

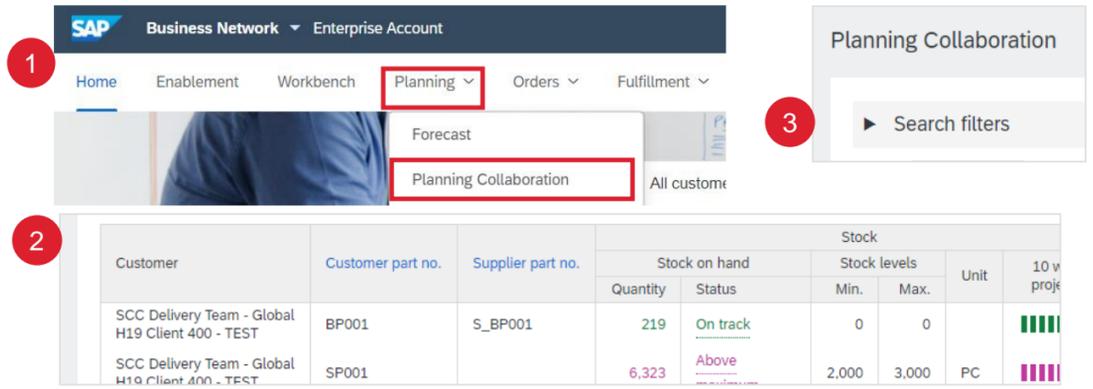
QRG – SMI WITH PLANNED SHIPMENT

In this Quick Reference Guide: **WE EXPLORE SUPPLIER MANAGED INVENTORY WITH PLANNED SHIPMENT**

MAIN SCREEN

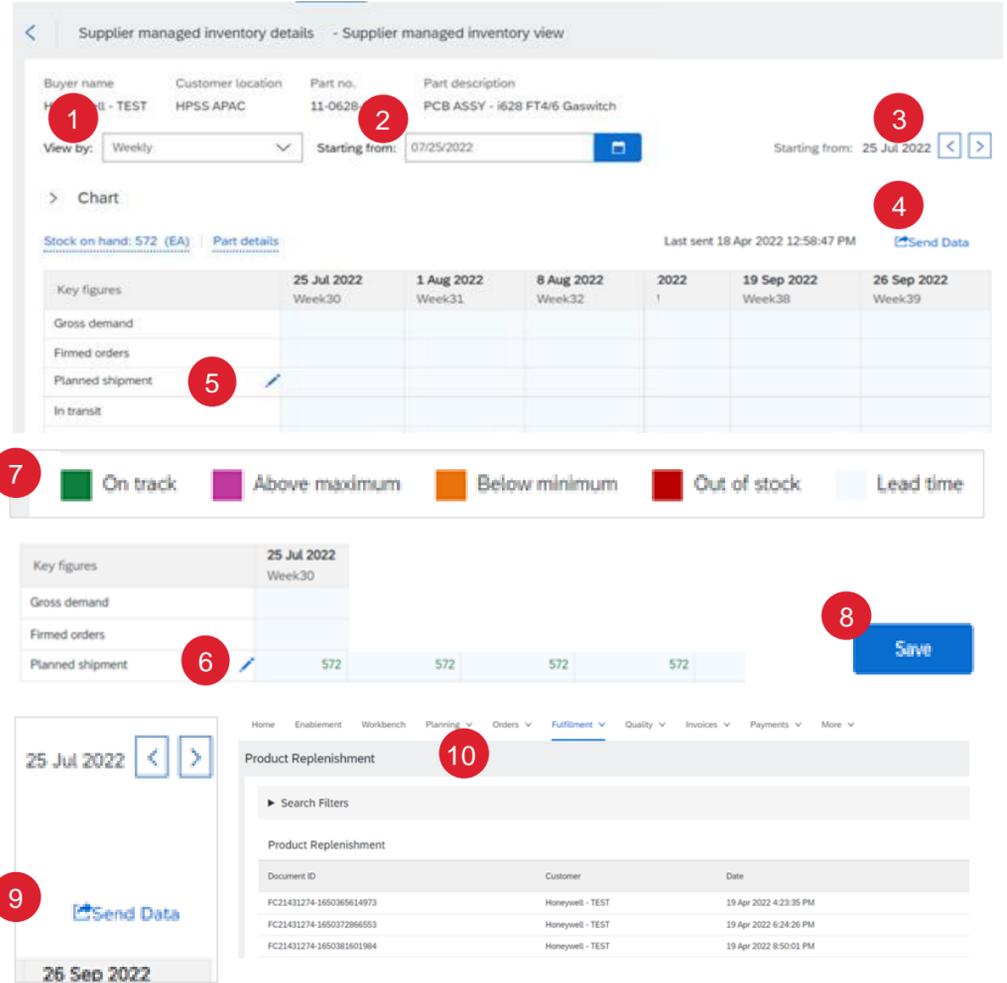
From the Homepage:

1. Click on **Planning > Planning Collaboration**.
2. Screen presents the overall status for all selected materials.
3. Search **filters** help to identify the right item. Expand the section and enter specific search criteria. Specify process type – **Supplier Manager Inventory**.



MANAGE PLANNED SHIPMENTS

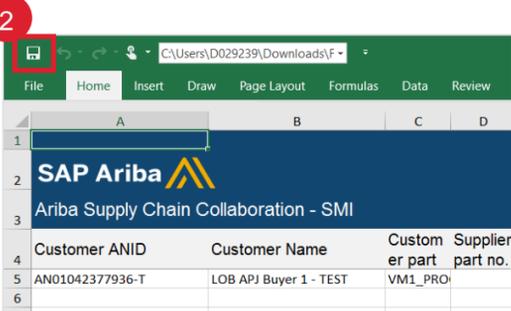
1. Select **View by** in order to choose between different aggregation modes (Daily, Weekly, Monthly, Quarterly, Yearly). The key figures will be summed accordingly.
2. Specify the date in the **Starting from** field.
3. Press the **arrows** to navigate through the time periods.
4. Click **Send data** in order to update the purchase orders in Honeywell ERP based on the entered planned shipments.
5. Click on the **pencil symbol** next to the Supply/Planned shipment key figure to switch to edit mode in order to be able to enter the planned shipments/supply elements per time bucket.
6. Pressing the **pencil symbol** allows you to enter planned shipments in the planned shipment key figure. Typically, the value will lie between the minimum and maximum proposals.
7. Color coding reference to refer health of stock
8. Press **Save** button.
- Note:** Save will *not* share the entered data with the customer but will only trigger a recalculation of the projected stock and save the planned shipment quantities for future adjustments.
9. Click on **Send data** icon on top of the key figures table to send the data to customer's backend system. A message will appear confirming successful transmission of data. Click **OK**
10. In the **Fulfillment** (under **Product Replenishment** sub-tab), you can doublecheck the generated product replenishment cXML.



EXCEL USER INTERACTION – UPDATE & UPLOAD EXCEL FILE

1. Enter the planned shipment data in the respective time bucket/column in the **light blue colored row** of the Excel sheet.
2. When finished **save** the file for later upload.

Manufaturing	Stock on hand	Minimum Stock	Maximum Stock	Minimum Stock m days	Maximum Stock m days	Unit	Planned acceptance	Key figures	24 Sep 2018	1 Oct 2018	8 Oct 2018	15 Oct 2018	22 Oct 2018	29 Oct 2018	5 Nov 2018	12 Nov 2018
	1020	200	500			EA		Gross demand			500					380
								Net demand								
								Order								
								Planned shipment								
								In transit	0	0	0	0	0	0	0	0
								Target stock								
								Projected stock	1020	520	520	520	520	140	140	
								Minimum stock	-820	-320	-320	-320	-320	60	60	
								Maximum stock	-520	-20	-20	-20	-20	360	360	
								Shipments								
								Receipts								
								Days of supply	10	4	8	7	6	0	4	



From the Upload/Download screen:

1. Click on **Uploads** sub-tab
2. Press **Upload** button. Pop-up window will appear.
3. Enter a meaningful job name
4. Select Type **Inventory**
5. Browse / Choose / Open file > select required excel sheet.
6. Press **Upload** button.
7. Click on the **Log** icon and open the spreadsheet. The spreadsheet reports errors or issues.

