

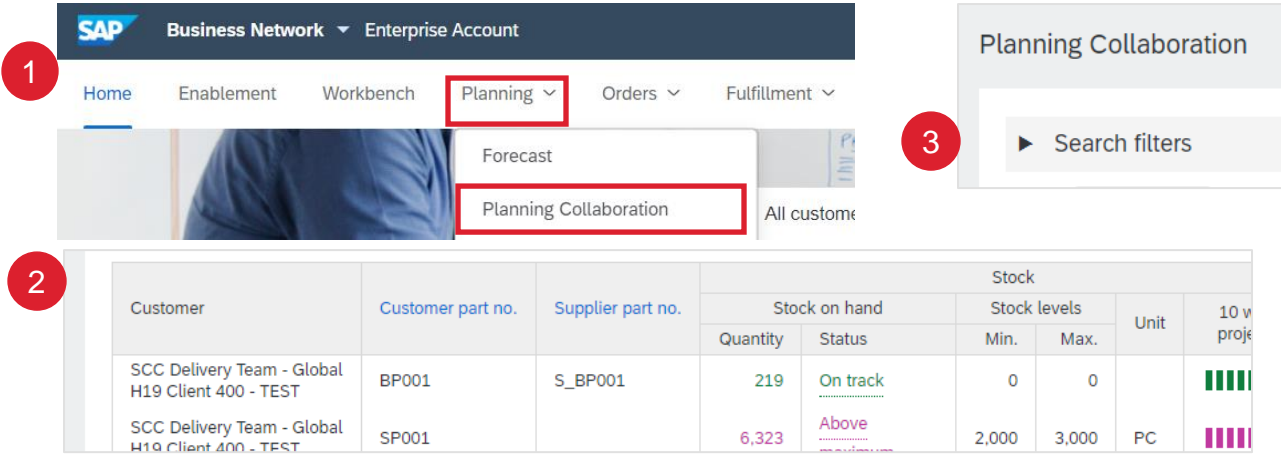
QRG – SMI WITH PLANNED SHIPMENT

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

MAIN SCREEN

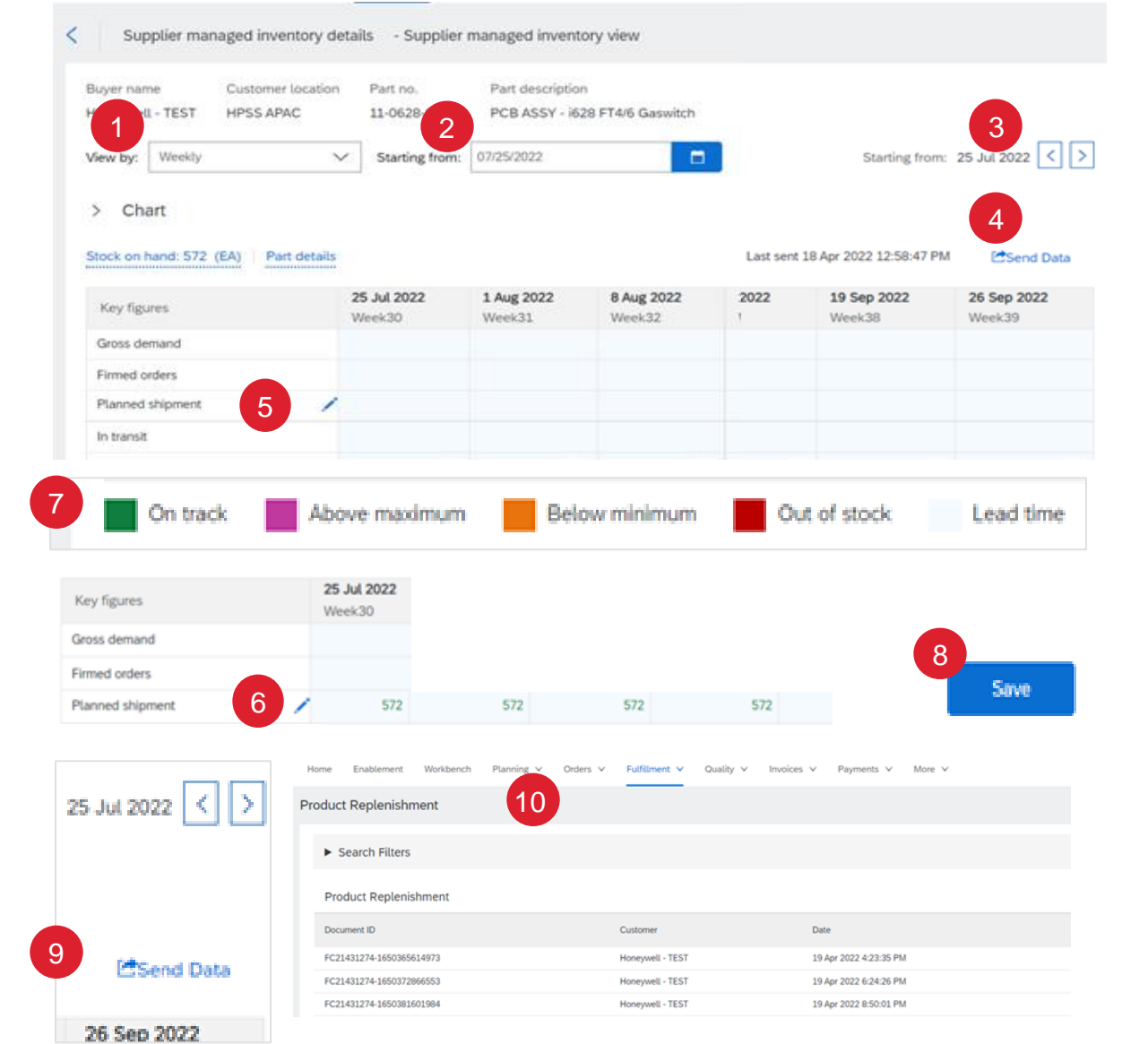
From the Homepage:

- 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

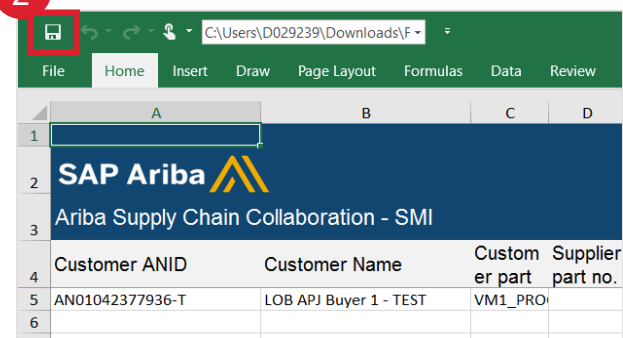
- 1. Select **View by** in order to choose between different aggregation modes (Daily, Weekly, Monthly, Quarterly, Yearly). The key figures will be summed accordingly.
- 2. Specify the date in the **Starting from** field.
- 3. Press the **arrows** to navigate through the time periods.
- 4. Click **Send 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.

	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF
Manufaturing	on hand	1020	200	500												
Stock	on hand	1020	200	500												
Minimu	m Stock															
Maximu	m Stock															
Minimu	m days															
Maximu	m days															
Unit		EA														
Planned acceptance																
Key figures																
Gross demand																
Net demand																
Order																
Planned shipment																
In transit																
Target stock																
Projected stock																
Minimum stock																
Maximum stock																
Shipments																
Receipts																
Days of supply																



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.

