ship-To/Dock:

Number:

Inventory Movement Code:

Document Format:

Language:

Address List Type:

Carrier:

To:

To:

To:

To:

To:

To:

To:

Print Pre-Shippers/Shippers: Pre-Shipper

Include Printed Pre-Shippers/Shippers: ☐

Print Features and Options: ☐

Assign Shipper Numbers: ☒

Shipper Sequence ID:

Include Pre-Shipper/Shipper Comments: ☒

Include Sales Order Packing List Comments: ☒

Print Sales Order Detail: ☐

Display Quantity In SO UM: ☐

Company Address:

Print Lot/Serial Numbers: ☐

Print Customer Address: ☒

Output:

Batch ID:

Back Next

CSS-SH-280

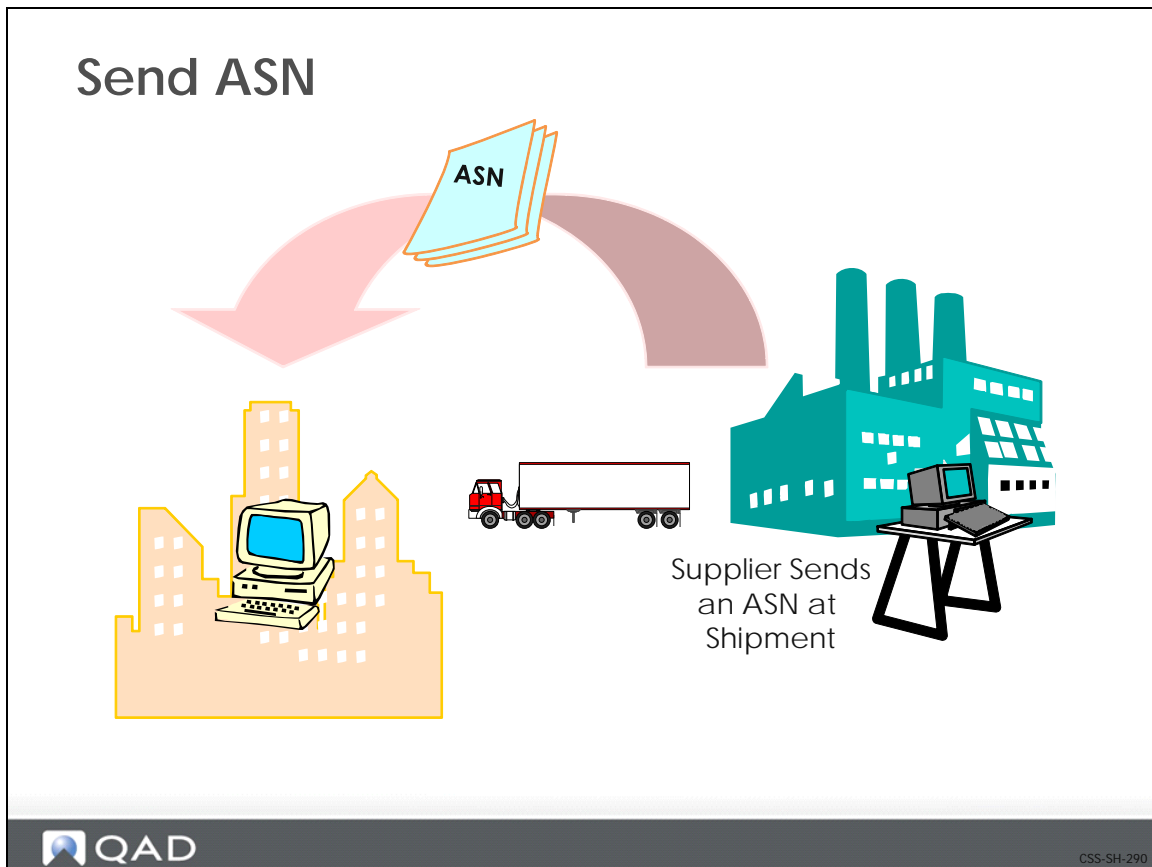
Use Pre-Shipper/Shipper Print to create and print a shipper record.

- Prints separate packing list
  - Can include sequence numbers

The system updates:

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

## Send ASN



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

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

- Sequence Schedule Control (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 flag 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

ShipmentASN Export
Go To ▾ Actions ▾ Copy ▾ Print ▾ Preview ▾

BOL:

Shipper:

Ship-From:

Ship-To/Dock:

Inventory Movement Code:

Ship Date:

To:

To:

To:

To:

To:

To:

☒ Include Confirmed Shippers Only  
☒ Print Details  

Update/Export/Both:

Export

Print Fail/Pass/Both:

Failed

EDI Batch Number:

☒ Show Warning Messages

Output:  
 Batch ID:

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"/>

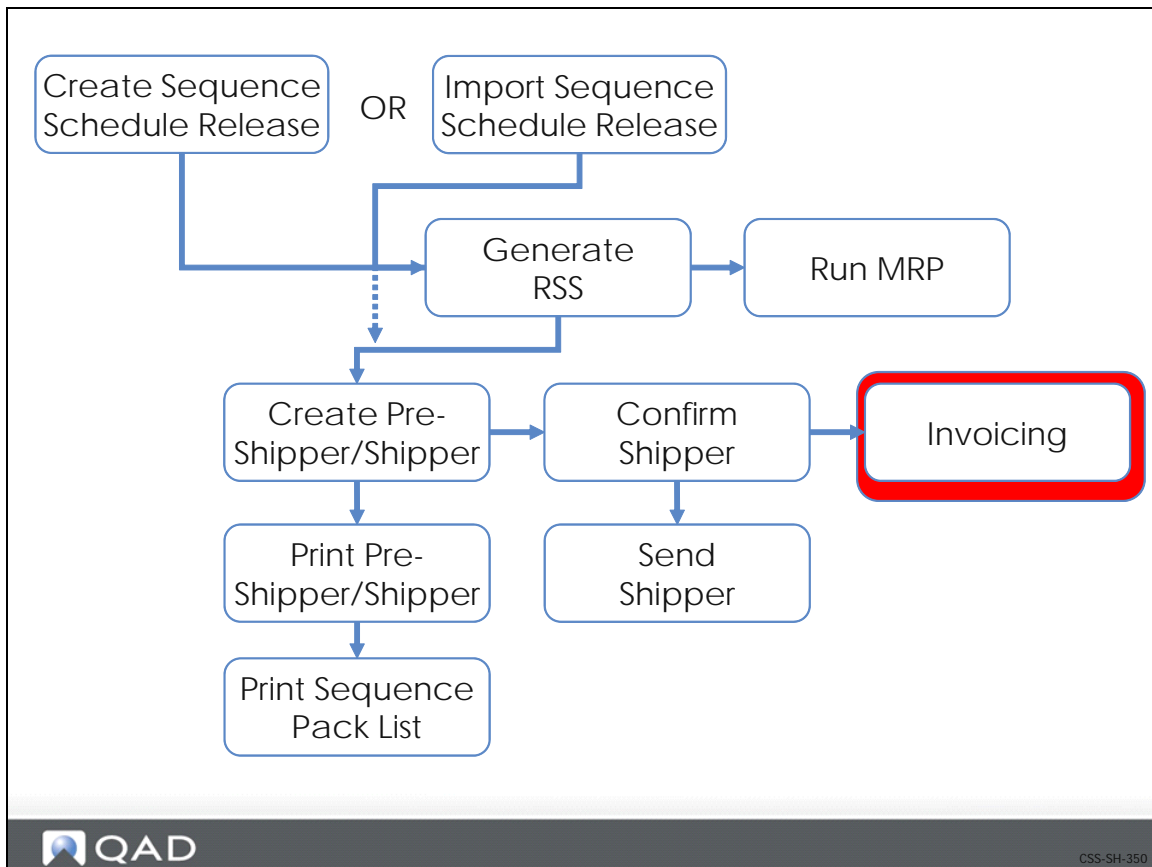
Pre-Shipper/Shipper: 
Output:

Confirmed: ☐
Batch ID:

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

- Allows you to see the shipper's contents

## Invoicing



Confirming the shipper flags the order as ready for invoicing.

QAD 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 6

# 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 (i.e., part) per sequence.

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

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

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

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

## Multiple Delivery Locations

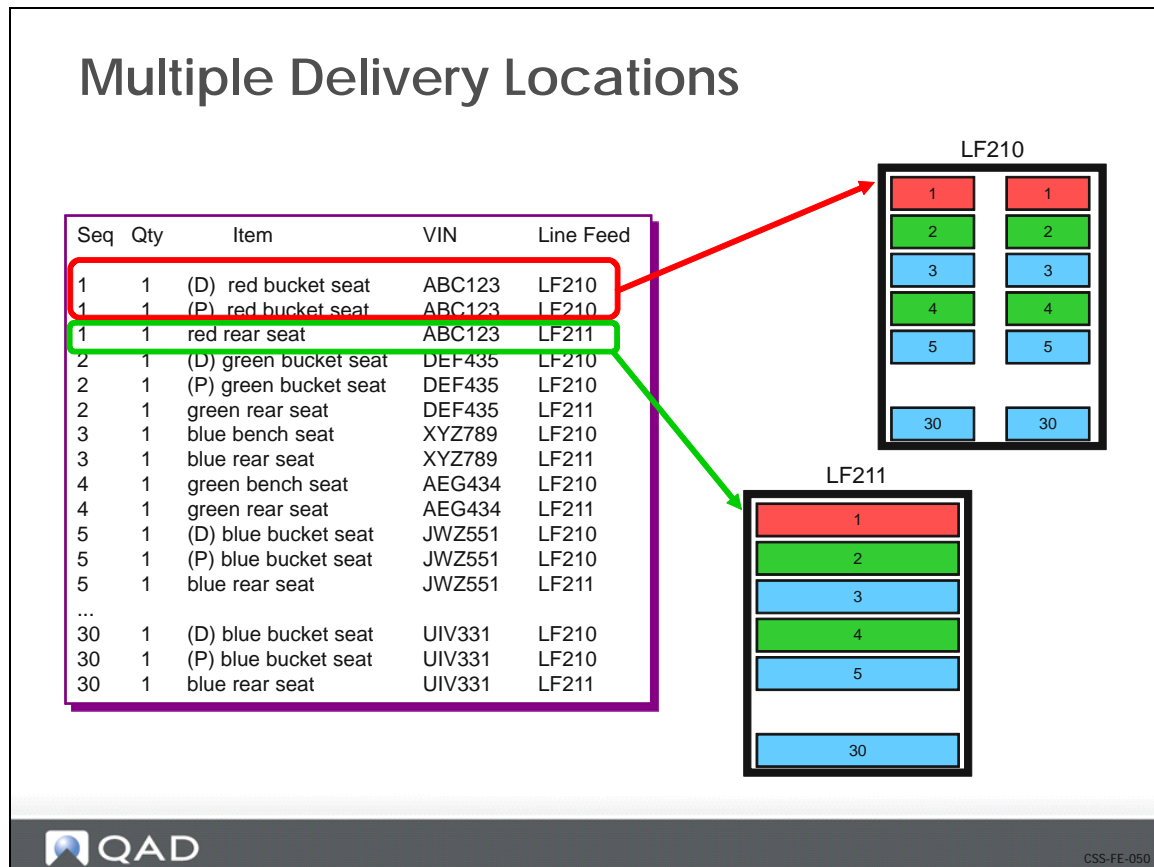
### Features and Options

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



CSS-FE-040

## Multiple Delivery Locations



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

- Customer dock
- Line feed

It is important to understand the customer dock specified on the sequence schedule release is not the same as a customer dock (i.e., dock address) specified on the scheduled order 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 (i.e., 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 (i.e., delete) the record from the database
- Physical delete
  - Use Sequence Schedule Detail Delete (7.5.4.22)
  - Selected sequence records are physically removed from the database

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

- Use Schedule Delete/Archive (7.9.23)

## Sequence Schedule Maintenance (7.5.4.5)

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

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

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

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

## Sequence Schedule Detail Delete (7.5.4.22)

# Sequence Schedule Detail Delete

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

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

☒ Include Deleted Only  
☐ Update

Output: page  
 Batch ID:

QAD
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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





## 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)

# Sequence Schedule Maintenance

Sequence Schedule Maintena...

Go To Actions Copy Print Preview

Ship-From:

Ship-To:

Release ID:

Active: ☐

Create Date:

Cumulative: ☐

Packing Order: Reverse

Sequences Per Container:

Check Sequence Tolerance: ☐

Maximum Tolerance:

Schedule Date Type: Delivery

Active Start:

Active End:

Back Next

QAD

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

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

## Sequence Cross-Ref Maintenance (7.5.4.13)

', 'Shipped: ☐', and 'Shipper ID:'. At the bottom right, there are 'Back' and 'Next' buttons. The QAD logo is in the bottom left corner, and 'CSS-FE-120' is in the bottom right corner."/>

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: 1001

Picked/Shipped Sequence

Shipped Release ID: 01

Shipped Job: 20090615

Shipped Sequence: 001

Shipped Item Number: Part 1

Shipped Reference: 1R001

Shipped Dock:

Shipped Line Feed:

Scheduled Date: Scheduled Time: :

Picked: ☐ Shipped: ☐ Shipper ID:



CSS-FE-130

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

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

## Sequence Cross-Ref Report

Sequence Cross-Ref Report

Go To Actions Copy Print Preview

Ship-From: T40000 To:

Ship-To: 1005000 To:

Release ID: To:

Customer Job: To:

Customer Sequence: To:

Item Number: To:

Customer Reference: To:

Customer Dock: To:

Line Feed: To:

Date: To:

Output:

Batch ID:

Back Next

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

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

7.5.4.14 Sequence Cross-Ref Report  
Public Test Progress 91

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

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

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)

## Cumulative Quantities

**Sequence Schedule Maintenance**

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

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

**Cum Quantity Indicator**

**Sequence Detail Data**

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

**Cum Quantity**

Cum Quantity: 0.0

**QAD** CSS-FE-170

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



Appendix A

# **Manually Create Sequence Scheduler**

## 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.



Appendix B

# **Set Up Sequence Numbers**

## Set Up Sequence Numbers

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

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

Use Number Range Management (36.2.21.1)

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

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

- 3 Add a second segment number by entering:

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

- 4 Add a new sequence number code by entering:

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

- 5 Advance to the Segment List frame and enter:

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

- 6 Add a second segment number by entering:

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

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

- 7 Add a new sequence number code by entering:

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

- 8 Advance to the Segment List frame and enter:

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

- 9 Add a second segment number by entering:

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

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

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

Use Container/Shipper Control (7.9.24)





Appendix C

# **Design and Architecture**

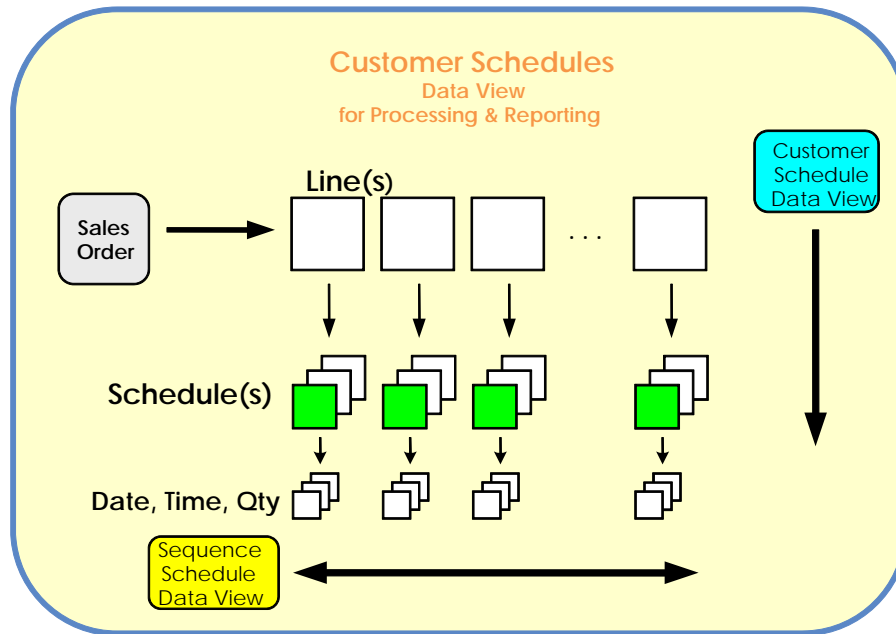
## Design Considerations

### Design and Architecture

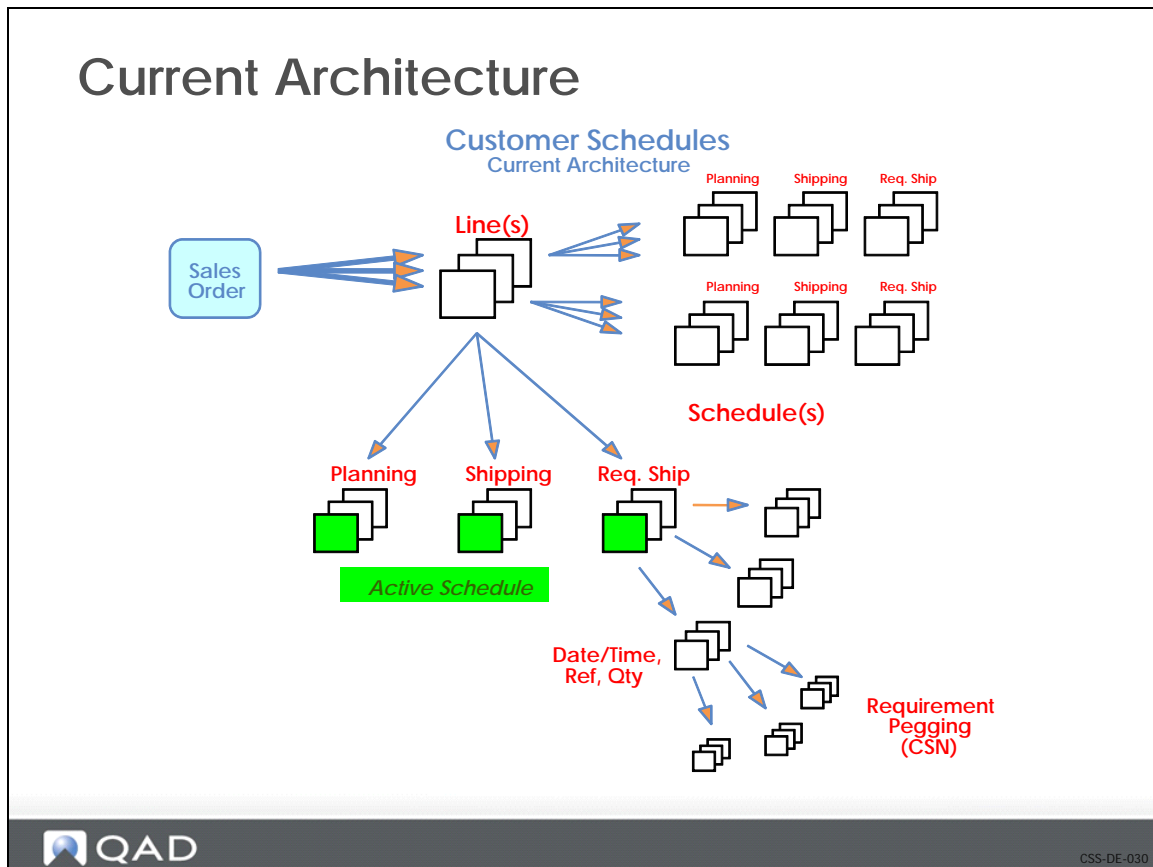
- **Design Considerations**
  - Scheduled Order - Data View
  - Current Architecture
  - New Schedule Type
  - Design Alternatives
  - Design Requirements
  - Selected Architecture
  - E-R (Entity-Relationships) Diagram
  - Schema Diagram
- **Programming Considerations**

## Scheduled Order - Data View

## 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



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Existing schedule types:

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

## Design Alternative

New Type 7

- Creates gap between schedule types

New Type 4

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

New Data Structure

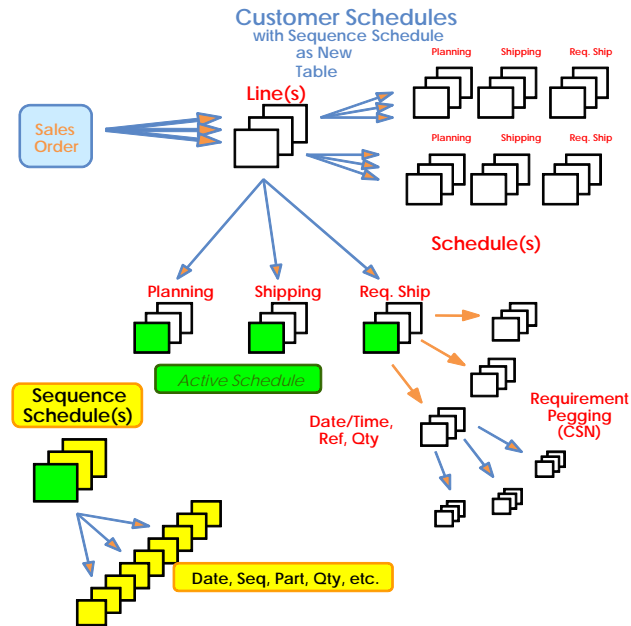
Design Requirements

Physical requirements:

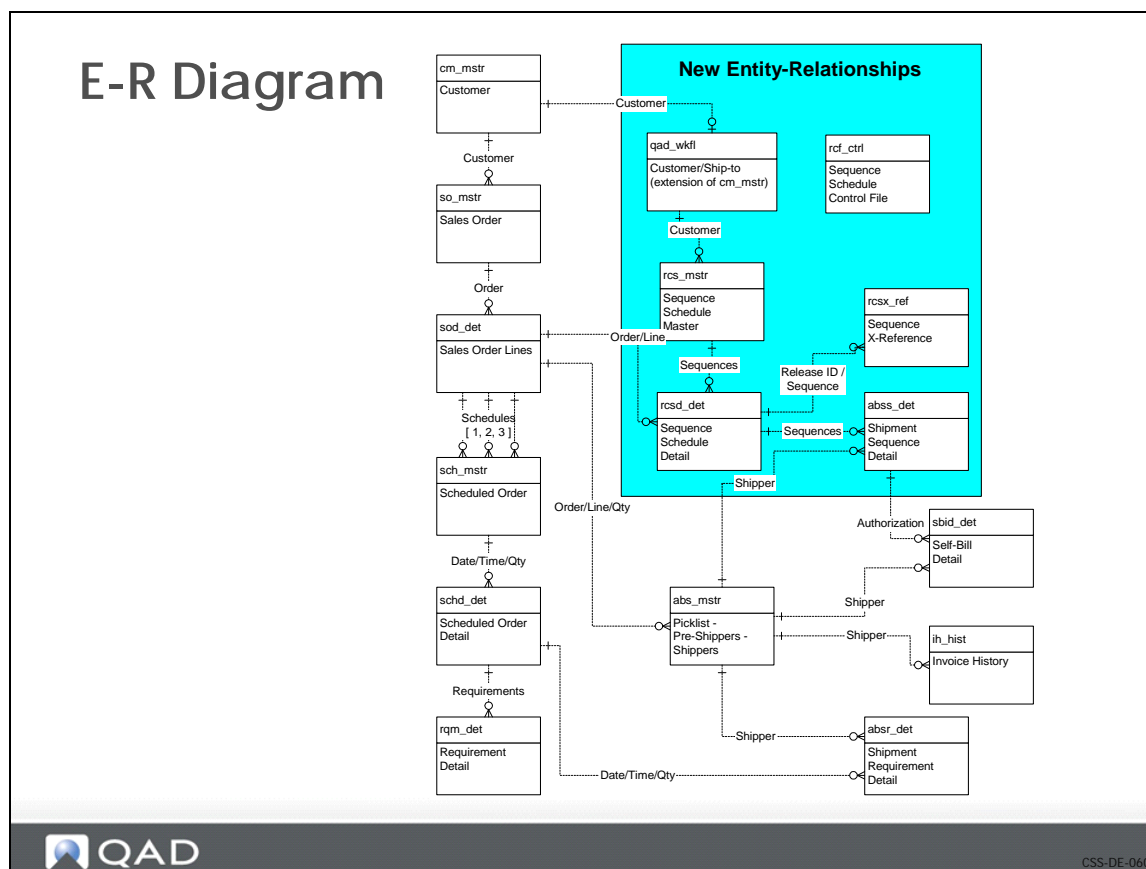
- New fields
  - Job
  - Sequence
  - Dock
  - Line Feed
- New indexes
  - By date/sequence for maintenance
  - By date/item for planning (required ship schedule [RSS])
  - By date/destination/sequence for shipping

## Selected Architecture

## Selected Architecture

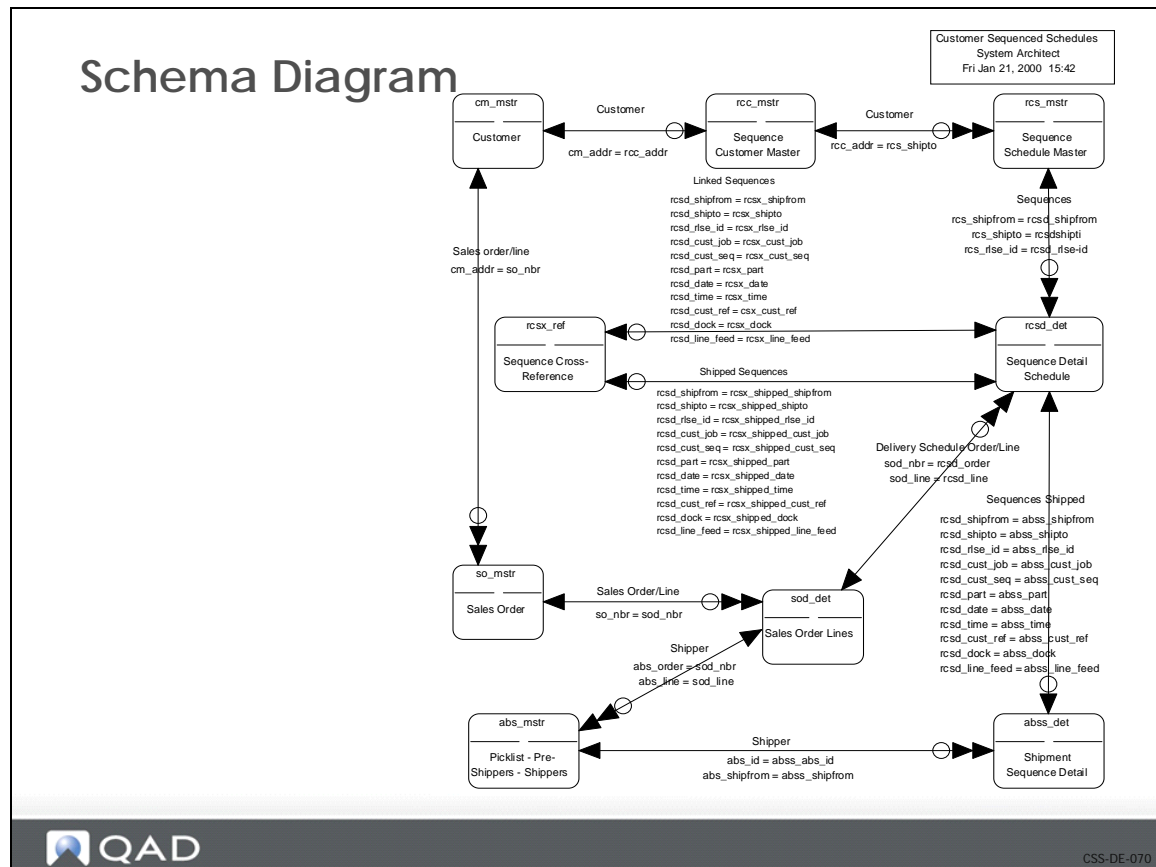


## E-R Diagram





## Schema Diagram



## Programming Considerations

### Design and Architecture

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



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