



Unit 7 – Inventory

*Transaction Posting
Transaction Enquiry
Inventory Planning
Inventory Planning Enquiry*

Sample Documentation

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7.0 Inventory

7.1 Introduction

The Inventory Planning application supports the management of inventory levels in a variety of scenarios. The basis of the application is the ability to define an unlimited number of inventory (stock-holding) locations – whether physical sites or logical grouping of inventory in a place or state. Transactions and balances relating to items in these locations may be created by other Wesupply applications such as Delivery, reflecting the fulfilment activities managed by those applications. Alternately, transactions may be loaded through an interface from an external system - such as a third-party warehouse management system - or maintained manually. Inventory Planning may therefore be used in conjunction with other Wesupply applications, or deployed on it's own as a means of sharing inventory availability information in a company, trading network or industry.

Functions

- Unlimited stock locations may be defined.
- Transactions processed in the Delivery Manager can give rise to Inventory transactions
- Data filtering controls permit access to stock information to be limited by user.
- Inventory shipments/deliveries may be planned. The system may be operated either in 'human decision' mode where the supplier decides what to ship based on the information presented, or can be configured to calculate the recommended shipment dates and quantities.
- The system calculates the minimum and maximum stock balances dynamically bases on the forecast usage of each item.
- For each fulfilment method, supplier and delivery point, the user can determine what inventory updates are to be performed at Ship Confirmation and Receiving. Balances available for update are Good Stock, Inspection Stock, In-Transit to warehouse and In-Transit from Warehouse.
- Enable the user to specify whether the forecast for a planned item represents the expected/required shipments into the warehouse or the consumption out of the warehouse.
- Configure the chart and table to include or omit certain calculations.
- Allow an economic order quantity to be defined.
- Enable the user can override the recommended shipments on the graph panel.
- Inventory Transaction Posting allows manual entry of transactions including Opening Balance and Balance Adjustment.
- Transactions from an external system may be posted to the Inventory Manager.
- Inventory Transaction extracts may be created and downloaded.
- Inventory Enquiry allows information to be obtained by item, supplier, warehouse.
- Displays the initial inventory level (prior to consumption by past due forecast) in the graph.
- User control on how the PO number (for receipts) is to be derived, entered at network rule level.

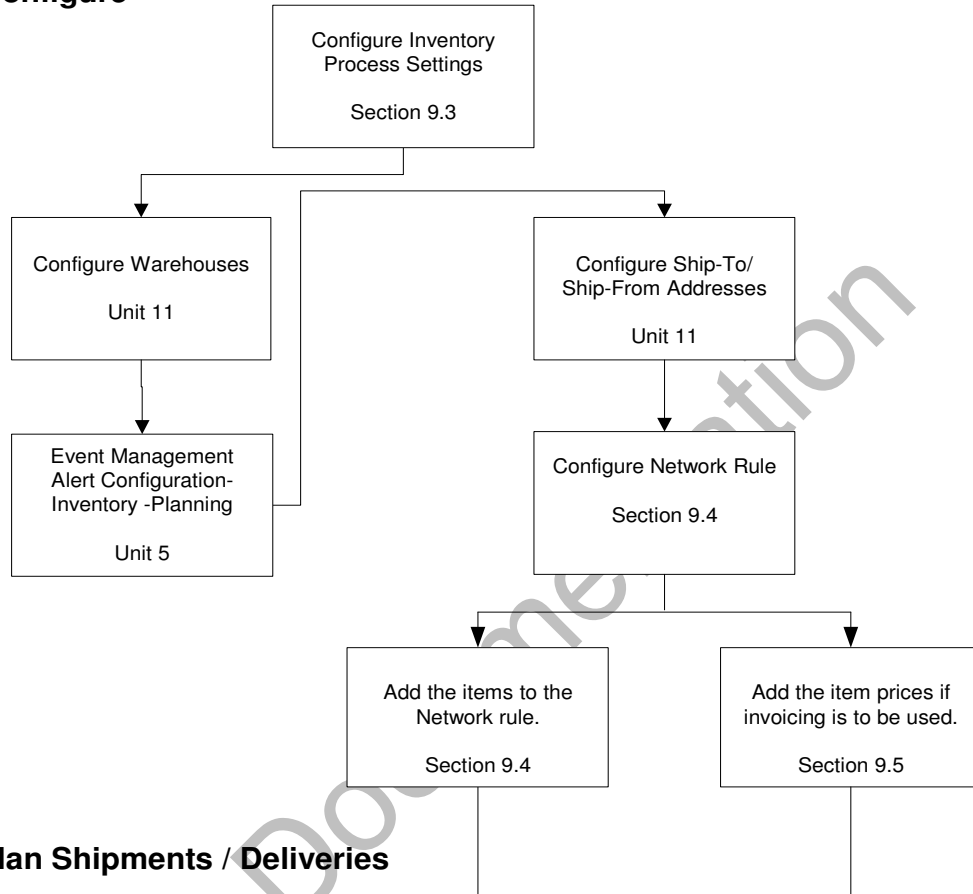
Features

- 'Alert' messages are generated for items where the stock level is approaching the minimum balance.
- Alert messages can be supplemented with E-Mails to user-defined personnel at both customer and supplier if the message is not acknowledged within a user-defined period.
- Inventory balances may be held at up to three levels of detail: item/warehouse, item/supplier/warehouse, item/supplier/despatch point/warehouse.

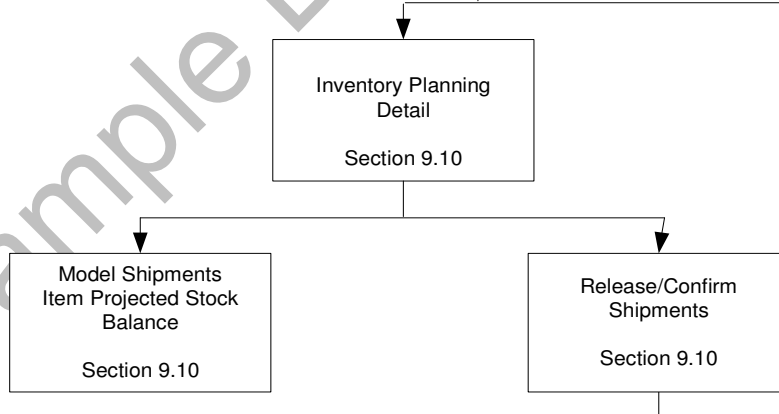
Sample Documentation

7.2 Inventory Planning Process Steps

Configure



Plan Shipments / Deliveries



Enquiry



7.3 Configuration Settings – Inventory Planning

Access and Availability

Accessed by clicking Settings, Inventory Planning from the Configuration tab.

Inventory planning - Amend Last refreshed: 11:36:23 06/05/2003

Customer: CUSTOMER Ship to: All
 Supplier: All Ship from: All

Processing options

- Create shipments or inventory transactions only: Full Shipment
- Automatically confirm generated shipments: Never
- Calculate recommended shipments: No
- Update existing planned shipments (default): No
- Maximum recommended shipments per item (default): 1

Shipment list options

- Display contract number: No
- Display item description: No
- Display maximum balance: Yes
- Display quarantine stock: Yes

Past usage graph options

- Past usage period length: Daily
- Past usage number of periods: 30
- % Forecast discrepancy to highlight: 5000

Forecast usage graph options

- Forecast usage period length: Daily
- Forecast usage number of periods: 30
- Display planned shipments: Table and graph
- Display planned deliveries: No
- Display system recommended shipments: Table only
- Display system recommended deliveries: No
- Display total planned + system recommended shipments: No
- Display user override shipments: Table and graph
- Display user override deliveries: No
- Display current forecast: No
- Display previous forecast: No
- Display previous/current forecast comparison: No

Buttons: Save, Save & return, Refresh, Cancel

Function

- These entries allow the user to configure the default settings for Inventory planning.
- Configure default settings at Customer level and/or Customer/Ship to/Supplier/Ship from level.

Panel Entries

Processing Options:

Create shipments or inventory transactions only	Select Full Shipment to create a Wesupply Ship Instruction when a supplier performs an inventory planned shipment confirmation. Select Inventory Transaction only if the shipment confirmation process is to only create Inventory Transactions.
Automatically confirm generated shipments	Select from the drop down list. You may choose from Never, Always, User choice 'default of No' which defaults the setting to No but allows the user to override when releasing the shipment. User choice 'default of Yes' which defaults the setting to Yes but allows the user to override when releasing the shipment.
Calculate recommended shipments	Select Yes or No if Wesupply is to calculate recommended shipments. Calculations are based on: On-hand, min and max inventory balances. Forecast requirements. Calendar entries.
Update existing planned shipments (default)	Select Yes or No from the drop down list if you want Wesupply to update existing planned shipments.
Maximum recommended shipments per item (default)	Specify 1–99 the default number of recommended shipments allowed per item.

Shipment list options:

Display contract number on Inventory planning panels	Select Yes or No from the drop down list.
Display item description	Select Yes or No from the drop down list.
Display maximum balance	Select Yes or No from the drop down list.
Display quarantine stock	Select Yes or No from the drop down list.

Past usage graph options:

Past usage period length	Select the past usage period length from the options in the drop down box. Choose from Daily, Weekly, Monthly, Four Weekly.
Past usage number of periods	Enter the number of periods required for past usage.
% Forecast discrepancy to highlight	Enter the percentage figure outside which actual usage to forecast discrepancies will be highlighted.

Forecast usage graph options:

Forecast usage period length	Select the forecast usage period length from the options in the drop down box. Choose from Daily, Weekly, Monthly, Four Weekly.
Forecast usage number of periods	The number of periods required for forecast usage
Display planned shipment/deliveries Display system recommended shipments/deliveries Display total planned + system recommended shipments Display user override shipment/deliveries Display current/previous forecast Display previous/current forecast consumption.	Valid values are: No – do not display relevant data. Table only – display relevant data in the table only. Table and graph – as a default display the relevant data in the table and on the graph.

7.4 Configure Network Rule for Inventory Planning

7.4.1 Network Rule – List

Access and Availability

Accessed by clicking Network rule from the Configuration tab.

Search

Network rules Last refreshed: 11:02:45 30/04/2003

Search Results

Supplier: All

Fulfilment Method: All

Ship to: From or Equal To To:

Ship from:

From Warehouse:

To Warehouse:

Ordered: Ship to, Supplier, Ship from

Maximum number of rows: 18

Go

Results

Network rules Last refreshed: 10:54:18 12/05/2003

Ship to	Supplier	Default method	To warehouse	From warehouse
C02	88614	Inventory planning		
3373958	C02	S.I.		
3555315	C02	S.I.		

Search Add Previous page Next page Refresh

Amend
Copy
Delete
Items

Function

- The Network Rules Search panel provides the user with the facility to enter specific selection criteria.
- To maintain the supply chain nodes from the results panel.
- To **add** or **amend** default settings relating to a Network Rule.
- To **copy** default settings from an existing network rule.
- To **delete** a network rule and related items.
- To **add/maintain item** details relevant to a network rule.

7.4.2 Add / Amend a Network Rule for Inventory Planning

Access and Availability

Accessed by selecting Network rules from the Configuration menu tab.

Network rule - Amend Last refreshed: 14:18:40 06/05/2003

Ship to Supplier 0880 - Midlands LA Location lalsupp1 - LAL1 Supplys Ltd	Ship from LAL1 Supplys Ltd	Default fulfilment method Inventory planning
Default To warehouse (None)	Default date basis Shipment	Default from warehouse (None)
Default price source Price list	Invoice timing Accepted	Weight unit of measure Kilos
Default quantity unit of measure Each	Carrier (None)	Recommended shipment horizon 1 (Inventory planning only)
Volume unit of measure Metres	Override corporate invoice A/c to (None)	Override corporate invoice A/c from (None)
Round requirements to container quantity Yes (Inventory planning only)	Calculation method for minimum balance Dynamic	Calculation method for maximum balance Fixed
Default recommended shipment calculation Replace consumption	Default consumption calculation period (days) 14	PO link method Interface to determine
Forecast type Replenishment of warehouse		

Activate load management

When shipment capacity exceeded: []

Weight capacity (Kilos): 0.000 Volume capacity (Metres): 0.000

Lead Time to shipment
 Lead Time specified here: []

Lead time to shipment (days): [1] Lead time to shipment (hours): [0]

Delivery lead time (days): [0] Beginning or end of day: Beginning End

Delivery lead time (hours): [0]

Milestone group: [None]

Method	Event	From warehouse		To warehouse			Auto receive	Price date basis	Quantity to invoice
		Good stock	In-transit	In-transit	Good stock	Inspection			
S.I.	Ship confirm	-	+	+			No	Order	Received-rejected
S.I.	Receiving		-	-	+				
Kanban	Ship confirm	-	+	+			No	Order	Received-rejected
Kanban	Receiving		-	-	+				
Inventory planning	Ship confirm	-	+	+			No	Order	Received-rejected
Inventory planning	Receiving		-	-	+				
External	Ship confirm	-	+	+			No	Order	Received-rejected
External	Receiving		-	-	+				

Save Refresh Cancel

Function

- To maintain the transaction rules that will apply to the inventory movements within the supply chain network.

Panel Entries

Default Fulfilment Method	Select Inventory planning from the drop down list to display Inventory planning against the Fulfilment Method for this Network Rule on the Fulfilment Network Rules List.
Default Date basis	Select Shipment or Delivery .
Default To Warehouse Default From Warehouse	Specify the default To or From Warehouse location. Choose from the drop down list. Note: The warehouse must already be configured.
Default Price Source	Specify the default pricing source for the network rule.
Invoice Timing	Select Ship Confirm , Arrived or Accepted from the drop down list to default at what point you want Wesupply to generate self bill invoices.
Default Quantity unit of measure	Select the default UOM from the drop down list.
Weight unit of measure	Select the default weight from the drop down list.
Volume unit of measure	Select the default volume from the drop down list.
Carrier	Linked to third parties previously configured. Select from the drop down list.
Round requirements down to container quantity	Select Yes or No from the drop down list or all items added to this network rule.
Recommended shipment horizon	Enter the number of days for the recommended shipment horizon.
Override Corporate Invoice A/c To	Key in the override to corporate invoice account number which is to be used as the default for self bill invoicing if required.
Override Corporate Invoice A/c From	Key in the override from corporate invoice account number which is to be used as the default for self bill invoicing if required.
Calculation method for minimum balance	Select from the drop down box. Choose from Fixed , or Dynamic .

Calculation method for maximum balance	Select from the drop down box. Choose from Fixed , or Dynamic .
Default recommended shipment calculation	Select from the drop down list.
Default consumption calculation period (days)	Enter the number of days as the default consumption period.
Forecast type	Select from the drop down list. Choose from Replenishment of warehouse or Consumption from warehouse .
PO link method	Select which method you wish the PO to be linked. Choose either Interface to determine or Item fulfilment details .
Activate load management	Select to tick the box for Yes or leave blank for No . If yes, the following fields become available to the user.
When shipment capacity exceeded Weight capacity (kilos) Volume capacity (Metres)	Choose either Create shipment for same time slot or create/add the shipment from the next time slot . Enter the weight capacity. Enter the volume capacity.
Lead Time to shipment	Select from the drop down list. Choose from same day or lead time specified here .
Lead Time to shipment (days)	If the previous option is set to lead time specified here enter the lead time to shipment in days . Or
Lead Time to shipment (hours)	If the previous option is set to lead time specified here enter the lead time to shipment in hours .
Delivery lead time (days)	Enter a delivery lead time in days if required.
Beginning or End of day	If the delivery lead time (days) is entered then also specify the default delivery setting. Choose for Beginning or End of day. Or
Delivery lead time (hours)	Enter a delivery lead time in hours if required.
Milestone Group	Select from the list the milestone group that your wish this network rule to monitor. Note: Milestone groups must be configured.

7.4.3 Copy a Network Rule for Inventory Planning

Access and Availability

Accessed by selecting Network Rule, Results from the Configuration menu tab.

Network rules					Last refreshed: 10:54:18 12/05/2003
Search		Results			
Ship to	Supplier	Default method	To warehouse	From warehouse	
C02	88614	Inventory planning			
3373958	C02	S.I.			Amend
3555315	C02	S.I.			Copy
					Delete
					Items

Search Add Previous page Next page Refresh

Network rule - Copy		Last refreshed: 11:03:26 12/05/2003	
Customer	CUSTOMER		
Ship to	0880 - Midlands LA Location		
Supplier	lalsupp1 - LAL1 Supplys Ltd		
Ship from	LAL1 Supplys Ltd		
Confirm Refresh Cancel			

Function

- To copy an existing network rule and related items.

7.4.4 Delete a Network Rule for Inventory Planning

Access and Availability

Accessed by selecting Network Rule, Results from the Configuration menu tab.

Network rules					Last refreshed: 10:54:18 12/05/2003
Search		Results			
Ship to	Supplier	Default method	To warehouse	From warehouse	
C02	88614	Inventory planning			
3373958	C02	S.I.			
3555315	C02	S.I.			

Amend
Copy
Delete
Items

Search Add Previous page Next page Refresh

Network rule - Delete		Last refreshed: 09:53:21 06/05/2003	
Warning: all items linked to this network rule will also be removed.			
Delete existing shipping instructions for items fulfilled by shipping instructions?			<input type="checkbox"/>
Delete existing forecast?			<input type="checkbox"/>
Delete existing Kanban cards for Kanban items?			<input type="checkbox"/>
Confirm		Cancel	

Function

- To **delete** a network rule and related items.
- Optionally, the network rule deletion process will remove the existing Ship Instructions for the item, remove the existing forecast and/or delete existing Kanban cards for Kanban items.

7.5 Item Maintenance for Inventory Planning

Access and Availability

Accessed by selecting Network Rule, Results from the Configuration menu tab.

Network rules						Last refreshed: 09:47:56 06/05/2003
Search		Results				
Ship to	Supplier	Ship from	Default method	To warehouse	From warehouse	
0223	All		S.I.	DFT		
0880	lalsupp1		Inventory planning			
201	All					
201	SUPP002	A				
223	All			DFT		
835	All					

Amend
Copy
Delete
Items

Search Add Previous page Next page Refresh

Items						Last refreshed: 09:56:47 06/05/2003
Search		Results				
Ship to	0880 - Midlands LA Location		Ship from	LAL1 Supplys Ltd		
Supplier	lalsupp1 - LAL1 Supplys Ltd					
Item	Description	Contract	Fulfilment method	Status		
ERPDEMOITEM001	Demonstration Item 001	3.1	Inventory planning	Active		
ERPDEMOITEM002	Demonstration Item 002	3.1	Inventory planning	Active		
ERPDEMOITEM003	Demonstration Item 003	3.1	Inventory planning	Active		

Search Add Previous page Next page Refresh Cancel

Function

- To add, amend, copy and delete item details relating to a network rule.

7.5.1 Add / Amend Item Details

Access and Availability

Accessed by selecting Network Rule, Results, Items, Add from the Configuration menu tab.

Items				
Search		Results		
Last refreshed: 09:56:47 06/05/2003				
Ship to Supplier		0880 - Midlands LA Location lalsupp1 - LAL1 Supplys Ltd		Ship from LAL1 Supplys Ltd
Item	Description	Contract	Fulfilment method	Status
ERPDEMOITEM001	Demonstration Item 001	3.1	Inventory planning	Active
ERPDEMOITEM002	Demonstration Item 002	3.1	Inventory planning	Active
ERPDEMOITEM003	Demonstration Item 003	3.1	Inventory planning	Active
Search Add Previous page Next page Refresh Cancel				

Item - Add			
Last refreshed: 09:58:08 06/05/2003			
Ship to Supplier	0880 - Midlands LA Location lalsupp1 - LAL1 Supplys Ltd	Ship from	LAL1 Supplys Ltd
ERP item	<input type="text"/>	ERP item description	<input type="text"/>
Supplier item	<input type="text"/>	Supplier item description	<input type="text"/>
Engineering level	<input type="text"/>	Contract	<input type="text"/>
Planner	<input type="text"/>		
To warehouse	(None) <input type="button" value="v"/>	From warehouse	(None) <input type="button" value="v"/>
Fulfilment method	Inventory planning <input type="button" value="v"/>	Date basis	Shipment <input type="button" value="v"/>
UOM	Each <input type="button" value="v"/>	Lot number required?	No <input type="button" value="v"/>
Container quantity	<input type="text" value="1.0"/>	Round requirements to container quantity	No <input type="button" value="v"/>
Price source	Price list <input type="button" value="v"/>	Invoice Item	No <input type="button" value="v"/>
Lead Time to shipment	Use network rule <input type="button" value="v"/>	Override lead time to shipment (hours)	<input type="text" value="0"/>
Override lead time to shipment (days)	<input type="text" value="0"/>	Volume (Metres)	<input type="text" value="0.000"/>
Net weight (Kg)	<input type="text" value="0.000"/>	Consumption calculation period (days)	<input type="text" value="14"/>
Recommended shipment calculation	Replace consumption <input type="button" value="v"/>	Economic order quantity	<input type="text" value="0"/>
Apply economic order quantity	No <input type="button" value="v"/>	Purchase order line	<input type="text"/>
Purchase order	<input type="text"/>		
Save Save inactive Balances Cancel			

Panel Entries

ERP Item	Enter the Item code as used within the customer ERP system
ERP Item Description	Enter free format item description
Supplier item	Optional. Enter the Supplier item code
Supplier Item Description	Optional. Enter free format item description

Engineering Level	Optional. Enter the engineering level if required.
Contract	Optional. Note: the contract number may only be specified when adding a new item.
Planner	Optional. Relevant to data filters assigned to Wesupply users.
To Warehouse	Warehouse entries may be selected from the drop down list. Warehouses are created using the Warehouse option from the Configuration menu tab.
From Warehouse	N.B. Inventory transactions will be created for these warehouses according to the parameters selected on the Network rule that applies to this item.
Fulfilment Method	Select Inventory Planning from the drop down list. Other choices include S.I., External, Kanban.
Date basis	This field defaults to Shipment basis for an Inventory item
UOM	Select the unit of measure from the drop down list.
Lot Control	Select Yes or No from the drop down list. Is the item a Lot Controlled Item?
Container Quantity	Enter the number of parts in a container.
Round requirements to container quantity	If 'Round requirements to container quantity' on the Network rule is set to Yes then round up to the next container quantity. If (the resulting quantity plus the projected On Hand at time of delivery) is > Max Balance, round down to the maximum number of containers which fit under the Max Balance, unless the number of containers is 1 in which case leave it alone.
Price Source	The price source entry will be ' Price List ' for Inventory planning items if invoicing required.
Invoice Item	Select Yes if Wesupply will generate invoices for this Network Rule / Item.
Lead Time to Shipment	Specify the lead time in days. The lead time is used in the calculation of the date/time for recommended inventory planned shipments.

	Select from the drop down list. Choose from use network rule, same day, Lead time specified here.
Override lead time to shipment (days)	If the lead time to shipment field is set to lead time specified here , enter the lead time days or hours. Used in the calculation of the date/time for recommended Inventory planed shipments
Override lead time to shipment (hours)	If the lead time to shipment field is set to lead time specified here , enter the lead time days or hours . Used in the calculation of the date/time for recommended Inventory planed shipments
Net weight	Optional. The net weight of the item
Volume	Optional. The volume of the item
Recommended shipment calculation	Choose from Fill to maximum or Replace consumption from the drop down list. N.B. Recommended shipment quantity calculation = if the On Hand Balance (OHB)<(min balance + forecast qty total Working Days Consumption Period) then recommend ship qty = ((min balance + forecast qty)- OHB).
Consumption calculation period (days)	If the option for Recommended shipment calculation is ' Replace consumption ' the user is required to define a period (working days) for which consumption is to be calculated.
Apply economic order quantity	Select from the drop down list, No, As a minimum, Always of you want ran economic order quantity to be applied.

Economic order quantity	Specify an economic order quantity if required.
Purchase order	Specify a default PO number for the item.
Purchase order line	Specify PO line number for the item.

Buttons

- **Save** validates the entries made. Returns to the Item Fulfilment List panel if there are no errors.
- **Save Inactive** saves the Item record in an inactive state
- **Balances** applies minimum/maximum balances to the item displayed.

Calculation of Recommended Shipments – Example

The calculation of recommended shipments is done iteratively until the ‘Number of Days for Recommended Shipments’ is reached. Consider the following examples:

Current position

On Hand	750								
In Transit	0								
Minimum	500								
Maximum	4000								
	27/06	28/06	29/06	30/06	01/07	02/07	03/07	04/07	05/07
Outstanding Forecast	200	400	500	800	1000	400	200	200	200
Result – no shipments	550	150	-450	-1250	-2250	-2650	-2850	-3050	-3250

Example 1 – replenish to max

Assuming rounding to container quantity of 500 and Number of Days for Recommended Shipments = 10. Lead time 1 day

	27/06	28/06	29/06	30/06	01/07	02/07	03/07	04/07	05/07
Outstanding Forecast	200	400	500	800	1000	400	200	200	200
Recommended	3500							3500	
Result		3650	3150	2350	1350	950	750	550	3850

Example 2 – replenish consumption

Assuming rounding to container quantity of 500 and Number of Days for Recommended Shipments = 10 and Days to Replenish = 3. Lead time 1 day

	27/06	28/06	29/06	30/06	01/07	02/07	03/07	04/07	05/07
Outstanding Forecast	200	400	500	800	1000	400	200	200	200
Result – no shipments	550	150	-450	-1250	-2250	-2650	-2850	-3050	-3250
Day min balance reached		***				***			
Min bal + 3 days consumption minus on-hand	1650	500 + 2300 – 150 = 2650				500 + 600 – 450 = 650			
Recommended shipment (-1 day)	3000				1000				
Resulting balance		3150	2650	1850	850	1450	1250	1050	850

7.6 Inventory Balance Maintenance

Access and Availability

Accessed by selecting Network Rule, Results, Item, Add/Amend, Balances from the Configuration menu tab.

Balances

Function

- To maintain minimum and maximum stock balances.
- To specify a default in days for the minimum balance cover of stock for the item.
- To specify the default number of forecast days to analyse.

Panel Entries

Minimum balance	Enter the minimum balance / safety stock quantity for this item. This entry is used in the calculation of recommended inventory planned shipment quantities.
Maximum balance	The quantity entered must be greater than the minimum balance and is also used in the calculation of recommended inventory planned shipment quantities.
Minimum balance locked	Select Yes or No .
Maximum balance locked	Select Yes or No .
Minimum balance cover (days)	Specify the minimum number of days cover required for the item.
Number of days forecast to analyse	Specify the number of days forecast to analyse.

7.7 Price List Maintenance.

Access and Availability

Accessed by selecting Network Rule, Results, Items, Prices from the Configuration menu tab.

Item	Description	Contract	Fulfilment method	Status
ERPDEMOITEM001	Demonstration Item 001	3.1	Inventory planning	Active
ERPDEMOITEM002	Demons	3.1	Inventory planning	Active
ERPDEMOITEM003	Demons	3.1	Inventory planning	Active

Function

- Displays all prices or effective prices for a selected item depending on Price List search criteria
- Click on **Prices** to access Price Maintenance.

Effective date		Quantity break 1 price
From	To	
01/05/2003	29/08/2003	113.0000000

- The price list search panel displays the effective date periods and quantity break prices for an item.
- Allows the user to maintain price information for items. The prices maintained here will be used in Invoicing where the *Price Source* shown against the item in *Item Network Rule maintenance* is *Price List*.

7.7.1 Add / Amend Price Details

Access and Availability

Accessed by selecting Network Rule, Results, Items, Prices, Add from the Configuration menu tab.

Prices Last refreshed: 11:43:49 12/05/2003

Search Results

Ship to: 0880 - Midlands LA Location
 Supplier: lalsupp1 - LAL1 Supplys Ltd
 Item: ERPDEMOITEM001
 Contract: 3.1

Ship from: LAL1 Supplys Ltd

Effective date		Quantity break 1 price
From	To	
01/05/2003	29/08/2003	113.0000000

Search Add Previous page Next page Refresh Cancel

Amend
 Copy
 Delete

Price maintenance - Add Last refreshed: 11:19:27 06/05/2003

Ship to: 0880 - Midlands LA Location
 Supplier: LAL1 Supplys Ltd
 Ship from: LAL1 Supplys Ltd
 ERP item: ERPDEMOITEM001
 Contract: 3.1

Effective date - Start / End:

Price basis: Zero

Price multiple:

Tax code/rate: Taxed

Quantity break		Price	
1.	<input style="width: 50px;" type="text" value="0.0"/> (EA)	<input style="width: 50px;" type="text" value="0.0000000"/> (EURO)	
2.	<input style="width: 50px;" type="text" value="0.0"/> (EA)	<input style="width: 50px;" type="text" value="0.0000000"/> (EURO)	
3.	<input style="width: 50px;" type="text" value="0.0"/> (EA)	<input style="width: 50px;" type="text" value="0.0000000"/> (EURO)	
4.	<input style="width: 50px;" type="text" value="0.0"/> (EA)	<input style="width: 50px;" type="text" value="0.0000000"/> (EURO)	
5.	<input style="width: 50px;" type="text" value="0.0"/> (EA)	<input style="width: 50px;" type="text" value="0.0000000"/> (EURO)	

Save Refresh Cancel

Function

- Allows the user to add price list details for an item.

Panel Entries

Effective Date – Start / End	Enter the dates covering the period during which this price is to be applied. Date ranges may overlap. Invoicing will use the price with the later start date.
Price Basis	Select Zero if the default price is zero and the user specifies the price upon confirmation. Select Price Per UOM if the entered price will apply to each unit. Select Price Per Multiple if the entered price will apply to multiple quantities of the item.
Price multiple	If the Price Basis is Price Per Multiple , enter the quantity that the Price Basis applies to. Invoicing divides by price by per multiple.
Tax Code/Rate	If the item is taxed, enter the tax code and rate percentage to be applied.
Quantity Break	Enter the quantities at which price breaks occur. Leave blank if the price is to apply to any quantity.

7.8 Transaction Posting

Access and Availability

Accessed by clicking Transaction Posting from the Inventory tab.

The screenshot shows a web form titled "Transaction posting" with a timestamp "Last refreshed: 09:59:08 07/05/2003". The form contains a dropdown menu for "Transaction type" which is currently set to "Adjustment". Below the dropdown is a "Go" button.

Function

- To allow the user to select the required Inventory Transaction from the drop down box.

Choices include:

Adjustment, Balance Restatement, Shipment Confirmation, Receipt to Stock, Receipt to Inspection, Inspection to Stock, Receipt Rejection, QA Rejection, Late Rejection

- To allow the manual entry of inventory transactions.
- Inventory Transaction Posting provides the user with the facility to enter inventory transactions that will affect the Inventory balances for an item according to the Transaction Type.
- Inventory transactions may be posted at the following levels:
 - Item
 - Item/Supplier
 - Item/Supplier/Ship From

For Example: Adjustment

The screenshot shows the "Transaction posting" form with "Adjustment" selected in the "Transaction type" dropdown. The form is populated with the following values:

- Item: [Empty text box]
- Warehouse: Select warehouse (dropdown)
- Stock type: Good stock (dropdown)
- Level: Item (dropdown)
- Supplier: [Empty text box]
- Ship from: [Empty text box]
- Affect higher levels: Yes (dropdown)
- Transaction quantity: [Empty text box]
- Transaction references: [Three empty text boxes]
- Transaction comment: [Empty text box]
- Transaction date/time: [Empty text box] with a calendar icon

 At the bottom of the form are "Confirm" and "Cancel" buttons. The timestamp "Last refreshed: 10:03:42 07/05/2003" is visible in the top right corner.

Panel Entries

Item	Key in the item code.
Warehouse	Select warehouse from the drop down list.
Stock Type	Select from the drop down list Good stock, Inspection, In-transit to warehouse, In-transit from warehouse.
Level	Specify at what level the transaction posting is to occur. Choose from Item, Item/Supplier, Item/Supplier/Ship from
Supplier	Specify the supplier.
Ship from	Specify the ship from location if required.
Affect higher levels	Specify whether or not the transaction posting will affect higher levels. Select Yes or No .
Transaction Quantity	Enter the transaction quantity.
Transactions References	Specify up to three transaction references if required.
Transaction Comment	Enter a transaction comment if required. Free format text.
Transaction Date/Time	Enter the transaction date and time.

7.9 Transaction Enquiry

Access and Availability

Accessed by clicking Transaction enquiry from the Inventory tab.

Search

Transaction enquiry Last refreshed: 10:16:46 07/05/2003

Search Results

Warehouse:

Supplier: From or equal to To

Ship from:

ERP item:

Supplier's item:

Level:

Results

Transaction enquiry - item list Last refreshed: 12:42:58 12/05/2003

Search Results

Warehouse: LALWH1 Whse W Mids

Item	In-transit to warehouse	Good stock	Inspection	In-transit from warehouse
ERPDEMOITEM001	0.0	1,000.0	0.0	0.0
ERPDEMOITEM002	1,200.0	1,000.0	0.0	0.0
ERPDEMOITEM003	0.0	1,000.0	0.0	0.0

Search Previous page Next page

Function

- To enable the user to enter selection criteria to enquire on inventory transaction details.
- An individual warehouse may be selected to display only items held in that warehouse.
- A single item code may be entered to display the inventory balances for that item in all warehouses.

7.9.1 Transaction enquiry – Item List

Access and Availability

Accessed by selecting Inventory enquiry, Results, Transactions from the Inventory menu tab.

Transaction enquiry - item list					Last refreshed: 12:42:58 12/05/2003
Search		Results			
Warehouse	LALWH1		Whse W Mids		
Item	In-transit to warehouse	Good stock	Inspection	In-transit from warehouse	
ERPDEMOITEM001	0.0	1,000.0	0.0	0.0	
ERPDEMOITEM002	1,200.0	1,000.0	0.0	0.0	
ERPDEMOITEM003	0.0	1,000.0	0.0	0.0	
Search				Previous page	
				Next page	
					Transactions

Function

- The Inventory Transaction Enquiry panel provides visibility of the inventory balances and transaction details for an item within a warehouse.
- All items designated inventory planned will be displayed according to the previously entered selection criteria.
- Hover on the item and right click **Transactions** to display the detail.

Transaction enquiry								Last refreshed: 10:52:40 07/05/2003
Search		Results						
Warehouse	LALWH1 - Whse W Mids							
Item	ERPDEMOITEM001 Demonstration Item 001							
Transaction type	Date/time	In-transit (inbound)	Good stock	Inspection	In-transit (outbound)	Shipment id	Reference 1	
Current balance		0.0	1,000.0	0.0	0.0			
Receipt to stock	30/04/2003 15:52	-1,000.0	1,000.0	0.0	0.0	536336	1588LA	
Inbound shipment	30/04/2003 15:43	1,000.0	0.0	0.0	0.0	536336	1588LA	
Search		Previous page		Next page		Cancel		
							View	

- Hover on a transaction type and right click **View** to display the transaction detail.

Inventory Transaction Detail

Transaction detail					Last refreshed: 12:52:18 12/05/2003
Warehouse	LALWH1 - Whse W Mids		Location	Demonstration Item 002	
Item	ERPDEMOITEM002		Description		
Transaction details					
Transaction type	Inbound shipment		Created	Quantity	
Inventory level	Item		Comments	07/05/2003 13:43	
User	laluksupp1		External sequence no.	1,200.0	
Reference	LAL9356				
Internal sequence no.	37				
Shipment details					
Shipment id	536338		Shipment line id	0001	
Emergency shipment?	No				
Effective on balances					
Stock type	Good stock		Inspection	In-transit (inbound)	
Quantity	0.0		0.0	1,200.0	
			In-transit (outbound)		
			0.0		

7.10 Inventory Planning

Access and Availability

Accessed by selecting Inventory planning from the Inventory menu tab.

Search

Function

- To allow the entry of selection criteria for the display of inventory balances for inventory planned items.

Panel Entries

Ship to	The Ship to code is mandatory and must already have been defined within both Address Maintenance and Fulfilment Network rules.
Supplier	The facility to select a supplier is only available to the Customer.
Ship from	Optional. Select the ship from location from the drop down list to display results for just that location.
ERP Item	Optional. Enter a/a range to and from ERP Item if required.
Supplier's Item	Optional. Enter a/a range to and from Supplier's Item if required.
Recommended shipment date/time	Optional. Enter to/from recommended shipment date and time (supplier local time).

Ordered	Select from the drop down list Item or Recommended ship date/time, item.
----------------	--

Processing Options

Function

- Enables the user to enquire on new default settings without changing the default configuration settings. The processing options will remain the new default until either a change to the selection is made or the user signs out of Wesupply.

Panel Entries

Calculate recommended shipments	Select Yes for Wesupply to calculate recommended shipment quantities based on current inventory balances. Select No to display all items for this Ship to location
Show only items with recommended shipments	Select Yes to display only items where Wesupply has calculated a recommended shipment quantity Select No will display all items for this Ship to location <i>N.B. This entry is only relevant where the Calculate Recommended Shipments option is set to Yes.</i>
Recommended shipment horizon days (override)	Enter the number of days of required.
Maximum recommended shipments per item Or Create a single shipment on (date/time)	Enter a maximum number of shipments per item. Or Create a single shipment based on the date and time entered (supplier local time).
Update existing planned shipments	Select from the drop down list Yes or No .

Results

Inventory planning Last refreshed: 12:50:46 07/05/2003										
Search		Processing options		Results						
Ship to 0880 - Midlands LA Location										
Ship from	Item	Description	Minimum balance	Maximum balance	Good stock	In-transit	Total planned	Next recommended shipment		Quantity to ship
								Date/Time	Quantity	
	SUPDEMOITEM001	Demonstration Item 001	124.7	10,000.0	1,000.0	0.0	0.0	07/05/2003 11:52	0.0	1400.0
	SUPDEMOITEM002	Demonstration Item 002	124.7	10,000.0	1,000.0	0.0	0.0	07/05/2003 11:52	0.0	0.0
	SUPDEMOITEM003	Demonstration Item 003	124.7	10,000.0	1,000.0	0.0	0.0	07/05/2003 11:52	0.0	0.0
Search		Continue	Previous page	Next page	Print	Refresh				

Function

- Enables the user to display items for inventory planning along with the current inventory balance.
- Where the option to recommend shipments has been taken, this panel will show the recommended shipment quantities and shipment dates.
- Recommended shipments are calculated based on minimum/maximum inventory balance, current inventory – either on hand or in transit, and the supplier delivery calendar.
- Shipments may be planned using this panel. Enter **quantity to ship** against an item.
- Colour coded transaction quantities.

Red – less than or equal to zero
 Orange – between zero and minimum balance
 Green – between minimum and maximum balance
 Blue – greater than the maximum balance

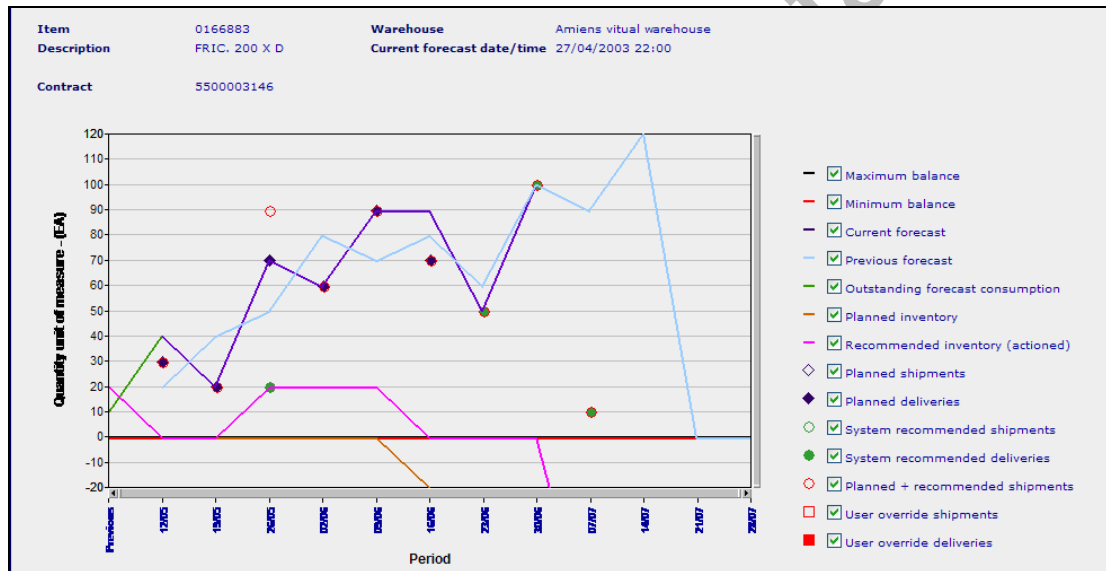
- To plan shipments based on forecast/historical details for an item, hover over an item line and right click. Select **Detail**.

7.10.1 Inventory Planning - Item Projected Stock

Access and Availability

Accessed by selecting Inventory planning, Detail from the Inventory menu tab.

Inventory planning											Last refreshed: 13:38:30 12/05/2003	
Search		Processing options		Results								
Ship to	Item	Contract	Description	Minimum balance	Good stock	Quarantine	In-transit	Total planned	Next recommended shipment Date/Time	Quantity	Quantity to ship	
C02	0166883	5500003146	FRIC. 200 X D	0	0	0	20	340	26/05/2003 00:00	10	10	
C02	0183964	5500003145	FRIC. 181,5 K E	0	0	0	0	80	12/05/2003 12:21	0	0	
C02	0185417	5500003163	FRIC. 215 K	0	0	0	0	50	12/05/2003 12:21	0	0	
C02	366923N	5500003209	MECA.215 CP 4250	0	0	0	0	22	25/06/2003 00:00	1	1	
C02	592589N	5500003211	APPAR.220CPN/X(D..)	0	0	0	0	50	12/05/2003 12:21	0	0	



- Scroll to display the detail

Date	Previous	12/05	19/05	26/05	02/06	09/06	16/06	23/06	30/06	07/07	14/07	21/07
Stock on-hand (EA)	0											
In-transit (inbound)	20											
Maximum balance												
Minimum balance												
Previous forecast	20	40	20	70	60	90	90	50	100	90	120	0
Current forecast	40	20	70	60	90	90	50	100	90	120	0	
Forecast comparison (%)		100%	-50%	40%	-25%	28%	12%	-16%	0%	0%	0%	0%
Outstanding forecast consumption	10	40	20	70	60	90	90	50	100	90	120	0
Planned shipments		30	20	70	60	90	90	50	100	90	120	0
Planned deliveries		30	20	70	60	90	90	50	100	90	120	0
Planned inventory	20	0	0	0	0	0	-20	-70	-170	-260	-380	-380
System recommended shipments				20				50	100	10		
System recommended deliveries		30	20	20	60	90	70	50	100	10		
Planned + recommended shipments				90				50	100	10		
User override shipments												
User override deliveries												
Recommended inventory (actioned)	20	0	0	20	20	20	0	0	0	-80	-200	-200

Function

Graph Options

- To graphically display inventory by item.
- Tick or un-tick the legend boxes to change the graphical display.
- The default legend options are available if configured in the Inventory Planning settings.

Panel Entries

- Display Stock on hand, In transit, min/max balances
- Click on the In-transit (inbound) figure to display In-transit summary.

In-transit summary							Last refreshed: 11:41:18 13/05/2003
Shipment	Line	Actual shipment date/time	Required delivery date/time	Expected delivery date/time	Ship qty	Rec qty	In-transit
100035	0001	25/04/2003 00:00	28/04/2003 23:59	*OVERDUE*	10	0	10
100040	0001	25/04/2003 00:00	05/05/2003 23:59	*OVERDUE*	10	0	10

- To compare Current/Previous Forecast showing forecast comparison as a percentage figure and also Outstanding Forecast Comparison.
- To display planned shipments, delivery and inventory. Click on the appropriate figure to display summary information.

For Example:

Shipments overdue for despatch						Last refreshed: 11:28:46 13/05/2003
Shipment	Line	Required shipment date/time	Expected shipment date/time	Required delivery date/time	Expected delivery date/time	Adjusted qty
100041	0001	12/05/2003 00:00	12/05/2003 00:00	12/05/2003 00:00	12/05/2003 00:00	10
100041	0002	12/05/2003 00:00	12/05/2003 00:00	12/05/2003 00:00	12/05/2003 00:00	10

- To display system generated shipments/deliveries, planned + recommended shipments.
- Enables the user to plan shipments/deliveries by keying appropriate quantities for the item into the User Override fields.
- To display the periods of recommended inventory actioned for an item.

Buttons

- **Confirm** accepts the user override quantities keyed and presents the shipment lines for release/ship confirmation.
- **Recalculate** takes the user override entries on screen and recalculates the graph including any user recommendations.
- **Re-build Graph** takes the user override entries on screen and rebuilds the graph.
- **Next Item** automatically displays the next item from the item list sequence.
- **Processing Options** enables the user to change the default panel settings displayed.
- **Refresh** updates to panel back to its original form prior to changes being made.
- **Print** enables the user to print shipments/deliveries planned.
- **Cancel** takes the user back to the previous panel cancelling any changes keyed.

7.11 Planned Shipments – Release/Confirm Shipment

Access and Availability

Accessed by selecting Inventory planning, Detail from the Inventory menu tab.

Inventory planning - Release shipments							Last refreshed: 13:03:49 07/05/2003		
Shipment date / time	Delivery date / time	Ship to	Supplier	Ship from	Planned shipment	Supplier reference 1	Confirm	Select	
07/05/2003 11:52	07/05/2003 11:52	0880	lalsupp1			<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

Panel Entries

Supplier Reference 1	Enter a supplier reference for the shipment. i.e. Despatch No.
Confirm	Tick the box to confirm that you wish to release/confirm the shipment.
Select	Tick the box to select the shipments that you wish to confirm.

- Enables the supplier to Select and/or confirm the planned shipments as shipped when released.
- If the **Select** and **Confirm** boxes are both **ticked** against a planned shipment then these shipments will be automatically ship confirmed when released.

Inventory planning - Release shipments							Last refreshed: 13:41:48 07/05/2003		
Shipment date / time	Delivery date / time	Ship to	Supplier	Ship from	Planned shipment	Supplier reference 1	Confirm	Select	
07/05/2003 12:41	07/05/2003 12:41	0880	lalsupp1			<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

- View **Item Demand** to confirm that the item has been shipped.

Item shipping instruction detail							Last refreshed: 13:44:32 07/05/2003			
Ship to	0880 - Midlands LA Location			Ship from	LAL1 Supplys Ltd					
Release number				Release date / time						
Item	SUPDEMOITEM002			Description	Demonstration Item 002					
Contract number				Engineering level						
Planner				Cumulative quantity received	0.0					
Customer stated arrears	0.0									
Late rejects this cycle	0.0									
Purchase order										

Shipment date / time	Shipment id	Ship. line id	Source	Ordered qty	Adjusted qty	Shipped qty	Received qty	Status	Notes
30/04/2003 00:00	536336	0002	Inventory planning	1,000.0	1,000.0	1,000.0	1,000.0	Fully received	No
07/05/2003 12:41	536338	0001	Inventory planning	1,200.0	1,200.0	1,200.0	0.0	Shipped	No

- If the **confirm** box is **not** ticked then the selected planned shipments when released must be shipped via the normal shipping confirmation panel in delivery.

Inventory planning - Release shipments									Last refreshed: 13:03:49 07/05/2003	
Shipment date / time	Delivery date / time	Ship to	Supplier	Ship from	Planned shipment	Supplier reference 1	Confirm	Select		
07/05/2003 11:52	07/05/2003 11:52	0880	lalsupp1				<input type="checkbox"/>	<input checked="" type="checkbox"/>		

Buttons: Release, Previous page, Next page, Refresh, Cancel

- View the Total **Quantity Planned** for Shipment by item using the enquiry panel.

Inventory planning										Last refreshed: 13:11:59 07/05/2003	
Search		Processing options		Results							
Ship to										0880 - Midlands LA Location	
Ship from	Item	Description	Minimum balance	Maximum balance	Good stock	In-transit	Total planned	Next recommended shipment		Quantity to ship	
								Date/Time	Quantity		
	SUPDEMOITEM001	Demonstration Item 001	124.7	10,000.0	1,000.0	0.0	1,400.0	07/05/2003 12:13	0.0	0.0	
	SUPDEMOITEM002	Demonstration Item 002	124.7	10,000.0	1,000.0	0.0	0.0	07/05/2003 12:13	0.0	0.0	
	SUPDEMOITEM003	Demonstration Item 003	124.7	10,000.0	1,000.0	0.0	0.0	07/05/2003 12:13	0.0	0.0	

Buttons: Search, Continue, Previous page, Next page, Print, Refresh

- View **Item Demand** to confirm that the planned order quantity is ordered but not shipped.

Item shipping instruction detail										Last refreshed: 13:14:45 07/05/2003	
Ship to		0880 - Midlands LA Location			Ship from		LAL1 Supplys Ltd				
Release number					Release date / time						
Item		SUPDEMOITEM001			Description		Demonstration Item 001				
Contract number		3.1			Engineering level						
Planner					Cumulative quantity received		0.0				
Customer stated arrears		0.0			Late rejects this cycle		0.0				
Purchase order											

Buttons: Information, Reconciliation

Shipment date / time	Shipment id	Ship. line id	Source	Ordered qty	Adjusted qty	Shipped qty	Received qty	Status	Notes
30/04/2003 00:00	536336	0001	Inventory planning	1,000.0	1,000.0	1,000.0	1,000.0	Fully received	No
07/05/2003 11:52	536337	0001	Inventory planning	1,400.0	1,400.0	*OVERDUE*	0.0	Created	No

Buttons: Notes, Previous page, Next page, Print, Refresh, Cancel

- **Ship Confirm** the planned shipment via the Shipping Confirmation panel from Delivery.

Shipping confirmation										Last refreshed: 13:19:21 07/05/2003	
Required shipment date/time	Expected shipment date/time	Ship to	Shipment id	Acknowledged	No. of items	No. of units	No. of packs	Ship from	Purchase order	Status	
07/05/2003 11:52	07/05/2003 11:52	0880	536337	Not required	1.0	1,400.0	1,400.0				

Buttons: Previous page, Next page, Refresh, View, Date change audit

- **View** the Detail

- Confirm the shipment.

Shipping confirmation Last refreshed: 13:21:49 07/05/2003

Shipment id	536337	Ship from	LAL1 Supplys Ltd
Ship to	0880 - Midlands LA Location	Required delivery date/time	07/05/2003 11:52
Required shipment date/time	07/05/2003 11:52	Expected delivery date/time	07/05/2003 11:52
Expected shipment date/time	<input type="text" value="07/05/2003"/> <input type="text" value="11:52"/>		
Actual ship date/time	<input type="text" value=""/> <input type="text" value="00:00"/>	Transport reference	<input type="text" value=""/>
Actual gross Wt.	<input type="text" value="0.0"/>	AETC code	<input type="text" value=""/>
Supplier reference	<input type="text" value=""/>		

Item	Description	Line id	Notes	Req'd Qty.	UOM	Ship qty	Packs	Act. packs	Del. gate	Del. dock	Purchase order / line
SUPDEMOITEM001	Demonstration Item 001	0001	No	1,400.0	EA	▶ 1,400.0	1,400	1,400	<input type="text" value=""/>	<input type="text" value=""/>	/

7.11 Inventory Planning Enquiry

Access and Availability

Accessed by selecting Inventory planning enquiry from the Inventory menu tab.

Search

The screenshot shows the 'Inventory planning enquiry' search interface. At the top, it says 'Last refreshed: 11:32:53 07/05/2003'. Below the title bar are three tabs: 'Search', 'Processing options', and 'Results'. The 'Search' tab is active. The form contains the following fields:

- Ship to:** A dropdown menu set to 'All'.
- Supplier:** A dropdown menu set to 'All'.
- Ship from:** A dropdown menu set to 'All'.
- ERP item:** A text input field.
- Supplier's item:** A text input field.
- Recommended shipment date/time:** Two date/time pickers. The first is labeled 'From or equal to' and the second is labeled 'To'. Both are set to a date and time, with '(supplier local time)' indicated.
- Ordered:** A dropdown menu set to 'Item'.

At the bottom of the form are 'Go' and 'Refresh' buttons.

Function

- To allow the entry of selection criteria for the display of inventory balances for inventory planned items.

Processing Options

The screenshot shows the 'Inventory planning enquiry' processing options interface. At the top, it says 'Last refreshed: 11:34:53 07/05/2003'. Below the title bar are three tabs: 'Search', 'Processing options', and 'Results'. The 'Processing options' tab is active. The form contains the following settings:

- Calculate recommended shipments:** A dropdown menu set to 'No'.
- Show only items with recommended shipments:** A dropdown menu set to 'No'.
- Recommended shipment horizon days (override):** A text input field set to '0'.
- Maximum recommended shipments per item:** A text input field set to '1'.
- OR**
- Create a single shipment on:** A date/time picker set to '07/05/2003 11:34 (supplier local time)'.

At the bottom of the form are 'Go' and 'Refresh' buttons.

Function

- Enables the user to enquire on new default settings without changing the default configuration settings. The processing options will remain the new default until either a change to the selection is made or the user signs out of Wesupply.

Results

Inventory planning - Shipment enquiry								
Search		Processing options		Results			Last refreshed: 11:36:40 07/05/2003	
Ship to 0880 - Midlands LA Location								
Supplier	Ship from	Item	Minimum balance	Maximum balance	Good stock	Quarantine	In-transit	Total planned
lalsupp1		ERPDEMOITEM001	124.7	10,000.0	1,000.0	0.0	0.0	0.0
lalsupp1		ERPDEMOITEM002	124.7	10,000.0	1,000.0	0.0	0.0	0.0
lalsupp1		ERPDEMOITEM003	124.7	10,000.0	1,000.0	0.0	0.0	0.0
Search		Previous page	Next page	Print	Refresh			

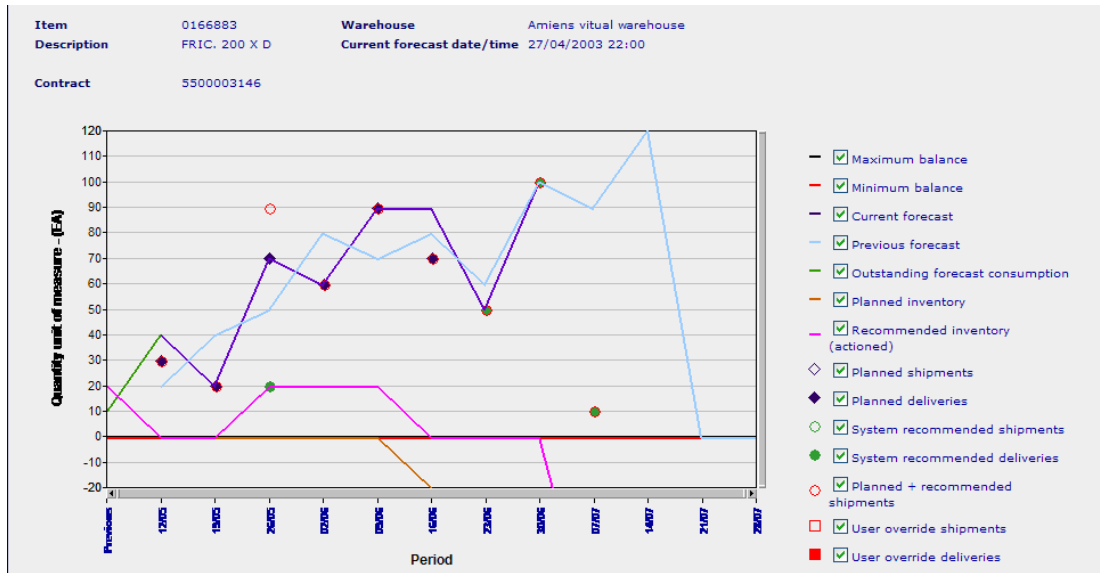
Function

- Enables the user to display the results of the search criteria taking into consideration any changes keyed in the processing options.
- To display the item detail, hover over the item line and right click. Select **Detail**.
- Colour coded transaction quantities.

- Red – less than or equal to zero
- Orange – between zero and minimum balance
- Green – between minimum and maximum balance
- Blue – greater than the maximum balance

- To view the detail by item, hover over the item line and right click. Select **Detail** to view.

For Example – Item Projected Stock Balance Enquiry



Stock on-hand (EA)	0	Maximum balance	0										
In-transit (inbound)	20	Minimum balance	0										
Date	Previous	12/05	19/05	26/05	02/06	09/06	16/06	23/06	30/06	07/07	14/07	21/07	28/07
Previous forecast		20	40	50	80	70	80	60	100	90	120	0	0
Current forecast		40	20	70	60	90	90	50	100	90	120	0	0
Forecast comparison (%)		100%	-50%	40%	-25%	28%	12%	-16%	0%	0%	0%	0%	0%
Outstanding forecast consumption	10	40	20	70	60	90	90	50	100	90	120	0	0
Planned shipments		30	20	70	60	90	70						
Planned deliveries		30	20	70	60	90	70						
Planned inventory	20	0	0	0	0	0	-20	-70	-170	-260	-380	-380	-380
System recommended shipments				20				50	100	10			
System recommended deliveries				20				50	100	10			
Planned + recommended shipments		30	20	90	60	90	70	50	100	10			
Recommended inventory (actioned)	20	0	0	20	20	20	0	0	0	-80	-200	-200	-200

Next item Processing options Refresh Print Cancel

7.11.1 Item History vs Projected Forecast

Access and Availability

Accessed by selecting Inventory planning enquiry, Detail, Processing Options from the Inventory menu tab.

Stock on-hand (EA)	0		Maximum balance	0									
In-transit (inbound)	20		Minimum balance	0									
Date	Previous	13/05	20/05	27/05	03/06	10/06	17/06	24/06	01/07	08/07	15/07	22/07	29/07
Previous forecast		24	42	56	78	72	76	68	98	96	96	0	0
Current forecast		36	30	68	66	90	82	60	98	96	96	0	0
Forecast comparison (%)		50%	-28%	21%	-15%	25%	7%	-11%	0%	0%	0%	0%	0%
Outstanding forecast consumption	18	36	30	68	66	90	82	60	98	96	96	0	0
Planned shipments	20	30	40	60	80	90	20						
Planned deliveries	20	30		100	80	90	20						
Planned inventory	40	16	-14	18	32	-30	-90	-188	-284	-380	-380	-380	
System recommended shipments			20			30	80	50					
System recommended deliveries			10	10		10	60	90					
Planned + recommended shipments	20	30	60	60	90	90	50	80	50				
Recommended inventory (actioned)	40	16	-4	38	52	52	0	0	-8	-104	-200	-200	-200

Inventory planning - Shipment enquiry Last refreshed: 10:35:45 13/05/2003

Processing options | Results

Data type:

Show:

Usage period:

Number of periods:

- Change the Data type for Historical.

Inventory planning - Shipment enquiry Last refreshed: 10:39:54 13/05/2003

Processing options | Results

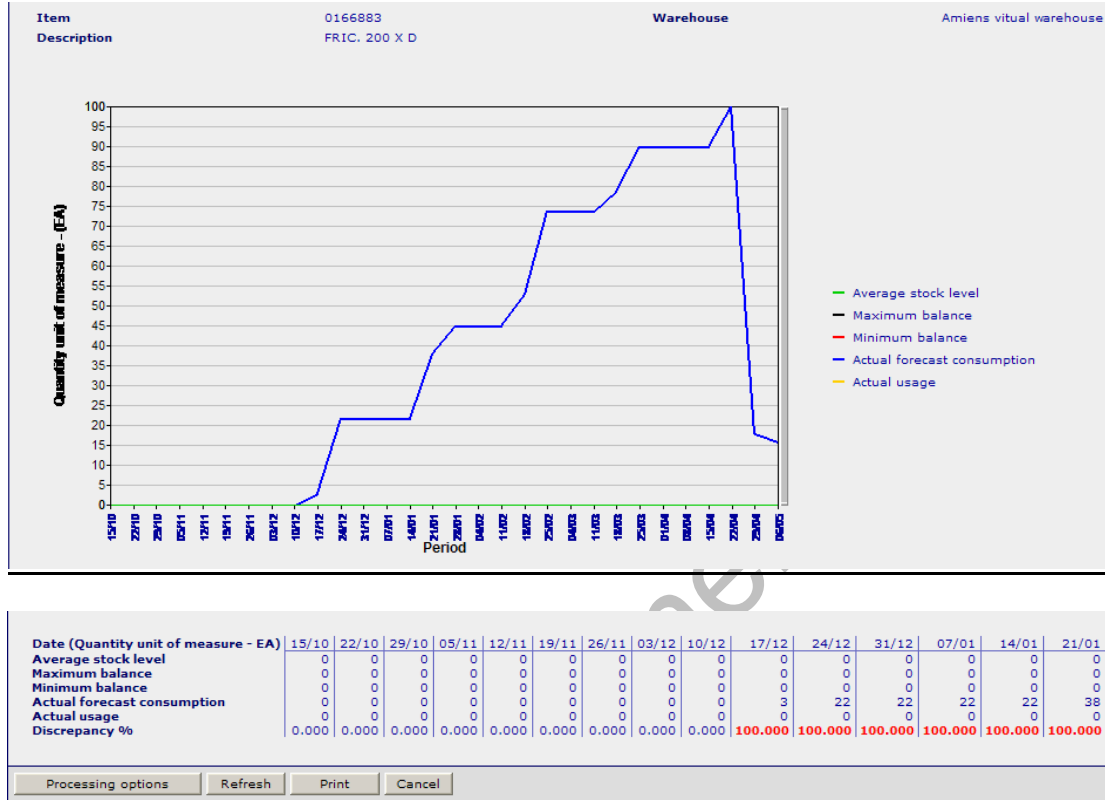
Data type:

Show:

Usage period:

Number of periods:

Example Item History vs Projected Forecast



Function

- Displays the projected inventory balances for the selected item in graphical/tabular form depending on the processing options keyed.