



BLUEPRINT

embark. explore. embrace.

Hidden Gems in SCP

- 1 “I Didn’t Know I Could Do That!”



Agenda

Advanced Seasonality – Removing Profiles

Vacation Ordering

Promo Filter

Item Filter on an Order

Supplier and Item Lookup

Low Stock Point Adjustment



Agenda

Custom Groups

Projections

Exception Optimization

Export Library

Warehouse Multiple

SCA Sharing

Advanced Seasonality

Non-Seasonal & Not Evaluated

Items

List Filtered By : Profile Name :

Export Assign Profiles Remove Simulated Profiles Remove Existing Profiles

Selected Items Strong High Medium Low **Non-seasonal** Not evaluated

Item ID	Description	Location	Activity Code	Velocity Code	Supplier ID	Supplier Name	Buyer Name	Seasonal Value Add	Seasonal Match Score	Profile Name	Profile Source	Class Rate	Class Type
GC704	Green Cleaner 4 oz	012	A - Active	A	011	California Customer A Indiana	Brian Crowell	0 %	0 %	GC704 - 012		Medium	Continuous
GC704	Green Cleaner 4 oz	011	A - Active	A	CENCOA	CENTRAL COAST GARDEN PRODUCTS	Sven Anapu	0 %	0 %	GC704 - 011		Medium	Continuous
GC701	Green Cleaner 2 oz	011	A - Active	A	CENCOA	CENTRAL COAST GARDEN PRODUCTS	Sven Anapu	0 %	0 %	GC701 - 011		Medium	Continuous
DR0120	D Rm 3.0, DR120	011	A - Active	A	PENVC	PenvC	Overseas	0 %	0 %	DR0120-011 - IF -5/29/2020 - Manual	Manual	Slow	Continuous
DDSK716	DD Spider Mite Knockout 16 oz	011	A - Active	A	OALTR	O/A ULTRASOL INDUSTRIES	Tracy Coon	0 %	0 %	DDSK716-011 - AS -9/1/2020	System	Fast	Continuous
DB450	Dyna G Blm gal	011	A - Active	A	016	Customer A North California	Brian Crowell	0 %	0 %	DB450 - 011		Medium	Continuous
CRF476	CYCO Ryzofuel 20 L	012	A - Active	A	011	Customer A Indiana	Brian Crowell	0 %	0 %	CRF476 - 012		Slow	Continuous
BUDL475	Budswel Liq 5 gal	012	A - Active	A	011	Customer A Indiana	Brian Crowell	0 %	0 %	BUDL475 - 012		Medium	Continuous
BGM500	BL Guardian Monitor	011	A - Active	A	BLUCOR	BlueLab Corp., Ltd	Sven Anapu	0 %	0 %	BGM500 - 011		Medium	Continuous
BCM505	BL Combo Repl pH Probe	013	A - Active	A	016	Customer A North California	Brian Crowell	0 %	0 %	BCM505 - 013		Medium	Continuous
BCM500	BL Combo Meter	012	A - Active	A	011	Customer A Indiana	Brian Crowell	0 %	0 %	BCM500 - 012		Medium	Continuous

1-25 of 25 Item

Non-Seasonal – Items that qualified for evaluation but were determined not to be seasonal

Not Evaluated - Items that did not qualify for seasonal evaluation due to classification

Advanced Seasonality

Non-Seasonal – Items that qualified for evaluation but were determined not to be seasonal

Advanced Seasonality

45.00% Minimum Seasonal Match Threshold

30.00% Minimum Seasonal Value Add Threshold

7 Days To Keep New Seasonal Profile Alerts

Defaults from Global, can be overridden on AS job

40 Minimum Seasonal Match Threshold % Use Global

30 Minimum Seasonal Value Add Threshold % Use Global

Seasonal Value Add ▾	Seasonal Match Score
0 %	37 %
0 %	0 %
0 %	18 %
0 %	0 %
0 %	0 %
0 %	15 %
0 %	0 %
0 %	11 %
0 %	24 %
0 %	0 %
0 %	6 %
0 %	0 %

Seasonal Match Score was calculated less than the Global or AS job value
Seasonal Value Add was calculated less than the Global or AS job Value

Advanced Seasonality

Non-Seasonal & Not Evaluated with existing Profiles

Items

List Filtered By : Profile Name :

Export Assign Profiles Remove Simulated Profiles Remove Existing Profiles

Selected Items Strong High Medium Low **Non-seasonal** Not evaluated

Item ID	Description	Location	Activity Code	Velocity Code	Supplier ID	Supplier Name	Buyer Name	Seasonal Value Add	Seasonal Match Score	Profile Name	Profile Source	Class Rate	Class Type
<input type="checkbox"/> GC704	Green Cleaner 4 oz	012	A - Active	A	011	California Customer A Indiana	Brian Crowell	0 %	0 %	GC704 - 012		Medium	Continuous
<input type="checkbox"/> GC704	Green Cleaner 4 oz	011	A - Active	A	CENCOA	CENTRAL COAST GARDEN PRODUCTS	Sven Anapu	0 %	0 %	GC704 - 011		Medium	Continuous
<input type="checkbox"/> GC701	Green Cleaner 2 oz	011	A - Active	A	CENCOA	CENTRAL COAST GARDEN PRODUCTS	Sven Anapu	0 %	0 %	GC701 - 011		Medium	Continuous
<input type="checkbox"/> DR0120	D Rm 3.0, DR120	011	A - Active	A	PENVC	PenVC	Overseas	0 %	0 %	DR0120-011 - IF -5/29/2020 - Manual	Manual	Slow	Continuous
<input type="checkbox"/> DDSK716	DD Spider Mite Knockout 16 oz	011	A - Active	A	OALTR	O/A ULTRASOL INDUSTRIES	Tracy Coon	0 %	0 %	DDSK716-011 - AS -9/1/2020	System	Fast	Continuous
<input type="checkbox"/> DB450	Dyna G Blm gal	011	A - Active	A	016	Customer A North California	Brian Crowell	0 %	0 %	DB450 - 011		Medium	Continuous
<input type="checkbox"/> CRF476	CYCO Ryzofuel 20 L	012	A - Active	A	011	Customer A Indiana	Brian Crowell	0 %	0 %	CRF476 - 012		Slow	Continuous
<input type="checkbox"/> BUDL475	Budswel Liq 5 gal	012	A - Active	A	011	Customer A Indiana	Brian Crowell	0 %	0 %	BUDL475 - 012		Medium	Continuous
<input type="checkbox"/> BGM500	BL Guardian Monitor	011	A - Active	A	BLUCOR	BlueLab Corp., Ltd	Sven Anapu	0 %	0 %	BGM500 - 011		Medium	Continuous
<input type="checkbox"/> BCM505	BL Combo Repl pH Probe	013	A - Active	A	016	Customer A North California	Brian Crowell	0 %	0 %	BCM505 - 013		Medium	Continuous
<input type="checkbox"/> BCM500	BL Combo Meter	012	A - Active	A	011	Customer A Indiana	Brian Crowell	0 %	0 %	BCM500 - 012		Medium	Continuous

1-25 of 25 Items

Often overlooked categories with critical information you need to know

Should these profiles be removed?

Advanced Seasonality

Non-Seasonal & Not Evaluated removing existing Profiles

No profile is better than a bad profile!

- Select the box/boxes for items you wish to remove the existing profile
- Select the Remove Existing Profiles button
- Are you sure...select Yes

Items

List Filtered By : Profile Name : ;

Export Assign Profiles Remove Simulated Profiles Remove Existing Profiles

Delete Existing Profiles

Are you sure you want to delete existing profiles?

Yes No

Selected Items	Strong	High	Medium	Low	Non-seasonal	Not evaluated														
Item ID	Description	Location	Activity Code	Velocity Code																
<input checked="" type="checkbox"/>	SM938D	Sshine Mix #4 3.8 cf Bale	014	A - Active	A															
<input type="checkbox"/>	SP310	Smart Pot #1 7"	010	A - Active	A															
<input checked="" type="checkbox"/>	SSU475	Snow Storm Ultra 5 gal	016	A - Active	A	HUMBOT	Humboldt Bottling	jeff ritter	0 %	0 %	Profile Generated for SSU475/016									
<input type="checkbox"/>	VER907D	Vermiculite 20 qt	014	A - Active	A	016	Customer A North California	Brian Crowell	0 %	0 %	VER907D - 014									
<input type="checkbox"/>	AZS701	AzaSol 6 oz	012	A - Active	A	011	Customer A Indiana	Brian Crowell	0 %	0 %	AZS701 - 012									


The selected item profiles are removed, and the items are re-forecasted

Vacation Ordering

Going to be out of the office for a couple of days?

▼ Orders

Due for Service	<u>27</u>
Scheduled	<u>0</u>
Forward Buy	<u>0</u>
Event	<u>0</u>
Transfer	<u>1</u>
Awarded RFQ	<u>0</u>
Uncalculated	<u>0</u>
Schedule Conflict	<u>0</u>
All Orders	<u>156</u>



First - Perform today's Replenishment

Second - Identify what will likely become Due for Service or Scheduled over the days you're going to be out.

HOW?

Vacation Ordering

Going to be out of the office for a couple of days?

▼ Orders

Due for Service	<u>27</u>
Scheduled	<u>0</u>
Forward Buy	<u>0</u>
Event	<u>0</u>
Transfer	<u>1</u>
Awarded RFQ	<u>0</u>
Uncalculated	<u>0</u>
Schedule Conflict	<u>0</u>
All Orders	<u>156</u>



All Orders...

Not a category you normally work!

Can be used to identify orders that will likely become Due for Service and/or Scheduled while you're out.

Vacation Ordering

Going to be out of the office for a couple of days?

> Order List

List Filtered By: Alert Type: All Orders; Approval Status: Pending; Order Status: Not Delivered;
Orders in red indicate an order is due on a non-scheduled day.

	Supplier Name	Supplier ID	Ship Point	Location	Days Delay ▼	Order Total	Total Units	Buyer
📄	Vendor 8000	8000	Default	WH1	4	3,445.22	3896.00 Units	Blue Ridge
📄	Vendor 5680	5680	Default	DC1	3	1,456.00	800.00 Units	Blue Ridge
📄	Vendor 8000	8000	Default	WH2	2	2,647.80	10060.00 Units	Blue Ridge
📄	Vendor 4000	4000	Default	WH1	1	6,783.57	100.00 Units	Blue Ridge
📄	Distribution Center	DC1	Default	WH1	1	24.00	12.00 Units	Blue Ridge
📄	Vendor 1230	1230	Default	DC1	1	1,271.00	1.00 Units	Blue Ridge
📄	Vendor 1230	1230	Default	WH1	1	1,271.00	1.00 Units	Blue Ridge
📄	Vendor 1230	1230	Default	WH2	1	1,271.00	1.00 Units	Blue Ridge
📄	Vendor 4000	4000	BB	WH2	1	167.37	7.00 Units	Blue Ridge

Use the filter in the Order List to identify orders with

- Days Delay range while you'll be out
- Scheduled Buy (days)

Vacation Ordering

Days Delay Range

Order List Filters

Supplier Name:

Supplier ID:

Ship Point:

Location:

Item Custom Group:

Location Custom Group:

Approval Status:

Order Status:

PO Number:

Order Policy:

Scheduled Buy: Sun Mon Tue Wed
 Thu Fri Sat

Days Delay: To

Order Total: To

Buyer:

Supplier Group 1:

Supplier Group 2:

Days Delay...

Days Delay describe approximately how many days the is from reach the Due for Service alert.

1. Do your regular replenishment
2. Filter the **Days Delay** range you are going to be out

Vacation Ordering

Days Delay Range

> [Order List](#)

Y List Filtered By: Alert Type: All Orders; Approval Status: Pending; Order Status: Not Delivered; Days Delay: 1 To 2;

	Supplier Name	Supplier ID	Ship Point	Location	Days Delay	Order Total	Total Units	Buyer
📄	Distribution Center	DC1	Default	WH1	1	24.00	12.00 Units	Blue Ridge
📄	Vendor 7000	7000	Default	DC1	1	17,040.78	1457.00 Cases	Blue Ridge
📄	Vendor 4000	4000	Default	WH1	1	6,783.57	100.00 Units	Blue Ridge
📄	Vendor 8000	8000	Default	WH2	2	2,647.80	10060.00 Units	Blue Ridge
📄	Vendor 1230	1230	Default	DC1	1	1,271.00	1.00 Units	Blue Ridge
📄	Vendor 1230	1230	Default	WH1	1	1,271.00	1.00 Units	Blue Ridge
📄	Vendor 1230	1230	Default	WH2	1	1,271.00	1.00 Units	Blue Ridge
📄	Vendor 4000	4000	BB	WH2	1	167.37	7.00 Units	Blue Ridge

- Orders will not be built to bracket

 Bracket Build


Order Parameters

Days Delay: 1

Supplier Order Cycle: 7

Lead Time: 2

Days Added: 1

 Build To Days

- Expected Delivery Date push (optional)

Vacation Ordering

Schedule Buy (days)

Order List Filters [Close]

Supplier Name:

Supplier ID: All Suppliers [v]

Ship Point: All Ship Points [v]

Location: All Locations [v]

Item Custom Group: [v]

Location Custom Group: [v]

Approval Status: Pending [v]

Order Status: Not Delivered [v]

PO Number:

Order Policy: All Order Policies [v]

Scheduled Buy: Sun Mon Tue Wed
 Thu Fri Sat

Days Delay: To

Order Total: To

Buyer: Tracy Coon [v]

Supplier Group 1:

Supplier Group 2:

Apply Filters Clear Filters Close

Scheduled Buy...

Vacation Ordering

Scheduled Buy (days)

	<u>Supplier Name</u>	<u>Supplier ID</u>	<u>Ship Point</u>	<u>Location</u>	<u>Days Delay</u>	<u>Order Policy</u>
📄	Vendor 1100	1100	Default	WH2	9	Weekly
📄	Vendor 3000	3000	Default	WH2	2	Weekly
📄	Vendor 4000	4000	Default	WH2	4	Weekly
📄	Vendor 6000	6000	Default	WH2	2	Weekly
📄	Vendor 8000	8000	Default	WH2	4	Weekly
📄	Distribution Center	DC1	Default	WH1	4	Weekly
📄	Distribution Center	DC1	Default	WH2	4	Weekly


Good Guide...

- Days Delay **less** than next scheduled day – place order
- Days Delay **greater** than next scheduled day – don't place order

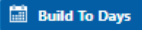
Vacation Ordering

Scheduled Buy Days

	<u>Supplier Name</u>	<u>Supplier ID</u>	<u>Ship Point</u>	<u>Location</u>	<u>Days Delay</u>	<u>Order Policy</u>
📄	Vendor 1100	1100	Default	WH2	9	Weekly
📄	Vendor 3000	3000	Default	WH2	2	Weekly
📄	Vendor 4000	4000	Default	WH2	4	Weekly
📄	Vendor 6000	6000	Default	WH2	2	Weekly
📄	Vendor 8000	8000	Default	WH2	4	Weekly
📄	Distribution Center	DC1	Default	WH1	4	Weekly
📄	Distribution Center	DC1	Default	WH2	4	Weekly

- Orders will not be built to bracket 
- Dynamic Order Cycle – **not the full SOC today**

Order Parameters

Days Delay: 4 Supplier Order Cycle: 1 Lead Time: 8 Days Added: 0 

- Expected Delivery Date push (optional)

Promotional Filter

> Item List > Item Manager

Advanced Parameters

Overstock Transfer

Do Not Transfer

Supplier Value From

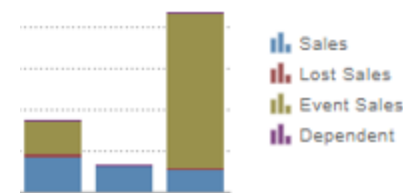
Transfer Multiple

Promotion Filter

Filter Start:

Filter End:

- Promotional Filter allows you to describe Filter Start and Filter End dates
- SCP automatically filters weekly or monthly sales above the item's forecast



Promotional Filter

When you need to filter, but don't need to replenish

Use Cases may include

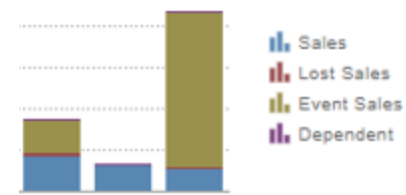
- When you need to filter, but don't need to replenish
- Unannounced promotion/special request that inventory can support
- Inventory push of excess or aged inventory
- Substitutions

› [Item List](#) › [Item Manager](#)

Promotion Filter

Filter Start:

Filter End:



Filter Start date today's date or a future date

Filter End date today's date or a future date

Promotional Filter

Mass Maintenance and/or Upload Requests to Service Desk

> [Item List](#) > [Item Forecast](#) > [Mass Maintenance](#) > [Mass Maintenance Request](#)

1. Provide a name for this update and choose when changes should be performed:

Name:	<input type="text" value="Aged Inventory Push - Sept 2022"/>
Run:	<input checked="" type="radio"/> Immediate <input type="radio"/> Scheduled

2. Select records to change:

[509 results]

Item: Custom Groups In Overstock %,Overstock\$ **AND**

Supplier: Location Equals

Filter results by: Items

Item Number	Location Name	Description	Supplier Name	Supplier	Ship Point Name
SGSBG402	011	SGP SNF 1.25 lb	Farmington	015	Default
SGSBG414	011	SGP SNF 14 lb	Farmington	015	Default
SHT800	011	Hemp Twine 1 mm 301'	Hemp Fortex Industries Ltd	HEMFOR	Default
SID604	011	DBreez Insult Dting 4"x25'	Customer A North California	016	Default
SID610	011	DBreez Insult Dting 10"x25'	Customer A North California	016	Default

1-10 of 509 Items

3. Specify changes to be made to the records in the filtered list:

Item: Filter Start	set as	<input type="text" value="9/19/2022"/>	<input type="button" value="Add"/>
<pre>(tblItems) [PromotionalFilterStart] set as 9/19/2022 (tblItems) [PromotionalFilterEnd] set as 9/23/2022</pre>			

Item Filter on an Order

Need to find item COK100, but not sure what item alert this item is in

Order List > Order Summary

Supplier: 011 - Customer A Indiana Ship Point: Default Location: 016 Scheduled Date: None Last Approval Date: None

RECALCULATE NEEDED Recalculate Recalculate Projections Approve Order Bracket Build Clear

The order has been built below the need and service objectives may not be

Order Totals

Order Amount	Need	Adjusted	Final	Bracket	Parameters
Currency: \$135,089	\$135,089	\$68,622	\$68,622	ID:	1
Units: 35,449	35,449	23,341	26,020	Minimum:	0 Or 0
Weight: 49,816	49,816	22,482	22,482	Maximum:	40,000 Or 28
Net Weight: 0	0	0	0	Unit of Measure:	Weight Or Pallet
Cube: 93,397	93,397	40,321	40,321	Build Type:	Build To Max
Cases: 2,450	2,450	1,149	1,149	Discount Type:	Percent Off
Layers: 35,449	35,449	23,341	23,341	Discount:	0
Pallets: 65	65	27	27		
Cube Adjusted Weight: 0	0	0	0		
Dozen: 35,449	35,449	23,341	23,341		
	35,449	23,341	23,341		

Order Parameters

Days Delay: -24 Supplier Order Cycle: 25 Lead Time: 7 Days Added: -48 Build To Days

Order Items

Less More

(1497) All Items	(0) Activate	(0) Deals	(0) Fwd Buy	(0) LSPADJ	(0) Non-Scheduled	(3) Promotion	(0) Supply Plan	(0) Upcoming Deal
(280) SOQ Items	(0) "A" Missed Service	(0) Demand High	(0) Holiday Calendar	(0) Missed Service	(0) On Hold	(0) RFQ Awarded	(0) RFQ Items	(809) Vary High Deviation
(33) "A" Low Stock Point	(0) Backorder	(0) Demand Low	(0) Infinity Check	(1) On Backorder	(0) RFQ To Be Awarded	(65) Transfer		
(228) Low Stock Point	(0) Constrained SOQ	(427) Dependent Demand	(0) IMM	(3) New	(402) Out Before Delivery	(0) RTFB Simulations	(0) Trend Down	
	(485) Constrained Supply	(0) Event Buy	(0) Kits	(0) New Seasonal Profiles	(0) OUTL Max	(0) Schedule Conflict	(0) Trend Up	
	(0) Deactivate	(0) Event Flow	(7) Large SOQ	(448) No Forecast	(0) Price Decrease	(3) Shelf Life	(0) Unresolved	
(1347) Active	(1347) Active / Watch	(0) Kit	(0) LHM Test	(0) Manual	(26) Non-Stock	(0) Watch		

Item ID: Description: Forward Buy Simulation Reassign Update Qty Clear Filtered Items Export View

Item	Description	Activity Code	SOQ	On Backorder	Days Delay	Units On Hand	Units On Order	Forecast Weekly
SF401	Strepto Force 2 oz	A - Active	9	0	-38	0.00	7	3.76
SF404	Strepto Force 18 oz	A - Active	3	0	-42	0.00	1	0.94
SF407	Strepto Force 54 oz	A - Active	2	0	-39	0.00	1	0.63
SBK604	DBreez Flange Kit 4"	A - Active	4	0	37	1.00	8	0.01
SBK606	DBreez Flange Kit 6"	A - Active	13	0	69	0.00	2	0.01
SGF732	Saf Garden Fung II RTU qt	A - Active	2	0	-84	0.00	0	0.00
SGFC716	Saf Garden Fung Conc 16 oz	A - Active	12	0	-41	0.00	0	0.00

Item Filter on an Order

Filtering for item COK100

Order Items

Less More

(1497) All Items (0) Activate (0) Deals (0) Fwd Buy (0) LSPADJ (0) Non-Scheduled (3) Promotion (0) Supply Plan (0) Upcoming Deal
(280) SOQ Items (0) "A" Missed Service (0) Demand High (0) Holiday Calendar (0) Missed Service (0) On Hold (0) RFQ Awarded (0) RFQ Items (809) Very High Deviation
(33) A Low Stock Point (0) Backorder (0) Demand Low (0) Infinity Check (0) IMM (0) New (1) On Reserve (1) RTFB Simulations (0) RTFB Simulations (0) Trend Down
(228) Low Stock Point (0) Constrained SOQ (427) Dependent Demand (0) Kits (0) New Seasonal Profiles (402) Out Before Delivery (0) OUTF Max (0) Schedule Conflict (0) Trend Up
(1347) Active (1347) Deactivate (0) Event Buy (0) Event Flow (7) Large SOQ (448) No Forecast (0) Price Decrease (3) Shelf Life (0) Unresolved
(0) Kit (0) LHM Test (0) Manual (26) Non-Stock (0) Watch (0)

Remember the item list defaults to the SOQ Items alert

Item ID: Description: Forward Buy Simulation Reassign Update Qty Clear Filtered Items Export View

Item	Description	Activity Code	SOQ	On Backorder	Days Delay	Units On Hand	Units On Order	Forecast Weekly
ALG704	Actinovate L&G 18 oz	A - Active	0	0	-7	4.00	0	
ALG704C	Actinovate L&G 18 oz (CA)	A - Active	0	0		0.00	1	0.00
ASP704	Actinovate SP 18 oz	A - Active	0	0		0.00	0	
ASP704C	Actinovate SP 18 oz (CA)	A - Active	0	0	181	13.00	0	0.00
AZE708	MGK Azera 8 oz	A - Active	0	0		0.00	0	
AZE732	MGK Azera qt	A - Active	1	0	-7	2.00	0	
BB200	B Boy DeChl & Sed filtr	A - Active	0	0	57	0.00	1	0.10
BB201	B Boy Garden Hose Conn Kit	A - Active	0	0	283	4.00	0	0.00

Page size: All 1497 items in 1 pages

Don't immediately select the All Items or Active alerts, it could take several seconds to load hundreds or thousands of items



Item Filter on an Order

Filtering for item COK100

The screenshot shows the 'Order Items' section of an SAP system. At the top, there are 'Less' and 'More' buttons. Below is a grid of order items with columns for quantity, status, and description. A search bar at the bottom left contains 'Item ID: COK100' and a 'Description:' field. To the right of the search bar are buttons for 'Forward Buy Simulation', 'Reassign', 'Update Qty', and 'Clear Filtered Items'. Below the search bar, a message box states 'No records to display.' The table below the search bar has columns for 'Item', 'Description', 'Activity Code', 'SOQ', 'On Backorder', and 'Days Delay'.

Item	Description	Activity Code	SOQ	On Backorder	Days Delay
(1497) All Items	(0) Activate	(0) Deals	(0) Fwd Buy	(0) LSPADJ	(0) Non-Scheduled
(280) SOQ Items	(0) "A" Missed Service	(0) Demand High	(0) Holiday Calendar	(0) Missed Service	(0) On Hold
(33) "A" Low Stock Point	(0) Backorder	(0) Demand Low	(0) Infinity Check	(0) (1) On Reserve	(1) On Reserve
(228) Low Stock Point	(0) Constrained SOQ	(427) Dependent Demand	(0) IMM	(3) New	(402) Out Before Delivery
	(485) Constrained Supply	(0) Event Buy	(0) Kits	(0) New Seasonal Profiles	(0) OUTL Max
	(0) Deactivate	(0) Event Flow	(7) Large SOQ	(448) No Forecast	(0) Price Decrease
(1347) Active	(1347) Active / Watch	(0) Kit	(0) LHM Test	(0) Manual	(26) Non-Stock

Enter the item in the Item ID filter or use the Description filter and select the filter icon ✓

If the item is not found, keep the item in the filter and now select the All Item or Active alert

Item Filter on an Order

Filtering for item COK100

Order Items

Less More

(1497)	All Items	(0)	Activate	(0)	Deals	(0)	Fwd Buy	(0)	LSPADJ	(0)	Non-Scheduled	(3)	Promo
(280)	SOQ Items	(0)	"A" Missed Service	(0)	Demand High	(0)	Holiday Calendar	(0)	Missed Service	(0)	On Hold	(0)	RFQ Av
(33)	"A" Low Stock Point	(0)	Backorder	(0)	Demand Low	(0)	Infinity Check	(0)		(1)	On Reserve	(0)	RFQ To
(228)	Low Stock Point	(0)	Constrained SOQ	(427)	Dependent Demand	(0)	IMM	(3)	New	(402)	Out Before Delivery	(0)	RTFB S
		(485)	Constrained Supply	(0)	Event Buy	(0)	Kits	(0)	New Seasonal Profiles	(0)	OUTL Max	(0)	Schedu
		(0)	Deactivate	(0)	Event Flow	(7)	Large SOQ	(448)	No Forecast	(0)	Price Decrease	(3)	Shelf L
(1347)	Active	(1347)	Active / Watch	(0)	Kit	(0)	LHM Test	(0)	Manual	(26)	Non-Stock	(0)	Watch

Item ID: COK100 Description:

Forward Buy Simulation Reassign Update Qty Clear Filtered Items Export

<input checked="" type="checkbox"/>	<input type="checkbox"/>	Item	Description	Activity Code	SOQ	<input type="checkbox"/>	On Backorder	Days Delay	Units O
<input type="checkbox"/>	<input type="checkbox"/>	COK100	CIRRUS 1K 240V	A - Active	<input type="text" value="0"/>	<input type="checkbox"/>	0		

Item result returns immediately verses selecting All Item or Active and then filtering the item again

Apply Filter Clear Filter

Supplier and Item Lookup



Quick search option on Supplier Manager and Item screens

> [Supplier List](#) > [Supplier Manager](#)

Supplier Information

Supplier ID: JOYELE

Add/Edit Ship Points: Default

Location: 011

Member of Group: None

Supplier Name:

Address:

City:

State:

> [Item List](#) > [Item Forecast](#)

Simple access to a different supplier or item

> [Item List](#) > [Item Manager](#)

Item Information

Item ID: 016010VT-50

Supplier ID: JOYELE

Supplier Name: Joyo Electric Appliance Mfg. Ltd

Ship Point: Kitting

Location: 010

Description: Vinyl Tubing 1/4", 50'

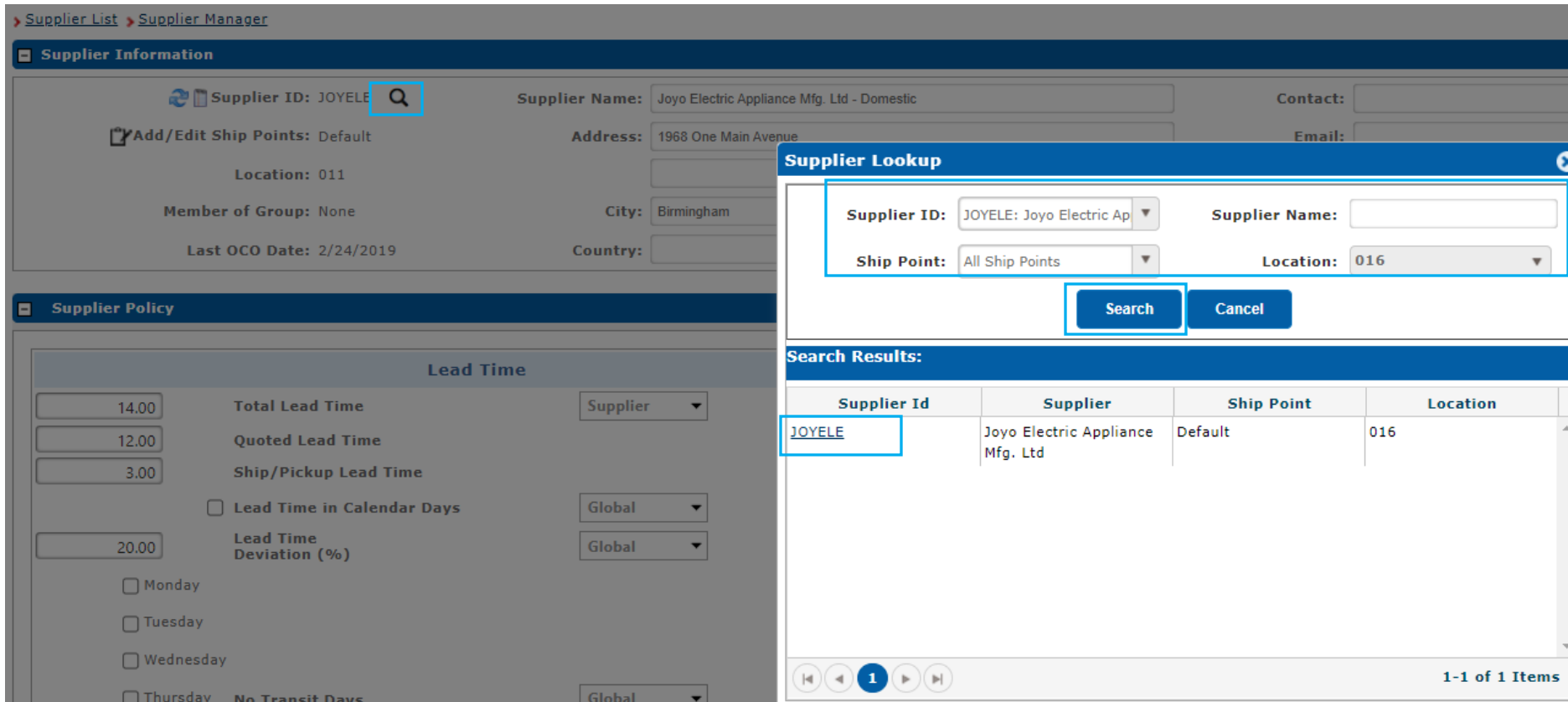
UPC:

Manufacturing ID:

Activity Code

Supplier Lookup

Supplier JOYELE, Ship Point Default, Location 011



The screenshot displays a software interface with a 'Supplier Information' form and a 'Supplier Lookup' dialog box. The 'Supplier Information' form includes fields for Supplier ID (JOYELE), Supplier Name (Joyo Electric Appliance Mfg. Ltd - Domestic), Address (1968 One Main Avenue), City (Birmingham), and Location (011). The 'Supplier Lookup' dialog box has search criteria for Supplier ID (JOYELE: Joyo Electric Ap), Ship Point (All Ship Points), and Location (016). Below the dialog is a 'Search Results' table with one entry for JOYELE.

Supplier Id	Supplier	Ship Point	Location
JOYELE	Joyo Electric Appliance Mfg. Ltd	Default	016

Search by one or more of these options


Select the Supplier ID link to go to this supplier manager screen

Supplier Lookup

Screen refreshes on the supplier selected, Supplier JOYELE, Ship Point Default, **Location 016**

[Supplier List](#) > [Supplier Manager](#)

Supplier Information

  **Supplier ID:** JOYELE 

 **Add/Edit Ship Points:** Default

Location: 016

Member of Group: None

Supplier Name:

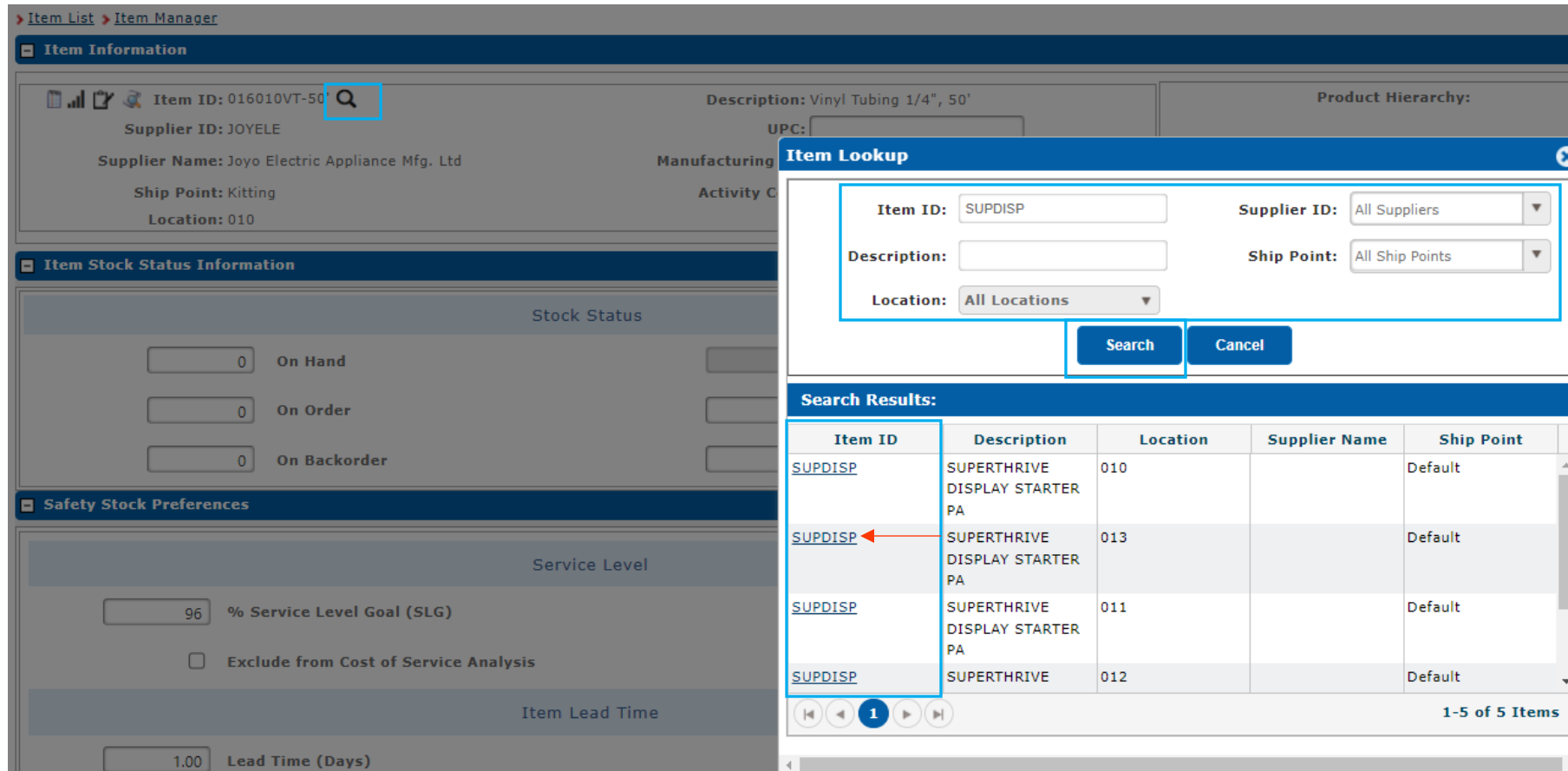
Address:

City:

State:

Item Lookup

Supplier JOYELE, Ship Point Default, Location 011



The screenshot shows the 'Item Manager' interface with an 'Item Lookup' dialog box. The dialog box has the following fields:

- Item ID: SUPDISP
- Supplier ID: All Suppliers
- Description: (empty)
- Ship Point: All Ship Points
- Location: All Locations

Buttons: Search, Cancel

Search Results:

Item ID	Description	Location	Supplier Name	Ship Point
SUPDISP	SUPERTHRIVE DISPLAY STARTER PA	010		Default
SUPDISP	SUPERTHRIVE DISPLAY STARTER PA	013		Default
SUPDISP	SUPERTHRIVE DISPLAY STARTER PA	011		Default
SUPDISP	SUPERTHRIVE	012		Default

1-5 of 5 Items

Search by one or more of these options

Select the Item ID [link](#) to go to this item screen

Item Lookup

Screen refreshes on the item selected, **Item SUPDISP, Location 013**

[Item List](#) > [Item Manager](#) > [Item Manager](#)

Item Information

   	<input type="text" value="Item ID: SUPDISP"/> 	Description: SUPERTHRIVE DISPLAY STARTER PA
Supplier ID: ZZZZZZ	UPC: <input type="text"/>	
Supplier Name:	Manufacturing ID: <input type="text" value="SUPDISP"/>	
Ship Point: Default	Activity Code: <input type="text" value="D - Discontinued"/>	
<input type="text" value="Location: 013"/>		

Order Lookup

Option available on the Order List - **FUTURE**

[Order List](#) > [Order Summary](#)

 **Supplier:** 011 - Customer A Indiana 

LSPADJ

Low Stock Point Adjustment - A scheduled adjustment to an item's Low Stock Point (LSP)

- Relieve operations from receiving a large influx of product all at once
- Extra days of supply for a specified time
- Early seasonal purchase ahead of the profile

LSPADJ

Prior to LSPADJ you may have...

Artificially adjusting lead time

- Increases safety stock
- Does not work well with lead time forecasting
- You must remember to remove the extra lead time

Using Safety Stock Min

- You must remember to remove the safety stock min

Using Backorder, Reserve, and Hold Outs

- You must remember to remove these units from the Backorder or Reserve
- If interfaced fields for many customers
- Hold Outs are unit entry only, not days

LSPADJ

Benefits

- Automatically triggers earlier buying by increasing the item's LSP, this increases the item's OTP
- Start and End Dates are required, you don't have to remember to update
- Manage from the Supplier or Item levels
- Manually entered or Interfaced
- Days or Units
- Visibility on the OID screen, Order Summary, Supplier Manager, Item Manager
- OID grid – additional line for LSPADJ
- Included in the item's projections

Not buying more...buying earlier!

LSPADJ

Regular LSP, OTP, and OUTL build

Units	Cal Days	Sell Days	
0.00	0.00	0.00	SOQ
0.00	0.00	0.00	Maximum Qty (0.00)
0.00	0.00	0.00	Precision
0.00	0.00	0.00	Warehouse Multiple (0.00)
0.00	0.00	0.00	Buying Multiple (1.00)
0.00	0.00	0.00	Minimum Qty (0.00)
0.00	0.00	0.00	Days Adjusted (0)
0.00	0.00	0.00	Special Orders
0.00	0.00	0.00	Event (0.00)
0.00	0.00	0.00	Fwd Buy (0.00)
0.00	0.00	0.00	Need
42.00	26.14	18.14	Balance
42.00	26.14	18.14	On Hand
0.00	0.00	0.00	On Order
0.00	0.00	0.00	Backorder
0.00	0.00	0.00	Reserved
0.00	0.00	0.00	Held Qty (0.00)
41.00	25.83	17.83	Order Up To Level
0.00	0.00	0.00	Shelf Life (0.00)
11.57	7.00	5.00	Effective Order Cycle (0.00)
41.26	25.83	17.83	Order Trigger Point
11.57	7.00	5.00	Supplier Order Cycle
29.69	18.83	12.83	Low Stock Point
25.46	15.00	11.00	Lead Time
4.23	3.83	1.83	Safety Stock

With LSPADJ

Units	Cal Days	Sell Days	
11.00	6.67	4.67	SOQ
0.00	0.00	0.00	Maximum Qty (0.00)
0.00	0.00	0.00	Precision
0.00	0.00	0.00	Warehouse Multiple (0.00)
0.00	0.00	0.00	Buying Multiple (1.00)
0.00	0.00	0.00	Minimum Qty (0.00)
0.00	0.00	0.00	Days Adjusted (0)
0.00	0.00	0.00	Special Orders
0.00	0.00	0.00	Event (0.00)
0.00	0.00	0.00	Fwd Buy (0.00)
11.00	6.67	4.67	Need
42.00	26.14	18.14	Balance
42.00	26.14	18.14	On Hand
0.00	0.00	0.00	On Order
0.00	0.00	0.00	Backorder
0.00	0.00	0.00	Reserved
0.00	0.00	0.00	Held Qty (0.00)
53.00	32.83	22.83	Order Up To Level
0.00	0.00	0.00	Shelf Life (0.00)
11.57	7.00	5.00	Effective Order Cycle (0.00)
53.04	32.83	22.83	Order Trigger Point
11.57	7.00	5.00	Supplier Order Cycle
41.46	25.83	17.83	Low Stock Point
11.57	7.00	5.00	Low Stock Point Adj
25.46	15.00	11.00	Lead Time
4.43	3.83	1.83	Safety Stock

Balance reaches the OTP and LSP earlier with LSPADJ

LSPADJ

Order Summary item alert when LSPADJ dates are active AND the item is producing a SOQ

Order Items											
Less		More									
(5)	All Items	(0)	Activate	(0)	Deals	(0)	Fwd Buy	(1)	LSPADJ	(0)	Non-Scheduled
(1)	SOQ Items	(0)	"A" Missed Service	(0)	Demand High	(0)	Holiday Calendar	(0)	Missed Service	(0)	On Hold
(0)	"A" Low Stock Point	(0)	Backorder	(0)	Demand Low	(0)	Infinity Check	(0)		(0)	On Reserve
(0)	Low Stock Point	(0)		(0)	Dependent Demand	(0)	IMM	(2)	New	(0)	Out Before Delivery
		(0)	Deactivate	(0)	Event Buy	(0)	Kits	(0)	New Seasonal Profiles	(0)	OUTL Max
						(0)	Event Flow	(0)	Large SOQ	(2)	No Forecast
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Item	Description	Activity Code	SOQ						
<input type="checkbox"/>	<input type="checkbox"/>	BLG801	BL Gloves S 100 Pk	A - Active	<input type="text" value="11"/>						

LSPADJ

Supplier Manager

Add LSPADJ ✕

LSPADJ Name:

LSPADJ: Selling Days ▼

LSPADJ Start Date: Selling Days

LSPADJ End Date: Units

Update
Cancel

	LSPADJ Name	LSPADJ	LSPADJ Type	LSPADJ Start Date	LSPADJ End Date	
✎ ✕	LSPADJ - Supplier Example	50	Units	10/1/2022	10/31/2022	+ Add LSPADJ

✎ ✕ Edit and Delete options

	LSPADJ Name	LSPADJ	LSPADJ Type	LSPADJ Start Date	LSPADJ End Date	Value From	
✎ ✕	LT ADJ	5	Selling Days	9/2/2022	9/30/2022	Item	+ Add LSPADJ

Item Manager

Add LSPADJ ✕

LSPADJ Name:

LSPADJ: Selling Days ▼

LSPADJ Start Date: Selling Days

LSPADJ End Date: Units

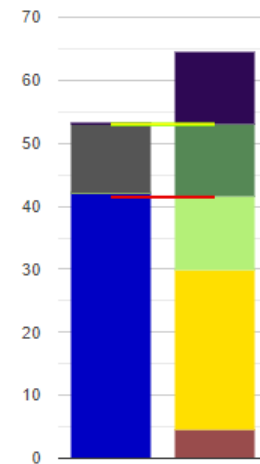
Value From: Supplier ▼

Update

LSPADJ

Units	Cal Days	Sell Days	
11.00	6.67	4.67	SOQ
0.00	0.00	0.00	Maximum Qty (0.00)
0.00	0.00	0.00	Precision
0.00	0.00	0.00	Warehouse Multiple (0.00)
0.00	0.00	0.00	Buying Multiple (1.00)
0.00	0.00	0.00	Minimum Qty (0.00)
0.00	0.00	0.00	Days Adjusted (0)
0.00	0.00	0.00	Special Orders
0.00	0.00	0.00	Event (0.00)
0.00	0.00	0.00	Fwd Buy (0.00)
11.00	6.67	4.67	Need
42.00	26.14	18.14	Balance
42.00	26.14	18.14	On Hand
0.00	0.00	0.00	On Order
0.00	0.00	0.00	Backorder
0.00	0.00	0.00	Reserved
0.00	0.00	0.00	Held Qty (0.00)
53.00	32.83	22.83	Order Up To Level
0.00	0.00	0.00	Shelf Life (0.00)
11.57	7.00	5.00	Effective Order Cycle (0.00)
53.04	32.83	22.83	Order Trigger Point
11.57	7.00	5.00	Supplier Order Cycle
41.46	25.83	17.83	Low Stock Point
11.57	7.00	5.00	Low Stock Point Adj
25.46	15.00	11.00	Lead Time
4.43	3.83	1.83	Safety Stock

Order Detail [Hide](#)



Item Details

50.92 Monthly Forecast
 None Seasonal Monthly Forecast
 None IBP Monthly Forecast
 95.00 Service Level Goal
 \$110.60 Selling Unit Cost
 Alternate Cost
 \$110.60 Effective Cost
 0.00 Dependent Demand
Recent Demand History
 0.00 Demand MTD
 59.42 5/1/2022
 35.83 4/1/2022
 48.00 3/1/2022
 14.17 2/1/2022

LSPADJ Name	LSPADJ	LSPADJ Type	LSPADJ Start Date	LSPADJ End Date
LT ADJ	5	Selling Days	9/2/2022	9/30/2022

[View All LSPADJ For This Item](#)

Custom Groups

Ability to view and manage items that have no common thread

[Custom Group List](#) > [Custom Group Manager](#)

Group

Group Name: **Group Description:** **Group Type:** ▼

Public: **Created By:**

Sub Groups

Name: North	Description: North Region	Location(s): 3	<input type="button" value="View Details"/>	<input type="button" value="Delete"/>
Name: South	Description: South Region	Location(s): 2	<input type="button" value="View Details"/>	<input type="button" value="Delete"/>
Name: East	Description: East Region	Location(s): 2	<input type="button" value="View Details"/>	<input type="button" value="Delete"/>

Custom Groups

Order List Filters [X]

Supplier Name:

Supplier ID: All Suppliers ▼

Ship Point: All Ship Points ▼

Location: All Locations ▼

Item Custom Group: ▼

Location Custom Group: ▼

Approval Status: All ▼

Order Status: All ▼

PO Number:

Order Policy: All Order Policies ▼

Supplier List Filters [X]

Supplier Name:

Supplier Setup: All ▼

Supplier ID: All Suppliers ▼

Ship Point: All Ship Points ▼

Location: All Locations ▼

Supplier Group: All ▼

Item Custom Group: ▼

Location Custom Group: ▼

Buyer:

Order Cycle: Region

North

South

East

Total Lead Time:

Quoted Lead Time:

Lead Time Deviation %:

Total # of Items: Less Than ▼

Supplier Group 1:

Supplier Group 2:

Supplier Group 3:

Apply Filters Clear Filters Close

Item List Filters [X]

Supplier Name:

Supplier Setup: All ▼

Supplier ID: All Suppliers ▼

Ship Point: All Ship Points ▼

Location: All Locations ▼

Item ID:

Item Description:

Item Custom Group: ▼

Location Custom Group:

Activity Code: Super A

Velocity Code: Overstock

Buyer: Overstock %

Overstock\$

Forecast Method:

Item Class:

Primary Vendor:

Primary Buyer:

Group 4:

Apply Filters Clear Filters Close

Custom Groups

Item Filters

Supplier Name:	<input type="text"/>	Item ID:	<input type="text"/>	Group 1:	<input type="text"/>
Supplier ID:	Please select a Supplier ▼	Item Description:	<input type="text"/>	Group 2:	<input type="text"/>
Supplier Setup:	All ▼	Activity Code:	<input type="text"/>	Group 3:	<input type="text"/>
Ship Point:	All Ship Points ▼	Supplier Group 1:	<input type="text"/>	Group 4:	<input type="text"/>
Location:	All Locations ▼	Supplier Group 2:	<input type="text"/>	Group 5:	<input type="text"/>
Velocity Code:	All Velocity Classes ▼	Supplier Group 3:	<input type="text"/>	Group 6:	<input type="text"/>
Buyer:	All Buyers ▼	Item Custom Group:	<input type="text"/>	Location Custom Group:	<input type="text"/>

Apply Filters



Clear Filters

[Mass Maintenance](#) > [Mass Maintenance Request](#)

1. Provide a name for this update and choose when changes should be performed:

Name:	<input type="text" value="Forecast Test"/>
Run:	<input checked="" type="radio"/> Immediate <input type="radio"/> Scheduled

2. Select records to change:

[1 results]  

<input checked="" type="checkbox"/>	Item: Item ID	▼	Equals	▼	SAM930D	AND
<input checked="" type="checkbox"/>	Supplier: Location	▼	Equals	▼	011	AND
<input checked="" type="checkbox"/>	Custom Groups	▼	Equals	▼	<input type="text"/>	
	Item: Custom Groups					
	Location: Custom Groups					

Projections

Pull and export future Projections at various levels for specified time frames

[Projection List](#) > [Projection Detail](#)

[Export](#) [Update](#)



Projection Name: <input type="text"/>		Description: <input type="text"/>	
Projection Type <input type="checkbox"/> Sales <input type="checkbox"/> On Order <input type="checkbox"/> Purchases <input type="checkbox"/> Backorder <input type="checkbox"/> Receipts <input type="checkbox"/> On Hand		Projection Rollup Item <input type="text"/> Accumulate By Week <input type="text"/>	Projection Unit Unit <input type="text"/> Output Excel <input type="text"/>
		Projection Time Frame Start Date <input type="text"/> End Date <input type="text"/> Or Next 52 Weeks <input type="text"/>	

Projections

[Projection List](#) > [Projection Detail](#)

[Export](#)  [Update](#) 

Projection Name: Description:

Projection Type <input type="checkbox"/> Sales <input type="checkbox"/> On Order <input type="checkbox"/> Purchases <input type="checkbox"/> Backorder <input type="checkbox"/> Receipts <input type="checkbox"/> On Hand	Projection Rollup <input type="text" value="Item"/>	Projection Unit <input type="text" value="Unit"/>	Projection Time Frame Start Date <input type="text"/>  End Date <input type="text"/>  Or Next <input type="text" value="52"/> <input type="text" value="Weeks"/>
	Accumulate By <input type="text" value="Week"/>	Output <input type="text" value="Excel"/>	

Projection Type

- Sales – forecast
- Purchases - SOQs
- Receipts – SOQ expected delivery dates
- On Order
- Backorder
- On Hand

Projection Rollup

- Item
- Supplier
- Location
- Category
- Product Line 1
- Product Line 2
- Group 4
- Group 5
- Demand Type

Accumulate By

- Week
- 4 Week
- Calendar Month

Projection Unit








- Amount
- Unit
- Weight
- Net Weight
- Cube
- Cases
- Layers
- Pallets
- Cube Adj Weight
- Dozen
- Other

Output

Projections

[Projection List](#) > [Projection Detail](#)

[Export](#)  [Update](#) 


Projection Name: <input type="text"/>		Description: <input type="text"/>	
Projection Type <input type="checkbox"/> Sales <input type="checkbox"/> On Order <input type="checkbox"/> Purchases <input type="checkbox"/> Backorder <input type="checkbox"/> Receipts <input type="checkbox"/> On Hand	Projection Rollup <input type="text" value="Item"/>  Accumulate By <input type="text" value="Week"/> 	Projection Unit <input type="text" value="Unit"/>  Output <input type="text" value="Excel"/> 	Projection Time Frame Start Date <input type="text"/>  End Date <input type="text"/>  Or Next <input type="text" value="52"/> <input type="text" value="Weeks"/> 


Use the Start Date and End Date


OR the

Next X Days, Weeks, Months

Projection Time Frame

Start Date 

End Date 

Or Next 

- Days
- Weeks**
- month(s)

Projection Name: **Description:**

Projection Type <input type="checkbox"/> Sales <input type="checkbox"/> On Order <input checked="" type="checkbox"/> Purchases <input type="checkbox"/> Backorder <input type="checkbox"/> Receipts <input type="checkbox"/> On Hand	Projection Rollup <input type="text" value="Item"/>	Projection Unit <input type="text" value="Cases"/>	Projection Time Frame Start Date <input type="text" value="10/1/2022"/> End Date <input type="text" value="12/31/2022"/> Or Next <input type="text" value="52"/> <input type="text" value="Weeks"/>
	Accumulate By <input type="text" value="Calendar Month"/>	Output <input type="text" value="Excel"/>	

Item(s)
[Filter Items](#) **List Filtered By: Supplier: 3560; Vendor 3560; Activity Codes: A - Active,W - Watch;**

Item ID	Item Description	Ship Point	Location	Supplier	Activity Code	Velocity Code	Category	Product Line 1	Product Line 2	Group 4	Group 5	Demand Type
001	SLEEVE INSUL 8 IN R-6	Default	DC1	3560	A - Active	D	SUPPLIES	DUCT ACCESSORIES	FLEX DUCT			Steady
001	SLEEVE INSUL 8 IN R-6	Default	DC1_m	3560	A - Active	D	SUPPLIES	DUCT ACCESSORIES	FLEX DUCT		Mike	Steady
001	SLEEVE INSUL 8 IN R-6	Default	DC1_s	3560	A - Active	D	SUPPLIES	DUCT ACCESSORIES	FLEX DUCT		Sven	Steady
195	FURNACE MOUNTING BLOCK	Default	DC1	3560	A - Active	D	SUPPLIES	HVAC ACCESSORIES	MISC.		P2	
195	FURNACE MOUNTING BLOCK	Default	WH1	3560	A - Active	D	SUPPLIES	HVAC ACCESSORIES	MISC.		P2	
195	FURNACE MOUNTING BLOCK	Default	WH2	3560	A - Active	D	SUPPLIES	HVAC ACCESSORIES	MISC.		P2	
195	FURNACE MOUNTING BLOCK	Default	DC1_m	3560	A - Active	D	SUPPLIES	HVAC ACCESSORIES	MISC.		Mike	
195	FURNACE MOUNTING BLOCK	Default	WH1_m	3560	A - Active	D	SUPPLIES	HVAC ACCESSORIES	MISC.		Mike	
195	FURNACE MOUNTING BLOCK	Default	WH2_m	3560	A - Active	D	SUPPLIES	HVAC ACCESSORIES	MISC.		Mike	
195	FURNACE MOUNTING BLOCK	Default	DC1_s	3560	A - Active	D	SUPPLIES	HVAC ACCESSORIES	MISC.		Sven	
195	FURNACE MOUNTING BLOCK	Default	WH1_s	3560	A - Active	D	SUPPLIES	HVAC ACCESSORIES	MISC.		Sven	
195	FURNACE MOUNTING BLOCK	Default	WH2_s	3560	A - Active	D	SUPPLIES	HVAC ACCESSORIES	MISC.		Sven	
196	HEAT PUMP RISERS	Default	DC1	3560	A - Active	D	SUPPLIES	HVAC ACCESSORIES	MISC.		P2	
196	HEAT PUMP RISERS	Default	WH1	3560	A - Active	D	SUPPLIES	HVAC ACCESSORIES	MISC.		P2	
196	HEAT PUMP RISERS	Default	WH2	3560	A - Active	D	SUPPLIES	HVAC ACCESSORIES	MISC.		P2	
196	HEAT PUMP RISERS	Default	DC1_m	3560	A - Active	D	SUPPLIES	HVAC ACCESSORIES	MISC.		Mike	
196	HEAT PUMP RISERS	Default	WH1_m	3560	A - Active	D	SUPPLIES	HVAC ACCESSORIES	MISC.		Mike	
196	HEAT PUMP RISERS	Default	WH2_m	3560	A - Active	D	SUPPLIES	HVAC ACCESSORIES	MISC.		Mike	
196	HEAT PUMP RISERS	Default	DC1_s	3560	A - Active	D	SUPPLIES	HVAC ACCESSORIES	MISC.		Sven	

Projections

[Projection List](#) > [Projection Detail](#)

Update Successful **Export in progress...** [Cancel](#) [Update](#)

Projection Name: Q4 Purchases 3560 **Description:** Supplier 3560 Q4 purchases


Projection Type	Projection Rollup	Projection Unit	Projection Time Frame	
<input type="checkbox"/> Sales <input type="checkbox"/> On Order	Item	Cases	Start Date: 10/1/2022	End Date: 12/31/2022
<input checked="" type="checkbox"/> Purchases <input type="checkbox"/> Backorder			Next: 0	Days
<input type="checkbox"/> Receipts <input type="checkbox"/> On Hand				

Item(s)
[Filter Items](#) **List Filtered By:** Supplier: 3560: Vendor 3560; Activity Codes: A - Active,W - Watch;

Download File

The file you have exported is ready to download. Would you like to download it?

[OK](#) [Cancel](#)

 Q4 Purchases 3560.csv ^



Projections

Loads with a lot of details...

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W
1	Report Name:Q4 Purchases 3560																						
2	Rollup: Item																						
3	Accumulate By: Calendar Month																						
4	Unit: Cases																						
5	From: 10/1/2022																						
6	To: 12/31/2022																						
7	Filter Items: ActivityClass:Active,Watch;Supplier: 3560: Vendor 3560;																						
8	Type	Start	End	Location	N Buyer	SourceId	Supplier	Activity	Velocity	Group01	Group02	Group03	Group04	Group05	Group06	ItemNum	ItemDescr	UPC	Manufact	LT	[10/01/2022]	[11/01/2022]	[12/01/2022]
9	Purchases	10/1/2022	12/31/2022	DC1	Blue Ridg	3560	Vendor 35 A - Active	D		SUPPLIES	DUCT ACC	FLEX DUCT			Steady	001	SLEEVE IN			12	930	960	630
10	Purchases	10/1/2022	12/31/2022	DC1	Blue Ridg	3560	Vendor 35 A - Active	D		SUPPLIES	HVAC ACC	MISC.		P2		195	FURNACE			12	3312	3312	3240
11	Purchases	10/1/2022	12/31/2022	DC1	Blue Ridg	3560	Vendor 35 A - Active	D		SUPPLIES	HVAC ACC	MISC.		P2		196	HEAT PUM			17	720	672	432
12	Purchases	10/1/2022	12/31/2022	DC1	Blue Ridg	3560	Vendor 35 A - Active	D		SUPPLIES	HVAC ACC	DRAIN PA		P2		197	3 IN PUMF			12	320	512	224
13	Purchases	10/1/2022	12/31/2022	DC1	Blue Ridg	3560	Vendor 35 A - Active	D		PARTS	A/C COMF	MISC.		P2		198	DRAIN GU			14	400	300	400
14	Purchases	10/1/2022	12/31/2022	DC1	Blue Ridg	3560	Vendor 35 A - Active	C		SUPPLIES	HVAC ACC	UNIT PAD		P2		199	PLASTIC P.			16	480	360	360
15	Purchases	10/1/2022	12/31/2022	DC1	Blue Ridg	3560	Vendor 35 A - Active	D		SUPPLIES	HVAC ACC	MISC.		P2		200	FUSE REDU			12	120	210	150
16	Purchases	10/1/2022	12/31/2022	WH1	Blue Ridg	3560	Vendor 35 A - Active	D		SUPPLIES	HVAC ACC	MISC.		P2		195	FURNACE			12	2664	2736	2664
17	Purchases	10/1/2022	12/31/2022	WH1	Blue Ridg	3560	Vendor 35 A - Active	D		SUPPLIES	HVAC ACC	MISC.		P2		196	HEAT PUM			17	864	336	720

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Report Name:Q4 Purchases 3560													
2	Rollup: Item													
3	Accumulate By: Calendar Month													
4	Unit: Cases													
5	From: 10/1/2022													
6	To: 12/31/2022													
7	Filter Items: ActivityClass:Active,Watch;Supplier: 3560: Vendor 3560;													

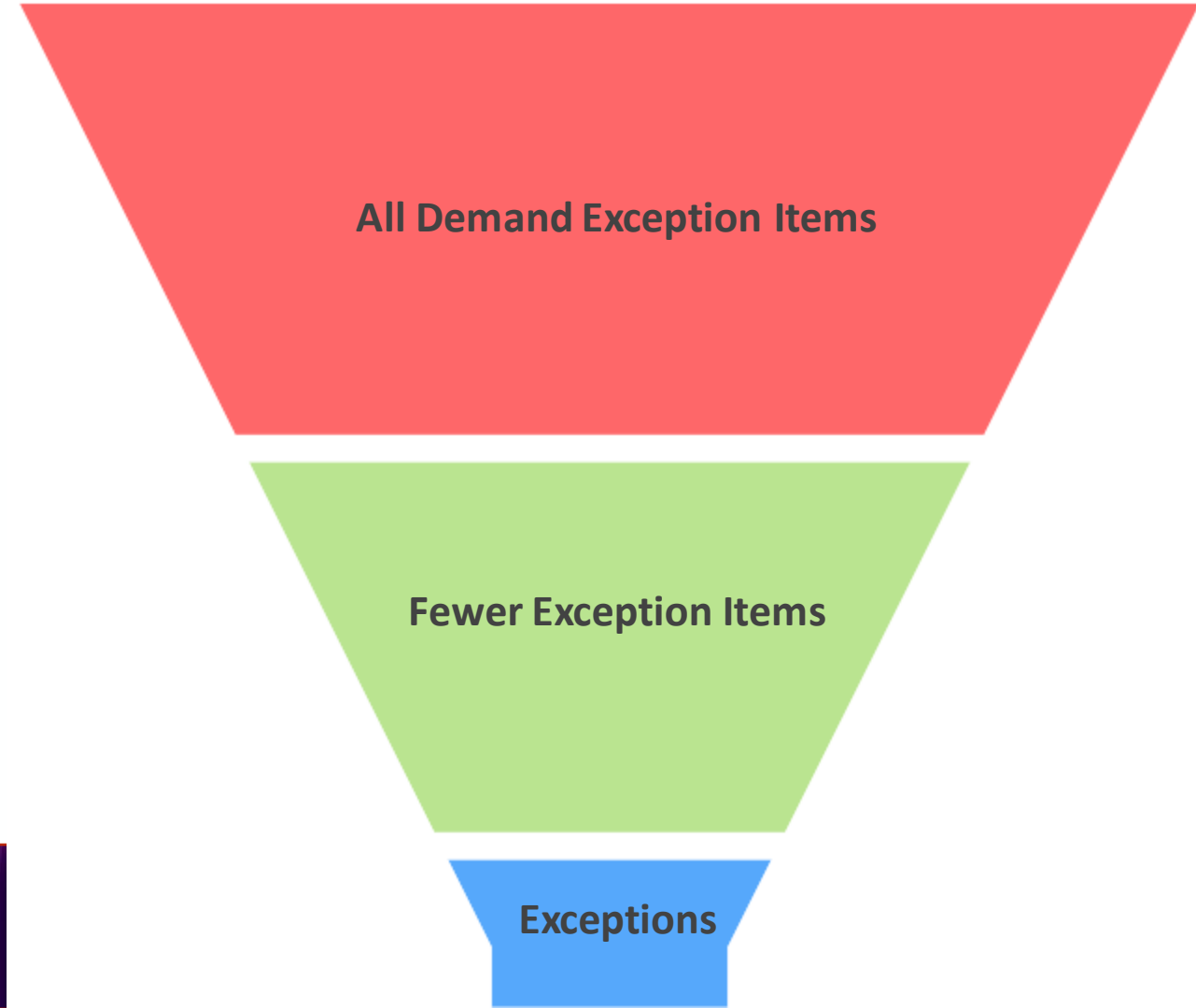
Projected SOQs by month

Type	Start	End	LocationName	Sourceld	Supplier	Group01	ItemNumber	ItemDescription	UPC	Manufacturer ID	[10/01/2022]	[11/01/2022]	[12/01/2022]
Purchases	10/1/2022	12/31/2022	DC1	3560	Vendor 3560	SUPPLIES	001	SLEEVE INSUL 8 IN R-6			930	960	630
Purchases	10/1/2022	12/31/2022	DC1	3560	Vendor 3560	SUPPLIES	195	FURNACE MOUNTING BLOCK			3312	3312	3240
Purchases	10/1/2022	12/31/2022	DC1	3560	Vendor 3560	SUPPLIES	196	HEAT PUMP RISERS			720	672	432
Purchases	10/1/2022	12/31/2022	DC1	3560	Vendor 3560	SUPPLIES	197	3 IN PUMP UP LEG			320	512	224
Purchases	10/1/2022	12/31/2022	DC1	3560	Vendor 3560	PARTS	198	DRAIN GUN CO2 CARTRIDGE			400	300	400
Purchases	10/1/2022	12/31/2022	DC1	3560	Vendor 3560	SUPPLIES	199	PLASTIC PAD 32X32X2			480	360	360
Purchases	10/1/2022	12/31/2022	DC1	3560	Vendor 3560	SUPPLIES	200	FUSE REDUCER 30 TO 60 250VOLT			120	210	150
Purchases	10/1/2022	12/31/2022	WH1	3560	Vendor 3560	SUPPLIES	195	FURNACE MOUNTING BLOCK			2664	2736	2664
Purchases	10/1/2022	12/31/2022	WH1	3560	Vendor 3560	SUPPLIES	196	HEAT PUMP RISERS			864	336	720
Purchases	10/1/2022	12/31/2022	WH1	3560	Vendor 3560	SUPPLIES	197	3 IN PUMP UP LEG			480	192	448
Purchases	10/1/2022	12/31/2022	WH1	3560	Vendor 3560	PARTS	198	DRAIN GUN CO2 CARTRIDGE			300	300	300
Purchases	10/1/2022	12/31/2022	WH1	3560	Vendor 3560	SUPPLIES	199	PLASTIC PAD 32X32X2			408	288	312
Purchases	10/1/2022	12/31/2022	WH1	3560	Vendor 3560	SUPPLIES	200	FUSE REDUCER 30 TO 60 250VOLT			190	80	170
Purchases	10/1/2022	12/31/2022	WH2	3560	Vendor 3560	SUPPLIES	195	FURNACE MOUNTING BLOCK			2520	1656	1368
Purchases	10/1/2022	12/31/2022	WH2	3560	Vendor 3560	SUPPLIES	196	HEAT PUMP RISERS			384	336	288
Purchases	10/1/2022	12/31/2022	WH2	3560	Vendor 3560	SUPPLIES	197	3 IN PUMP UP LEG			416	192	160
Purchases	10/1/2022	12/31/2022	WH2	3560	Vendor 3560	PARTS	198	DRAIN GUN CO2 CARTRIDGE			300	300	0
Purchases	10/1/2022	12/31/2022	WH2	3560	Vendor 3560	SUPPLIES	199	PLASTIC PAD 32X32X2			312	192	144
Purchases	10/1/2022	12/31/2022	WH2	3560	Vendor 3560	SUPPLIES	200	FUSE REDUCER 30 TO 60 250VOLT			90	80	60
Purchases	10/1/2022	12/31/2022	DC1_m	3560	Vendor 3560	SUPPLIES	001	SLEEVE INSUL 8 IN R-6			1080	480	810
Purchases	10/1/2022	12/31/2022	DC1_s	3560	Vendor 3560	SUPPLIES	001	SLEEVE INSUL 8 IN R-6			1080	480	810
Purchases	10/1/2022	12/31/2022	DC1_m	3560	Vendor 3560	SUPPLIES	195	FURNACE MOUNTING BLOCK			4176	2232	3456
Purchases	10/1/2022	12/31/2022	WH1_m	3560	Vendor 3560	SUPPLIES	195	FURNACE MOUNTING BLOCK			2808	2808	2592
Purchases	10/1/2022	12/31/2022	WH2_m	3560	Vendor 3560	SUPPLIES	195	FURNACE MOUNTING BLOCK			2304	1656	2304
Purchases	10/1/2022	12/31/2022	DC1_s	3560	Vendor 3560	SUPPLIES	195	FURNACE MOUNTING BLOCK			4176	2232	3456
Purchases	10/1/2022	12/31/2022	WH1_s	3560	Vendor 3560	SUPPLIES	195	FURNACE MOUNTING BLOCK			2808	2808	2592
Purchases	10/1/2022	12/31/2022	WH2_s	3560	Vendor 3560	SUPPLIES	195	FURNACE MOUNTING BLOCK			2304	1656	2304
Purchases	10/1/2022	12/31/2022	DC1_m	3560	Vendor 3560	SUPPLIES	196	HEAT PUMP RISERS			1200	432	480
Purchases	10/1/2022	12/31/2022	WH1_m	3560	Vendor 3560	SUPPLIES	196	HEAT PUMP RISERS			816	336	720
Purchases	10/1/2022	12/31/2022	WH2_m	3560	Vendor 3560	SUPPLIES	196	HEAT PUMP RISERS			720	288	336
Purchases	10/1/2022	12/31/2022	DC1_s	3560	Vendor 3560	SUPPLIES	196	HEAT PUMP RISERS			1200	432	480
Purchases	10/1/2022	12/31/2022	WH1_s	3560	Vendor 3560	SUPPLIES	196	HEAT PUMP RISERS			816	336	720

Exception Optimization

Lots of Exceptions?






















Exception rules are parameters that filter out those forecast exception items you do not want to include in the Dashboard period-end forecast exception lists.



Exception Optimization

1

Exception Rules Editor Add Exception Rule

	ID	Description	Created	User Name	Override exists
  	1	Weekly FCast Less Than 3	4/5/2019	Ridge, Blue	No
  	2	Food And Stuff	4/5/2019	Ridge, Blue	No
  	4	Dwight's Exception	4/5/2019	Ridge, Blue	No
  	5	Customer A Indiana FC less than .01	4/12/2022	Blue Ridge	No
  	6	New Hose Clamps	12/10/2019	Swaney, Barry	No
  	7	Slow Movers Exclusion	12/10/2019	Ridge, Blue	No
  	9	slow movers	4/12/2022	Blue Ridge	No

1-7 of 7 Items

Exception Optimization

2

☐
Order Comparison

OR AND

Order Up to level change in: Percentage:






















Order Up to level change in: Currency:





Order Up to level change in: Buying Multiple:

Element	Description
Order Up To Level Change in < > Percentage	Exclude exceptions that change the OUTL units by less than the specified percentage.
Order Up To Level Change in < > Currency	Exclude exceptions that change the OUTL by less than the specified amount in local currency.
Order Up To Level Change in < > Buying Multiple	Excludes exceptions that change the OUTL by less than the specified number of buying multiples.
And / Or	Specifies whether you want to apply these comparison parameters individually or together. <ul style="list-style-type: none"> » And – The item must meet both/all parameters. » Or – The item must meet either/all parameters.


Exception Optimization

Exception Rules Editor

	ID	Description	Created
  	1	Weekly FCast Less Than 3	4/5/2019
  	2	Food And Stuff	4/5/2019
  	4	Dwight's Exception	4/5/2019
  	5	Customer A Indiana FC less than .01	4/12/2022
  	6	New Hose Clamps	12/10/2019
  	7	Slow Movers Exclusion	12/10/2019
  	9	slow movers	4/12/2022

Navigation:   **1**  

ID: 7 Description: Slow Movers Exclusion **Cancel** **Save Exception Rule** **Edit Override**



- Item: 4Weekly Forecast Is Less Than 4
- Item: Selling Unit Cost Equals 5
- Supplier: Location Equals 011

OR

- Item: Velocity Code Is D Velocity Code
- Item: Velocity Code Is E Velocity Code

AND

Exception Optimization

ID: 7 Description : Slow Movers Exclusion **Cancel** **Save Exception Rule** **Add Override**

<input type="checkbox"/>	Item: 4Weekly Forecast	▼	Is Less Than	▼	4	▲▼	OR
<input type="checkbox"/>	Item: Selling Unit Cost	▼	Equals	▼	5	▲▼	AND
<input type="checkbox"/>	Supplier: Location	▼	Equals	▼	011		
OR							
<input type="checkbox"/>	Item: Velocity Code	▼	Is	▼	D Velocity Code	▼	AND
<input type="checkbox"/>	Item: Velocity Code	▼	Is	▼	E Velocity Code	▼	

Filters – high level to very granular

Exception Optimization

▼ Demand Exceptions

Demand High	129
Demand Low	12
Trending Up	13
Trending Down	26
Missed Service	0
Infinity Check	1

SCA fields to include/exclude on reports

Y/N	DemandExceptionsExcluded	T	ExceptionRule	T	ExclusionLevel
-----	--------------------------	---	---------------	---	----------------

← Exceptions won't alert on the Dashboard but still display on the Item Forecast screen

[Item List](#) > [Item Forecast](#)

UPC: 8510540066

Item ID: FFC204 Description: FF FloraCap 2.0 4 Supplier: 016 Supplier Name: Customer A North California Ship Point:
PDI Code On Hand 0.0000 On Order 0.0000 Lead Time 7

29 📈 Trend 96.00% Service Level Goal A - Active Activity Code No Profile Selected Seasonal Profile
17.10% Deviation (%) 100.00% Service Achieved N - N Velocity Code Velocity Code No Profile Selected Daily Profile
Remarks: Adaptive Exponential Smoothing
Exceptions: Demand High Demand Low Trending Up Trending Down Missed Service Infinity Check 4 Weekly New - Me

Export Library

- Exports the list displayed
- Select any available field to be exported even if not displayed as a column on the list
- Save to Export Library
- Save Filter Criteria
- Export Library list and actions

Export option available wherever a list displays

Export Library

- Exports the list displayed

Supplier List

Supplier ID: Ship Point: Location: [+ Add New Supplier](#)

List Filtered By: Location:016; Total # of Items: Greater Than 0; [Export](#) [View](#)

	Supplier ID	Supplier Name	Ship Point	Location	SCP Buyer	Order Cycle	Active Item
	011	Customer A Indiana	Default	016	Brian Crowell		25
	013	Customer A California	Default	016	Brian Crowell		2
	ATLSAF	Atlantic Safety Products, Inc	Default	016	Sven Anapu		16
	AURINN	Aurora Innovations	Default	016	Dawn Russell		50
	DIPNGR	Dip'N Grow Inc	Default	016	Sven Anapu		7
	FOXSOI	FoxFarm Soil & Fertilizer	Default	016	Dawn Russell		7
	JOYELE	Joyo Electric Appliance Mfg. Ltd	Default	016	Sven Anapu		12
	NDSMRI	NDS Drip Irrigation	Default	016	Sven Anapu		7
	OASGRO	OASIS Grower Solutions	Default	016	Tracy Coon		18
	ODOMAN	ODORCHEM MFG CORP	Default	016	Tracy Coon		12
	OGTCOM	OG Tea Company	Default	016	Tracy Coon		7
	OREONL	Oregon's Only Organics	Default	016	Tracy Coon		12

Page 1 of 200 Suppliers per page 1 - 128 of 128 Suppliers

128 Suppliers – result of filter

- Location 016
- Total # of Items: Greater Than 0

Export Library

- Select fields to be exported

The screenshot shows the BLUE RIDGE system interface. The main window displays a 'Supplier List' table with columns for Supplier ID and Supplier Name. The table is filtered by 'Location:016' and shows 200 suppliers per page. An 'Export' dialog box is open, allowing users to save the current view to an export library. The dialog box includes a 'Name' field (016 Suppliers), a 'Save to Export Library' checkbox (checked), a 'Save Filter Criteria' checkbox (unchecked), an 'Export Library' dropdown menu, and a list of 'Columns to Export' with checkboxes for Supplier ID, Supplier Name, Ship Point, Location, Host Buyer, SCP Buyer, Supplier Group Name, Setup Status, Order Cycle, and Total Lead Time. The 'Export' button is highlighted in the background.

Supplier ID	Supplier Name
011	Customer A Indiana
013	Customer A California
ATLSAF	Atlantic Safety Products, Inc
AURINN	Aurora Innovations
DIPNGR	Dip'N Grow Inc
FOXSOI	FoxFarm Soil & Fertilizer
JOYELE	Joyo Electric Appliance Mfg. Ltd
NDSMRI	NDS Drip Irrigation
OASGRO	OASIS Grower Solutions
ODOMAN	ODORCHEM MFG CORP
OGTCOM	OG Tea Company
OREONL	Oregon's Only Organics

Name – between 3 and 30 alpha/numeric characters only

Columns to Export – select desired boxes

Export Library

- Save to Export Library

The screenshot shows the 'Export' dialog box in the Blue Ridge software. The dialog box has the following fields and options:

- Name: 016 Suppliers
- Save to Export Library:
- Save Filter Criteria:
- Export Library:
- Columns to Export:
 - Supplier ID
 - Supplier Name
 - Ship Point
 - Location
 - Host Buyer
 - SCP Buyer
 - Supplier Group Name
 - Setup Status
 - Order Cycle
 - Total Lead Time

The background interface shows a 'Supplier List' table with the following data:

Supplier ID	Supplier Name	Order Cycle
011	Customer A Indiana	25
013	Customer A California	2
ATLSAF	Atlantic Safety Products, Inc	16
AURINN	Aurora Innovations	50
DIPNGR	Dip'N Grow Inc	7
FOXSOI	FoxFarm Soil & Fertilizer	7
JOYELE	Joyo Electric Appliance Mfg. Ltd	12
NDSMRI	NDS Drip Irrigation	7
OASGRO	OASIS Grower Solutions	18
ODOMAN	ODORCHEM MFG CORP	12
OGTCOM	OG Tea Company	7
OREONL	Oregon's Only Organics	12

Select this option if this will be a common reoccurring export

Export Library

- Save to Export Library

Export ✕

Name:

Save to Export Library:

Save Filter Criteria:

Export Library ▼

- Export Library**
- DOWTOE Order List**
- 016 Suppliers**

Ship Point

Location

Host Buyer

SCP Buyer

Supplier Group Name

Setup Status

Order Cycle

Total Lead Time

Export **Cancel**



Select the Export Library dropdown and select saved Export

Export Library

- Save Filter Criteria

Export [X]

Name:

Save to Export Library:

Save Filter Criteria:

▼

Columns to Export:

- Supplier ID
- Supplier Name
- Ship Point
- Location
- Host Buyer
- SCP Buyer
- Supplier Group Name
- Setup Status
- Order Cycle
- Total Lead Time

Export **Cancel**



Save Filter Criteria populates all selected columns to export for this saved export

Export Library

Advanced Tasks, Export Library










implementation | Training2 | 3/17/2019 - [Lo

BLUE RIDGE

Dashboard Daily Tasks **Advanced Tasks** Administrative Reports Help

Advanced Seasonality Aggregate Forecast Custom Groups Custom Views Event Planning Event Items **Export Library** Forward Buying Kitting Mass Maintenance Profiles Projections Push Allo Export Li

> Export Library
No Filters Selected

	Name ▲	Created By	Creation Date	List Type	Column Selections	Filter Criteria
  	016 Suppliers	Blue Ridge	3/17/2019	Supplier List	Supplier ID,Supplier Name,Ship Point,Location,SCP Buyer,Order Cycle,	List Filtered By:Location:016;Total # of Items:Greater Than 0;
  	A Items Region North	Dario Aguero	2/24/2019	Item List	Item ID,Supplier ID,Ship Point,Location,Buying Multiple (Units),Forecast Weekly,Remarks,Service Level Goals,Units Per Pallet,Velocity Code,	List Filtered By:Velocity Code:A Velocity Code ;Activity Code:A - Active;Custom Group:Region:North;
  	DOWTOE Order List	Blue Ridge	2/24/2019	Supplier List	Supplier ID,Supplier Name,Ship Point,Location,Host Buyer,Order Cycle,Last OCO Date,	List Filtered By:Supplier ID:DOWTOE: DOWN TO EARTH DISTRIBUTORS, INC;

Actions

- Run
- Copy
- Delete

Download File

The file you have exported is ready to download. Would you like to download it?

Export Library

Advanced Tasks, Export Library

The screenshot displays the 'Export Library' interface. At the top left, there is a header 'Export Library' and a filter status indicator 'No Filters Selected'. Below this is a table with columns: Name, Created By, Creation Date, and List Type. The table contains five rows of data. An 'Export Library Filters' dialog box is open over the table, featuring input fields for Name, Created By, and Creation Date, and a dropdown menu for List Type. The List Type dropdown is currently set to 'All' and is expanded to show a list of options: All, Item List, Order List, Supplier List, Supplier Group List, Profile List, User List, Event List, Deal List, and Kit List. An 'Apply Filters' button is located at the bottom of the dialog box. A blue arrow points from the 'No Filters Selected' indicator to the 'Apply Filters' button.

Name	Created By	Creation Date	List Type
016 Suppliers	Blue Ridge	3/17/2019	Supplier List
A Items Region North	Dario Aguero	2/24/2019	Item List
DOWTOE Order List	Blue Ridge	2/24/2019	Supplier List
HighVItems	Blue Ridge	2/24/2019	
InterfacedFields	Blue Ridge	3/9/2019	

Export Library Filters

Name:

Created By:

Creation Date:

List Type: **All**

- All
- Item List
- Order List
- Supplier List
- Supplier Group List
- Profile List
- User List
- Event List
- Deal List
- Kit List

Apply Filters

Option to filter to screen specific Lists

Warehouse Multiple

Building the SOQ by the Buying Multiple of 5 (layer), when would you round to the pallet of 60?

Units Per Case

Units Per Layer

Units Per Pallet

Units	Cal Days	Sell Days	
45.0	76.0	54.0	SOQ
0.0	0.0	0.0	Maximum Qty (0.0)
0.0	0.0	0.0	Precision
0.0	0.0	0.0	Warehouse Multiple (0.0)
3.0	5.6	3.6	Buying Multiple (5.0)
0.0	0.0	0.0	Minimum Qty (0.0)
0.0	0.0	0.0	Days Adjusted (0)
0.0	0.0	0.0	Special Orders
0.0	0.0	0.0	Event (0.0)
0.0	0.0	0.0	Fwd Buy (0.0)
42.0	70.4	50.4	Need
35.0	58.1	42.1	Balance
25.0	41.9	29.9	On Hand
10.0	16.1	12.1	On Order
0.0	0.0	0.0	Backorder
0.0	0.0	0.0	Reserved
0.0	0.0	0.0	Held Qty (0.0)
77.0	129.9	91.9	Order Up To Level
0.0	0.0	0.0	Shelf Life (0.0)
4.1	7.0	5.0	Effective Order Cycle (0.0)
76.5	129.9	91.9	Order Trigger Point
4.1	7.0	5.0	Supplier Order Cycle
72.4	122.9	86.9	Low Stock Point
53.5	90.0	64.0	Lead Time
18.9	32.9	22.9	Safety Stock



Warehouse Multiple

Item Manager

Forecasting Parameters		Weights and Measures		
Standard	Forecast Type	0	Pack Size (Units)	
0	Months to use for special forecast type	30.996	Unit Weight (Gross)	
<input type="checkbox"/>	Exclude from Auto Select	0	Unit Weight (Net)	
	Supplier	<input type="checkbox"/>	Use Catch Weight	
	Value From	1	Unit Cube	
Order Restrictions		1	Units Per Case	
0	Minimum Order (Units)	15	Units Per Layer	
15	Buying Multiple (Units)	60	Units Per Pallet	
0	Maximum Order (Units)	0	Cube Adjusted Weight	
0	OUTL Max	Units	0	Units Per Dozen
0	Intelligent Maximum		1	Units Per Other
0	Intelligent Minimum		1	Units Per Other Description
<input type="checkbox"/>	Enable Intelligent Minimum/Maximum	Supplier	Value From	
<input checked="" type="checkbox"/>	Calculate Intelligent Minimum/Maximum	Supplier	Value From	
0	Shelf Life (Days)			
60	Warehouse Multiple			
75	Warehouse Multiple Round %			

- Round the SOQ to a larger pack size
- % of the warehouse multiple required before the SOQ is rounded up, can vary by item

Warehouse Multiple

Buying Multiple 5

75% of 60 is 45...rounding to the pallet

Units	Cal Days	Sell Days	
60.0	102.2	72.2	SOQ
0.0	0.0	0.0	Maximum Qty (0.0)
0.0	0.0	0.0	Precision
15.0	26.2	18.2	Warehouse Multiple (60.0)
3.0	5.6	3.6	Buying Multiple (5.0)
0.0	0.0	0.0	Minimum Qty (0.0)
0.0	0.0	0.0	Days Adjusted (0)
0.0	0.0	0.0	Special Orders
0.0	0.0	0.0	Event (0.0)
0.0	0.0	0.0	Fwd Buy (0.0)
42.0	70.4	50.4	Need
35.0	58.1	42.1	Balance
25.0	41.9	29.9	On Hand
10.0	16.1	12.1	On Order
0.0	0.0	0.0	Backorder
0.0	0.0	0.0	Reserved
0.0	0.0	0.0	Held Qty (0.0)
77.0	129.9	91.9	Order Up To Level
0.0	0.0	0.0	Shelf Life (0.0)
4.1	7.0	5.0	Effective Order Cycle (0.0)
76.5	129.9	91.9	Order Trigger Point
4.1	7.0	5.0	Supplier Order Cycle
72.4	122.9	86.9	Low Stock Point
53.5	90.0	64.0	Lead Time
18.9	32.9	22.9	Safety Stock

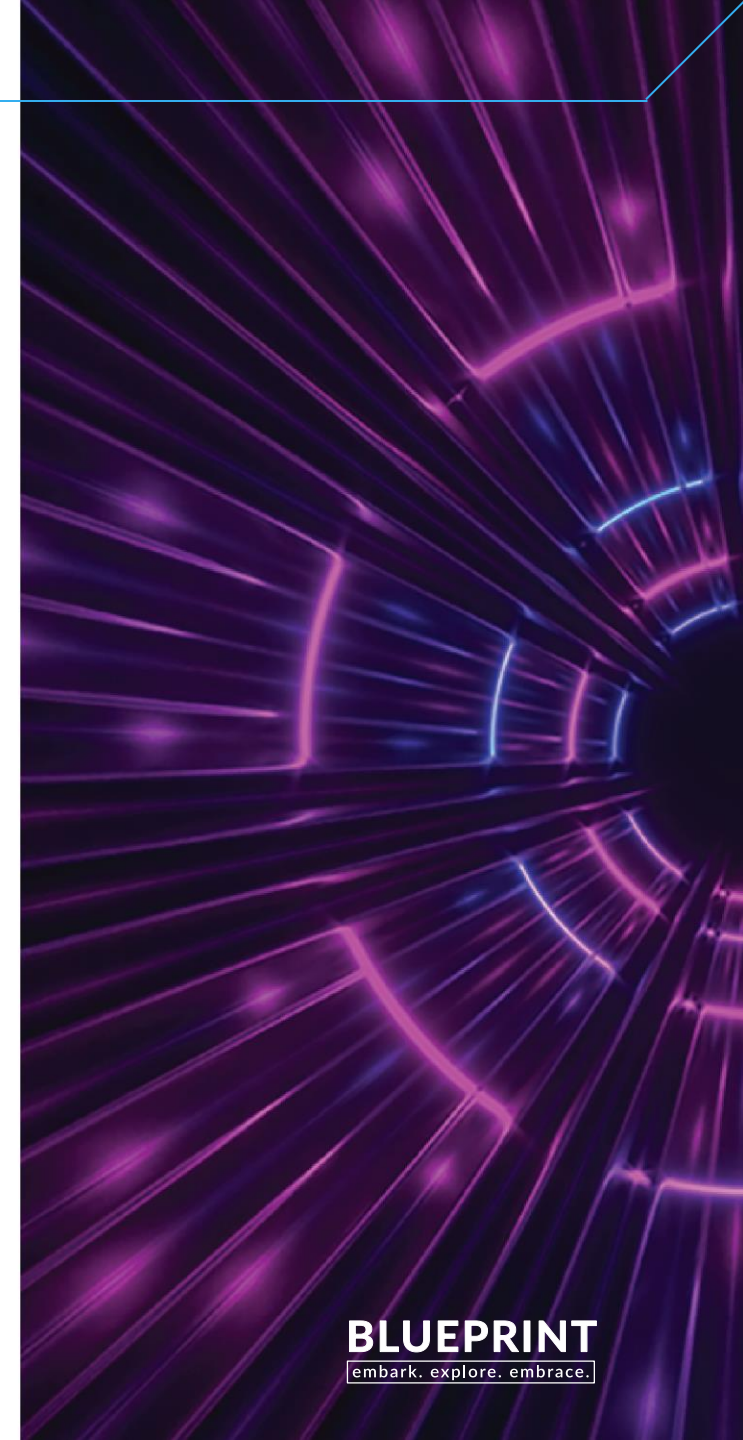
Works with Days Added

Units	Cal Days	Sell Days	
60.0	100.2	72.2	SOQ
0.0	0.0	0.0	Maximum Qty (0.0)
0.0	0.0	0.0	Precision
10.0	18.1	12.1	Warehouse Multiple (60.0)
3.9	6.7	4.7	Buying Multiple (5.0)
0.0	0.0	0.0	Minimum Qty (0.0)
4.1	5.0	5.0	Days Added (7)
0.0	0.0	0.0	Special Orders
0.0	0.0	0.0	Event (0.0)
0.0	0.0	0.0	Fwd Buy (0.0)
42.0	70.4	50.4	Need
35.0	58.1	42.1	Balance
25.0	41.9	29.9	On Hand
10.0	16.1	12.1	On Order
0.0	0.0	0.0	Backorder
0.0	0.0	0.0	Reserved
0.0	0.0	0.0	Held Qty (0.0)
77.0	129.9	91.9	Order Up To Level
0.0	0.0	0.0	Shelf Life (0.0)
4.1	7.0	5.0	Effective Order Cycle (0.0)
76.5	129.9	91.9	Order Trigger Point
4.1	7.0	5.0	Supplier Order Cycle
72.4	122.9	86.9	Low Stock Point
53.5	90.0	64.0	Lead Time
18.9	32.9	22.9	Safety Stock

SCA Shareability

Sharing reports...

The image displays three overlapping screenshots of the SCA interface, illustrating the sharing options available for reports. Each screenshot shows a toolbar with an 'Edit Design' button, a plus sign, and a 'Share' button. The first screenshot shows the 'Share' dropdown menu with options: 'Share this View', 'Make this View Public' (highlighted with a blue box), 'Edit Shared Details', 'Email', 'Embed', 'URL/Permalink', 'Slideshow', and 'Share to Support'. The second screenshot shows the 'Export this View' dropdown menu with options: 'As CSV', 'As Excel', 'As PDF', 'As HTML', 'As Zoho Sheet', 'As Template', and 'To other Workspaces'. The third screenshot shows the 'Share' dropdown menu with options: 'Share this View', 'Make this View Public' (highlighted with a blue box), 'Edit Shared Details', 'Email' (highlighted with a blue box), 'Embed', 'URL/Permalink', 'Slideshow', and 'Share to Support'. The 'Email' option in the third screenshot is also highlighted with a blue box.



SCA Shareability

The screenshot shows the 'Share' menu in the SCA interface. The menu is open, displaying various options. The 'Email' option is highlighted in blue. The menu items are:

- Edit Design
- +
- Share
- Share this View
- Make this View Public
- Edit Shared Details
- Email**
- Embed
- URL/Permalink
- Slideshow
- Share to Support

Below the 'Share' menu, there are additional options for email:

- Email this View
- As CSV
- As Excel
- As PDF
- As HTML
- Email Multiple Views
- As PDF
- As Image (ZIP)
- As CSV (ZIP)
- As HTML (ZIP)
- Edit Email Schedules

Email

- One-time
- Schedules
- Multiple recipients

Edit Email Schedule

Schedule Count: 3

<input type="checkbox"/>	Schedule Name	Views	Schedule Period	Created By	Status	Schedules Consumed
<input type="checkbox"/>	Schedule-Altria Dashboard	1 View	Daily At 11:05 EST	analytics@brinv.com	Running	1
<input type="checkbox"/>	Schedule-ProjectedOutOfStock	1 View	Daily At 10:30 EST	analytics@brinv.com	Running	1
<input type="checkbox"/>	Schedule-Item Count Alert	1 View	Daily At 11:05 EST	analytics@brinv.com	Running	1

SCA Shareability

Look but can/can't touch

The screenshot displays a software interface for sharing a view. At the top, there is a header "Embed / Publish URL" with a help icon and a close icon. Below this, there are two tabs: "Link" (selected) and "Embed".

The "Link" tab shows an "Access Permission" dropdown menu set to "Access with Login". A modal dialog is open, showing three options:

- Access with Login**: When anyone access this URL, it will prompt for login details. Please make sure this view is shared to the user who is about to login and access.
- Access without Login**: When anyone access this URL, it will not prompt for login details even though this view is private. (This option is highlighted with a blue box.)
- Access within Organization / External Users**: Anyone who has the link can access.

Below the modal, there are "OK" and "Cancel" buttons. To the right of the modal, there is a "Copy" button.

Underneath the modal, there is a section titled "Options" with a "Include:" label. It has two checked checkboxes: "Title" and "Description".

At the bottom, there is a section titled "Apply Permissions & Filters" with two tabs: "Permissions" (selected) and "Filter Criteria". Below the tabs, there is a text prompt: "Select the permissions to be granted for this view". There are three checkboxes:

- Read Options
- Read Access
- Export Data
- View Underlying Data

The "Read Access" checkbox is highlighted with a blue box.

SCA Shareability

User Filters – check the Toolbar

Embed / Publish URL ? ×

Link Embed Published as: 🔗 | [Edit](#)

Access Permission: 🔗 Access without Login ▾ [Edit Permissions](#)

URL for accessing this view(/table) independently: [Regenerate](#) 🔗

`https://analytics.zoho.com/open-view/181887056797665870/fe6af5cb804a8244b7a3b026f0f25566` Copy

Works with Days Added

Options

Include:	<input checked="" type="checkbox"/> Title	<input checked="" type="checkbox"/> Toolbar
	<input checked="" type="checkbox"/> Description	
	<input type="checkbox"/> Social Widget ?	
Settings:	<input type="checkbox"/> Auto Refresh every <input type="text" value="120"/> secs ?	



SCA Shareability

<https://analytics.zoho.com/open-view/181887056736794511/7f5d7dc34e290be036d4bf8157bbaef4>

Buyer On Hand On Order \$

The screenshot shows a Zoho Analytics dashboard for a report titled "Buyer OH OO \$". The dashboard includes three filter dropdowns: "LocationName:" (--- Select ---), "Buyer:" (--- Select ---), and "IsNewItem?:" (--- Select ---). Below the filters is a table with the following data:

	Buyer	Total StockOnHandDollars	Total StockOnOrderDollars
1	Blue Ridge	\$12,509,685.40	\$5,219,592.03

To the right of the table, a context menu is open, showing options: "Zoho Sheet View", "Export as CSV", "Export as Excel", "Export as PDF", "Export as HTML", "As Zoho Sheet", and "As Template".



BLUEPRINT

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