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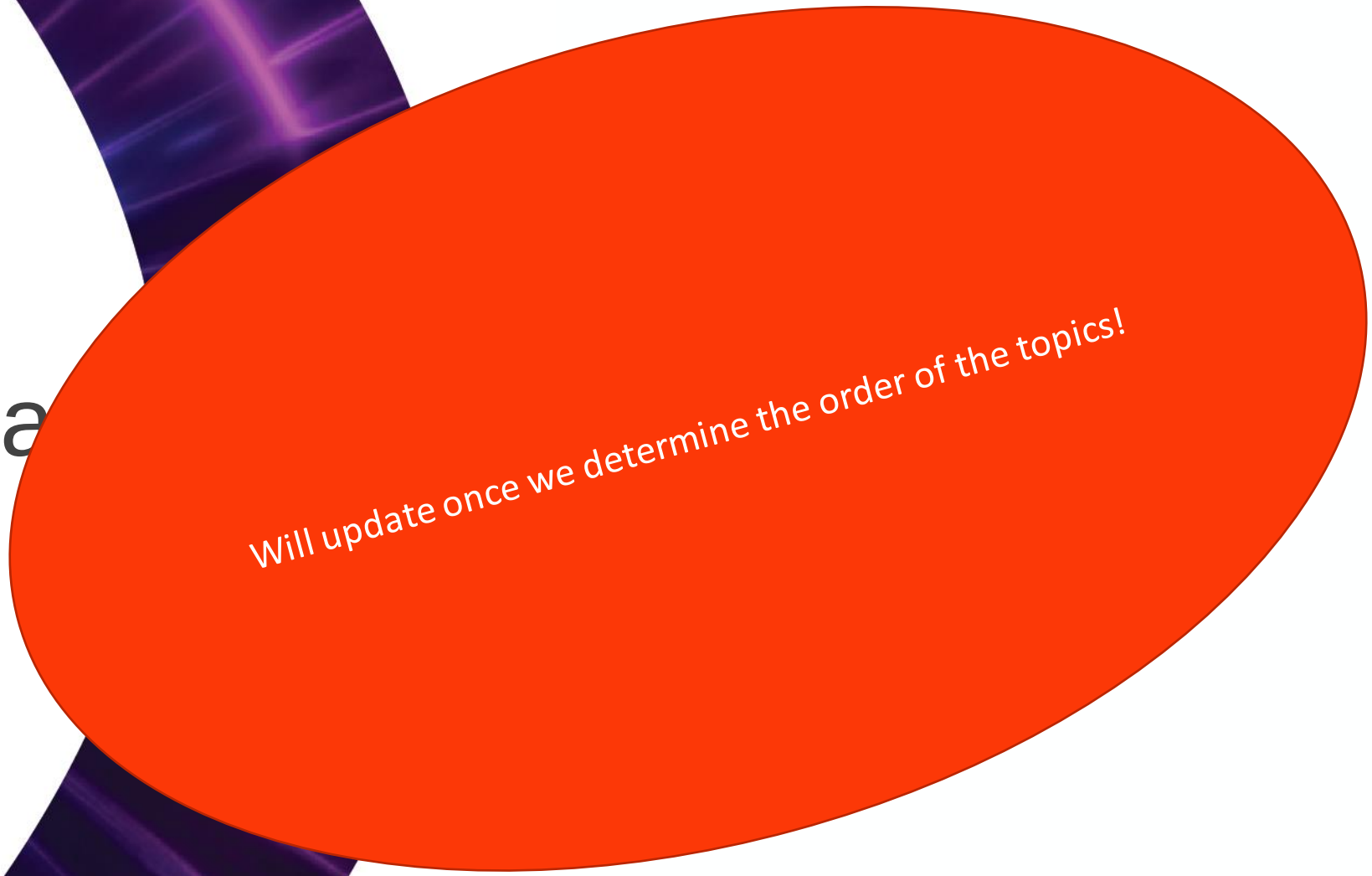
Hidden Gems in SCP

1. “I Didn’t Know I Could Do That!”

Agenda



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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
						California							
GC704	Green Cleaner 4 oz	012	A - Active	A	011	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	OAULTR	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

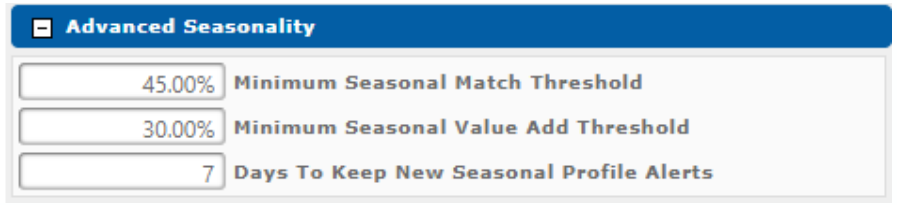
1 1-25 of 25 Item

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



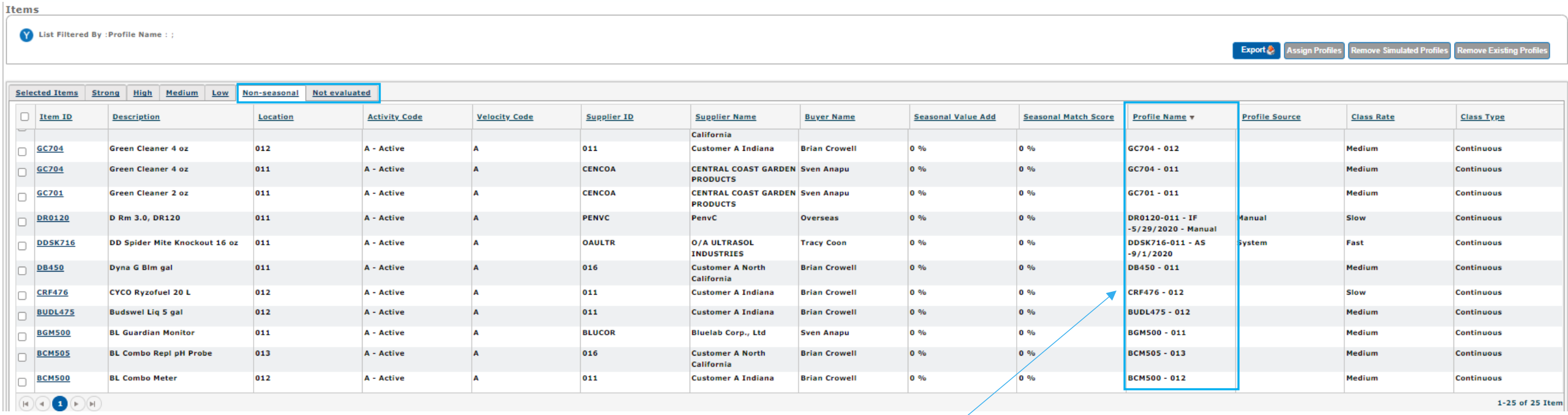
Seasonal Value Add ▼	Seasonal Match Score
0 %	37 %
0 %	0 %
0 %	18 %
0 %	0 %
0 %	0 %
0 %	15 %
0 %	0 %
0 %	11 %
0 %	24 %
0 %	0 %
0 %	6 %
0 %	0 %

Defaults from Global, can be overridden on AS job

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



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
						California							
GC704	Green Cleaner 4 oz	012	A - Active	A	011	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	OAULTR	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

Often overlooked categories with critical information you need to know

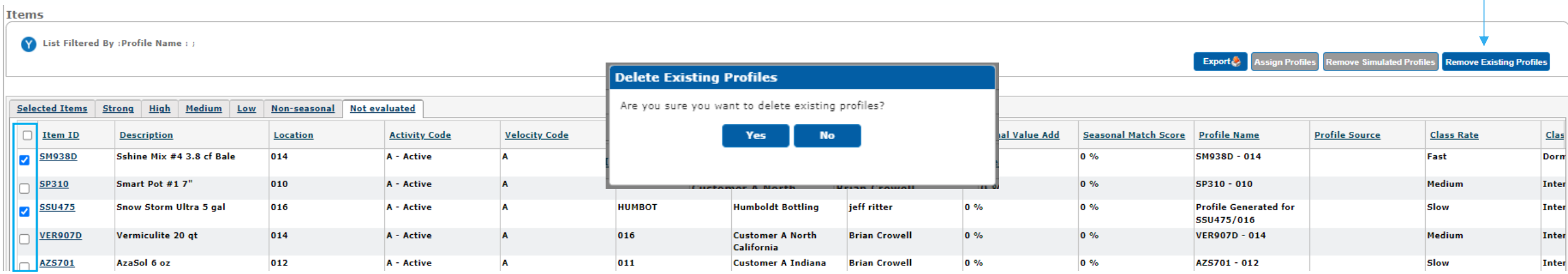
Should these profiles be removed?

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

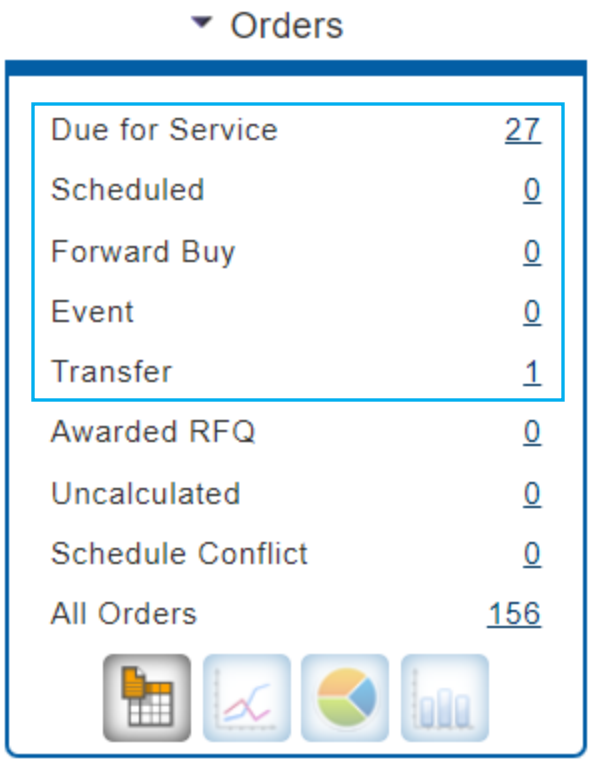


Item ID	Description	Location	Activity Code	Velocity Code					Seasonal Match Score	Profile Name	Profile Source	Class Rate	Clas
SM938D	Sshine Mix #4 3.8 cf Bale	014	A - Active	A					0 %	SM938D - 014		Fast	Dorm
SP310	Smart Pot #1 7"	010	A - Active	A					0 %	SP310 - 010		Medium	Inter
SSU475	Snow Storm Ultra 5 gal	016	A - Active	A	HUMBOT	Humboldt Bottling	jeff ritter	0 %	0 %	Profile Generated for SSU475/016		Slow	Inter
VER907D	Vermiculite 20 qt	014	A - Active	A	016	Customer A North California	Brian Crowell	0 %	0 %	VER907D - 014		Medium	Inter
AZS701	AzaSol 6 oz	012	A - Active	A	011	Customer A Indiana	Brian Crowell	0 %	0 %	AZS701 - 012		Slow	Inter

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?



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?

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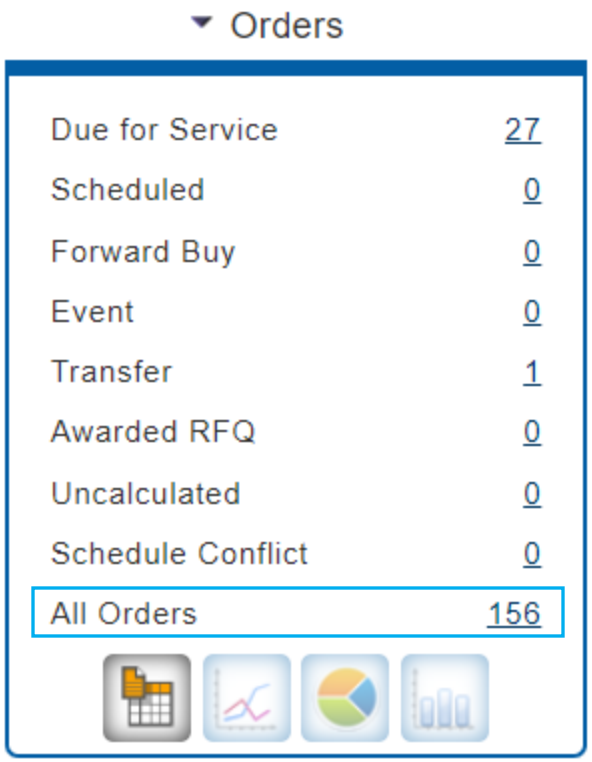
Vacation Ordering

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



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.

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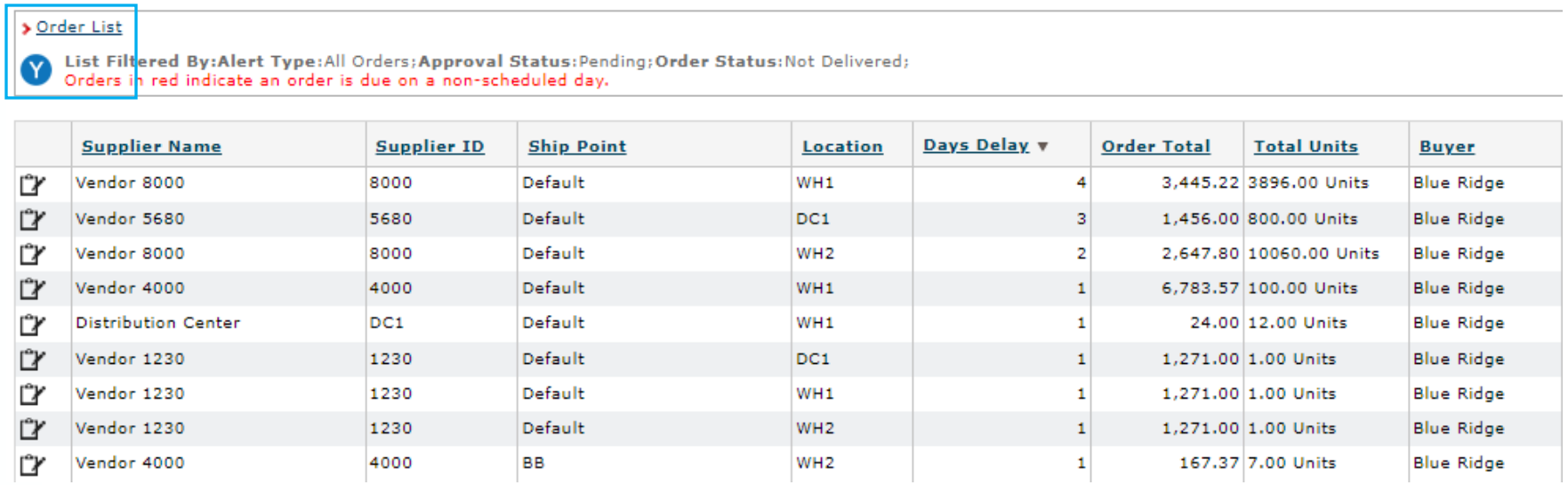
Vacation Ordering

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)

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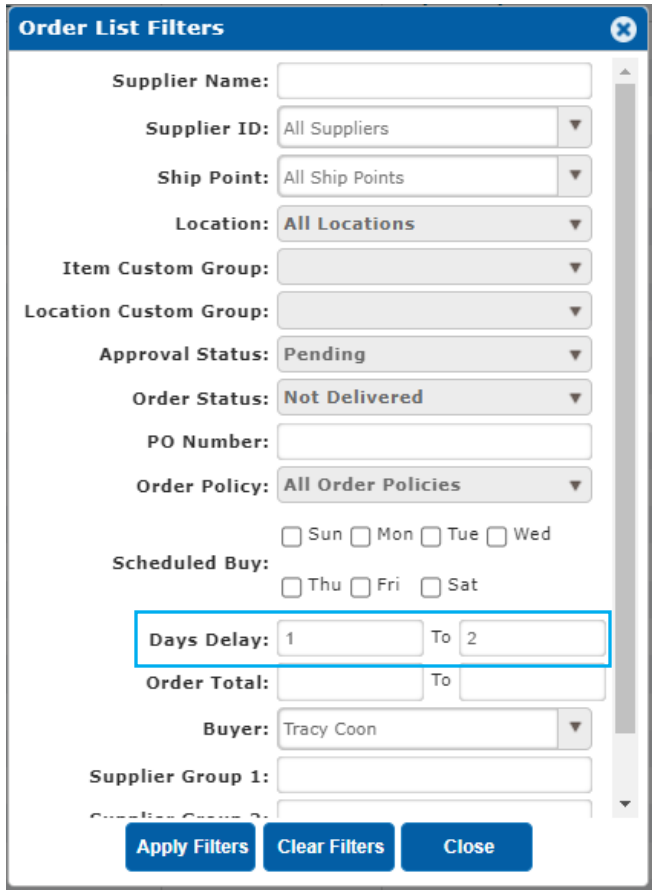
Vacation Ordering

Days Delay Range



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

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Vacation Ordering

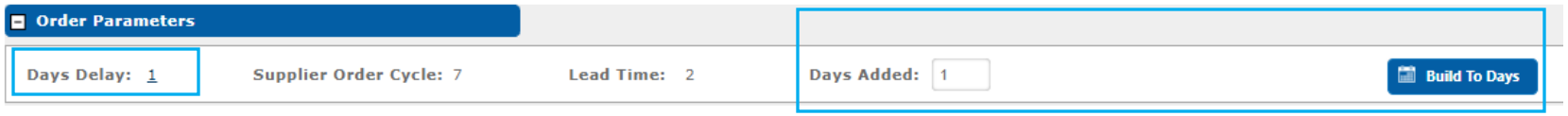
Days Delay Range

Order List

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

- 

- Expected Delivery Date push (optional)

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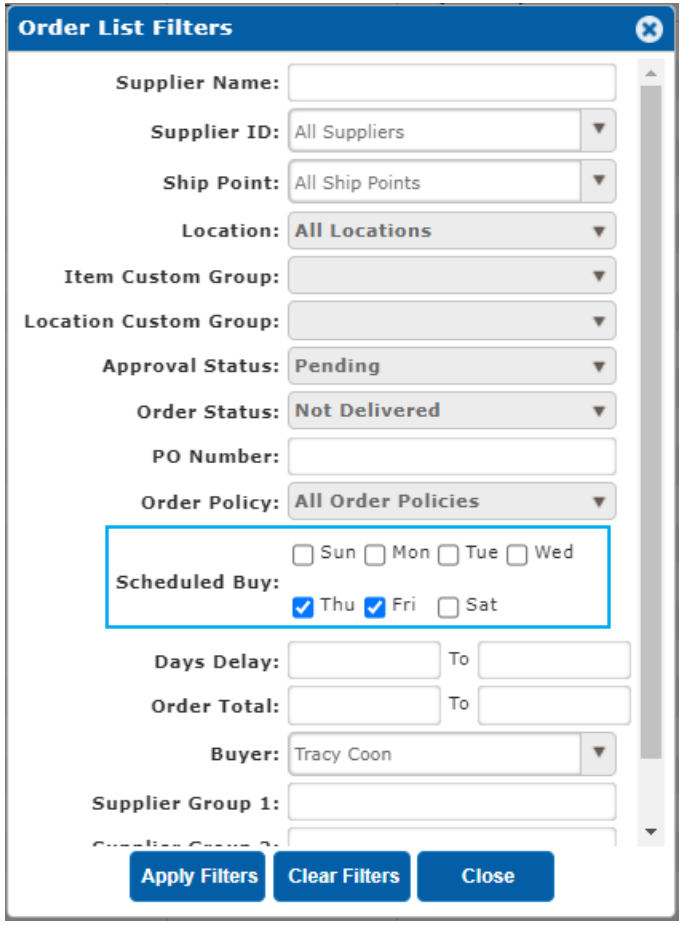
Vacation Ordering

Schedule Buy (days)



Scheduled Buy...

	Supplier Name	Supplier ID	Ship Point	Location		
	Vendor 1100	1100	Default	WH2		
	Vendor 3000	3000	Default	WH2		
	Vendor 4000	4000	Default	WH2		
	Vendor 6000	6000	Default	WH2		
	Vendor 8000	8000	Default	WH2		
	Distribution Center	DC1	Default	WH1		
	Distribution Center	DC1	Default	WH2		
					2	Weekly
					4	Weekly
					4	Weekly
					4	Weekly

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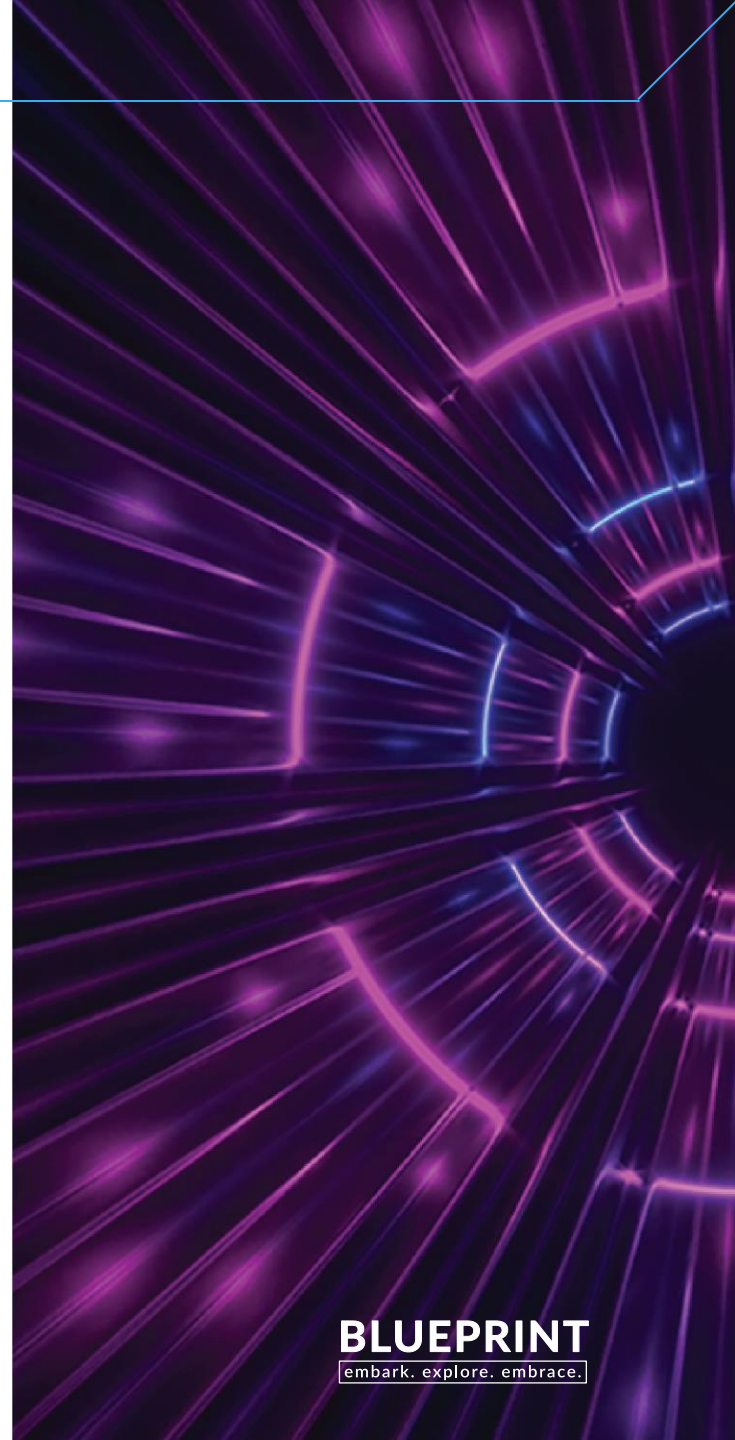
Vacation Ordering

Scheduled Buy (days)

	Supplier Name	Supplier ID	Ship Point	Location	Days Delay	Order Policy
	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



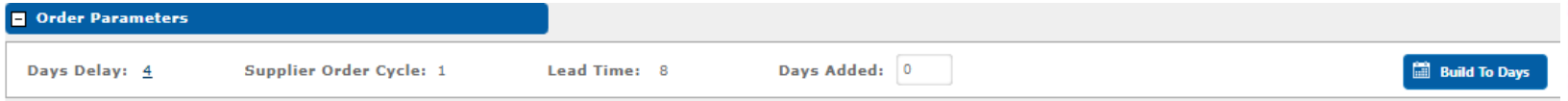
Vacation Ordering

Scheduled Buy Days

	Supplier Name	Supplier ID	Ship Point	Location	Days Delay	Order Policy
	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



- Expected Delivery Date push (optional)

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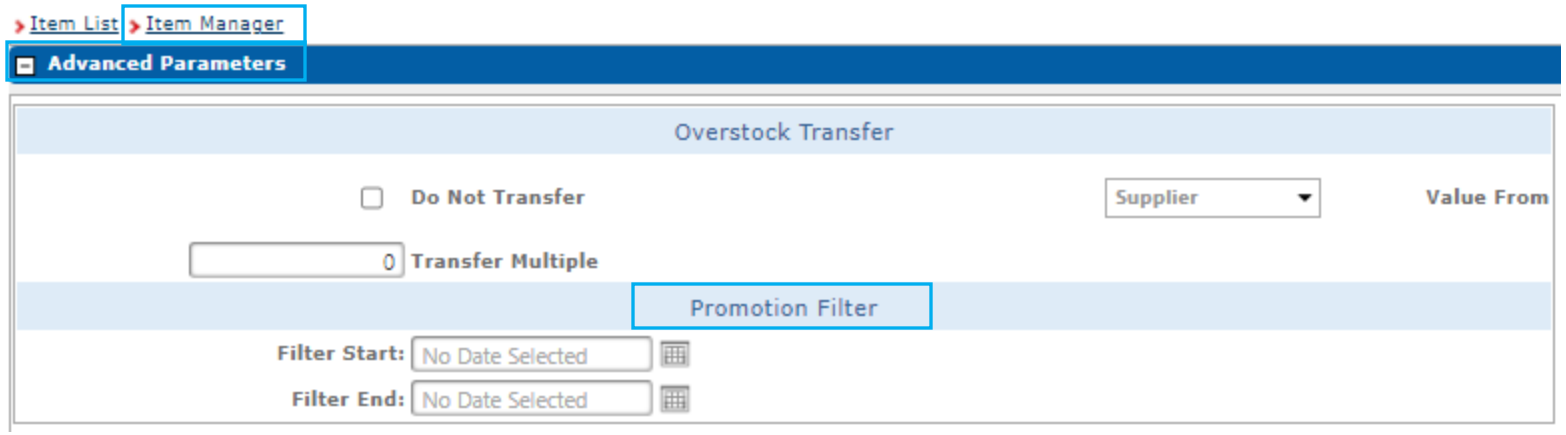
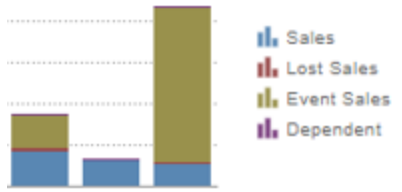
Promotional Filter



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



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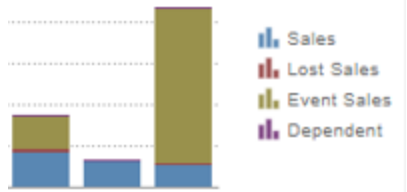
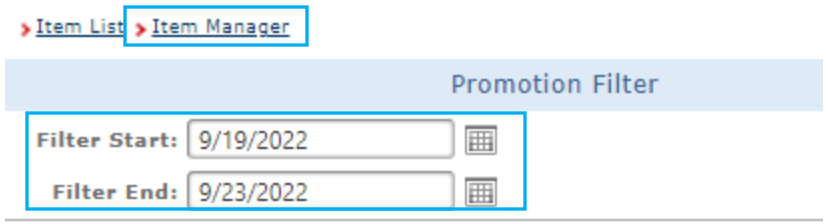
Promotional Filter

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





Filter Start date today's date or a future date
Filter End date today's date or a future date

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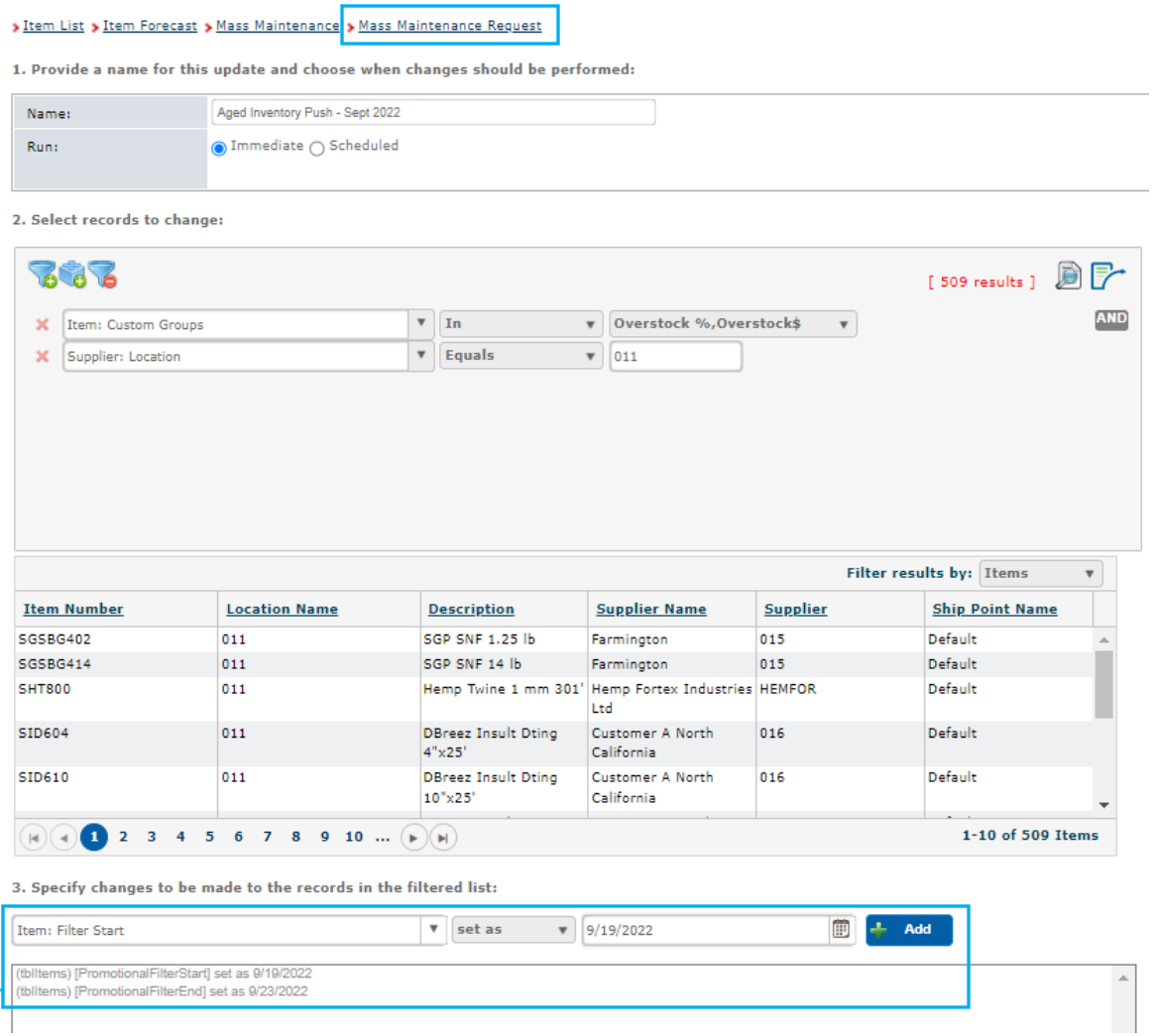
Promotional Filter

Mass Maintenance and Upload Requests to Service Desk



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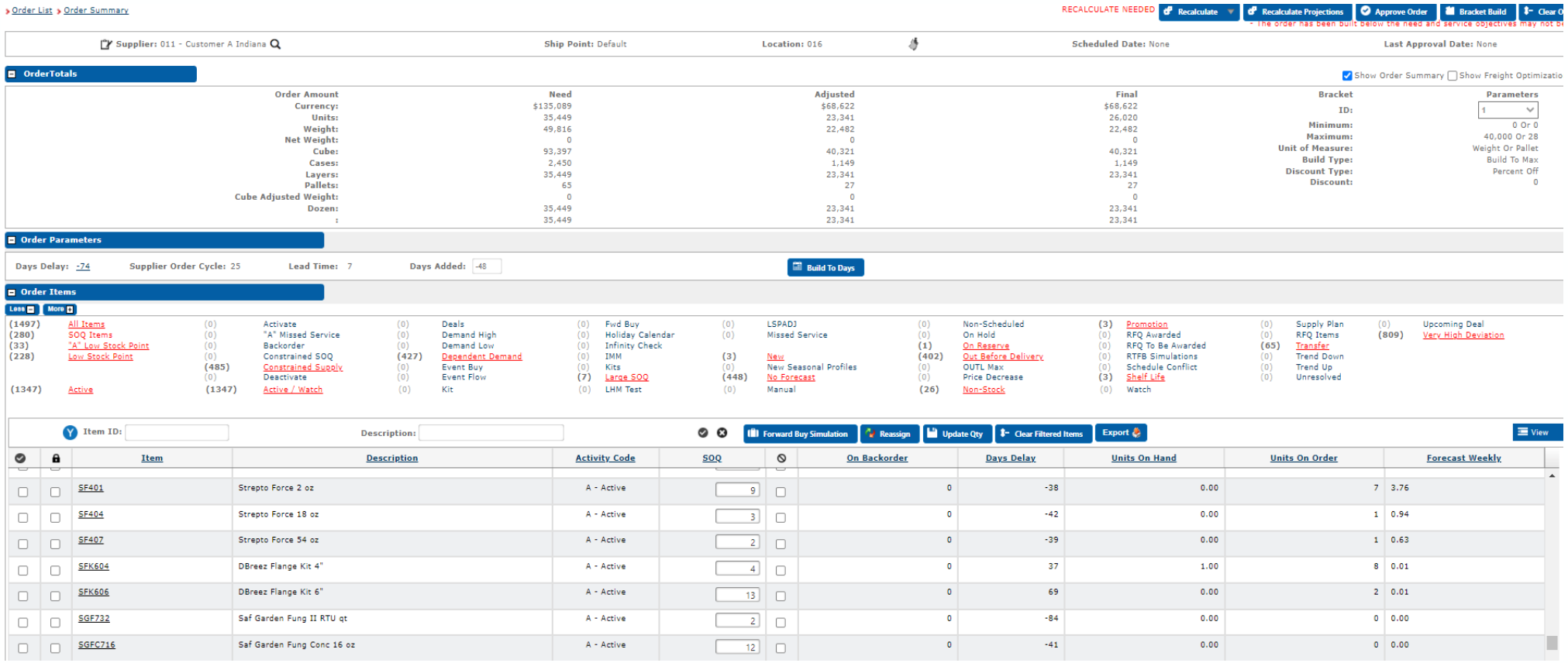
Item Filter on an Order

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



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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			(1)	On Reserve	(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				

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 fltr	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

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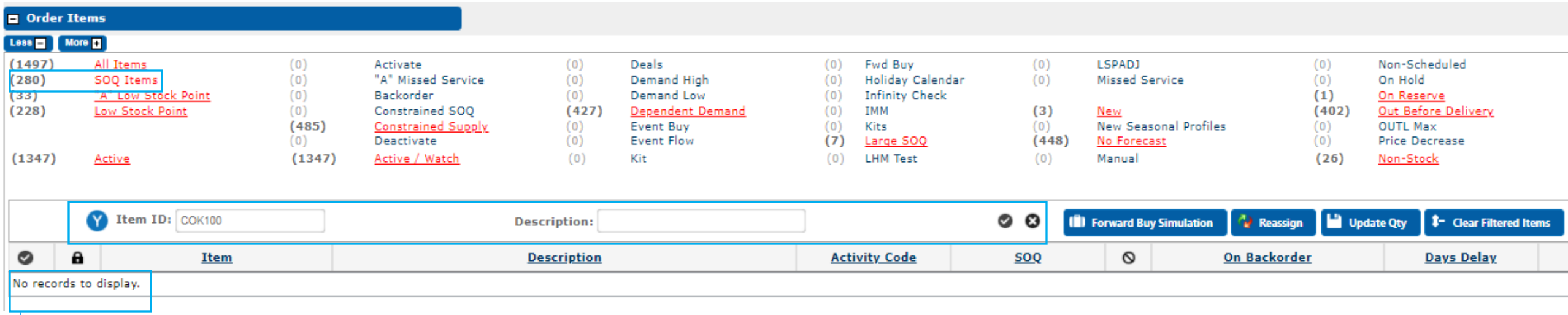
Item Filter on an Order

Filtering for item COK100

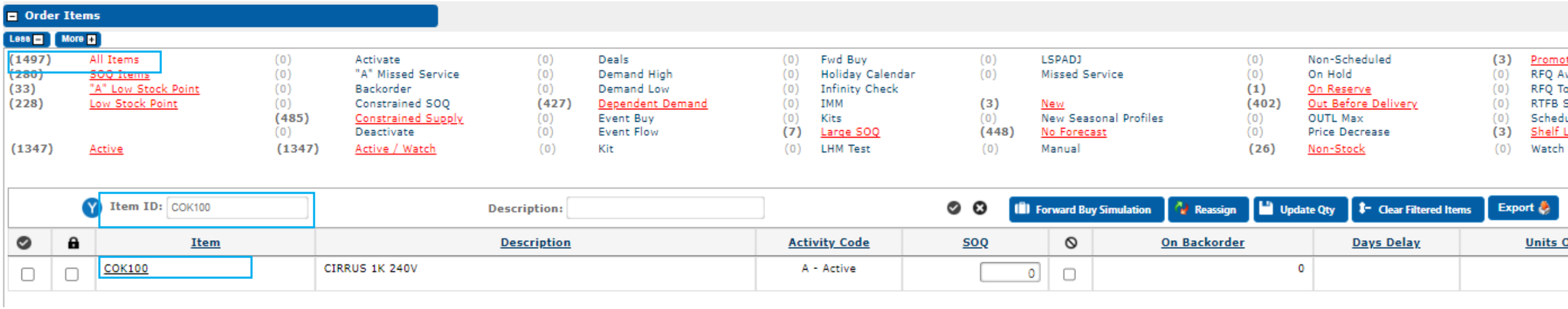


Enter the item in the Item ID filter or use the Description filter and select the filter icor ✔

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

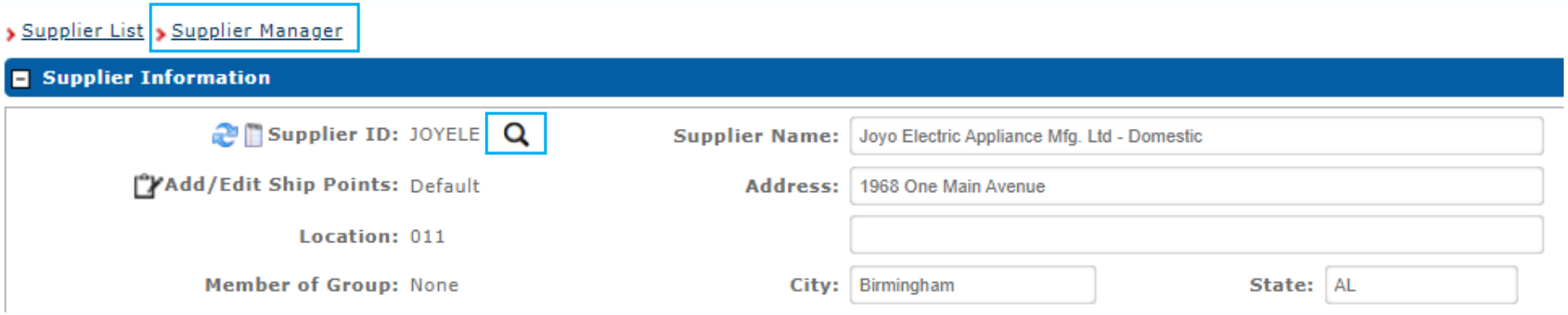


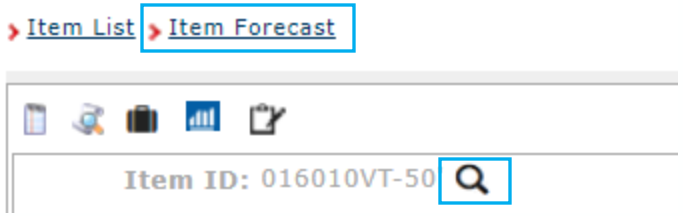
Item result returns immediately verses selecting All Item or Active and then filtering the item again

Apply Filter ✔ ✖ Clear Filter

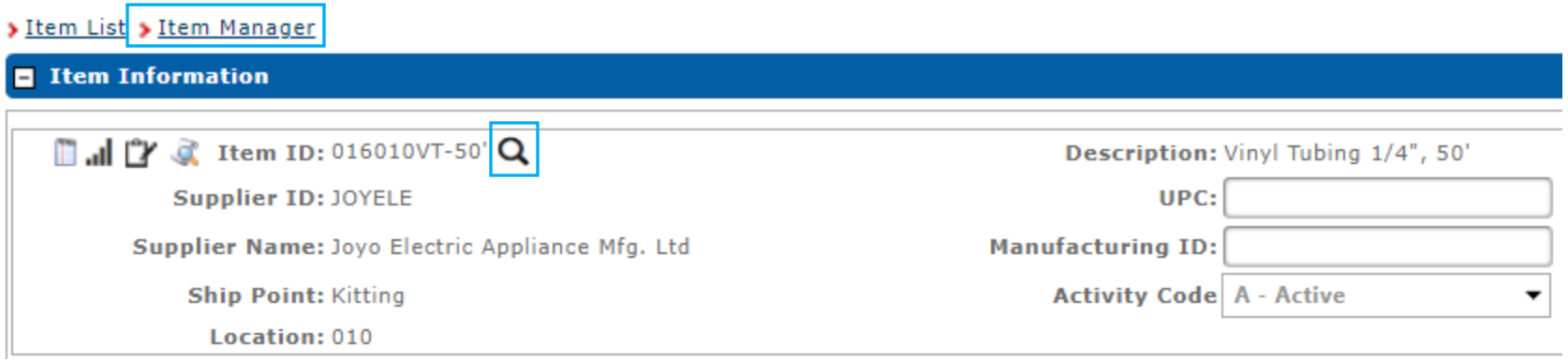
Supplier and Item Lookup

Quick search option on Supplier Manager and Item screens





Simple access to a different supplier or item



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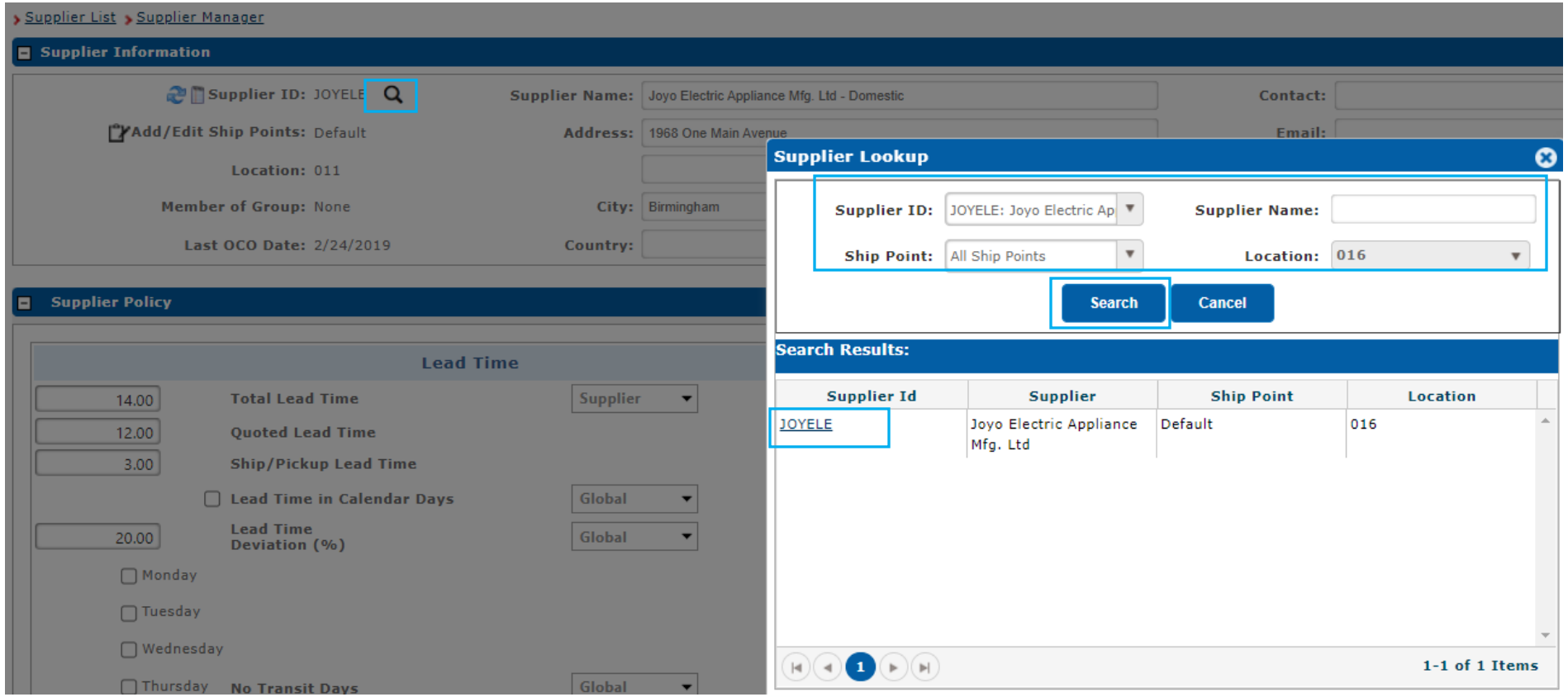
Supplier Lookup

Supplier JOYELE, Ship Point Default, Location 011

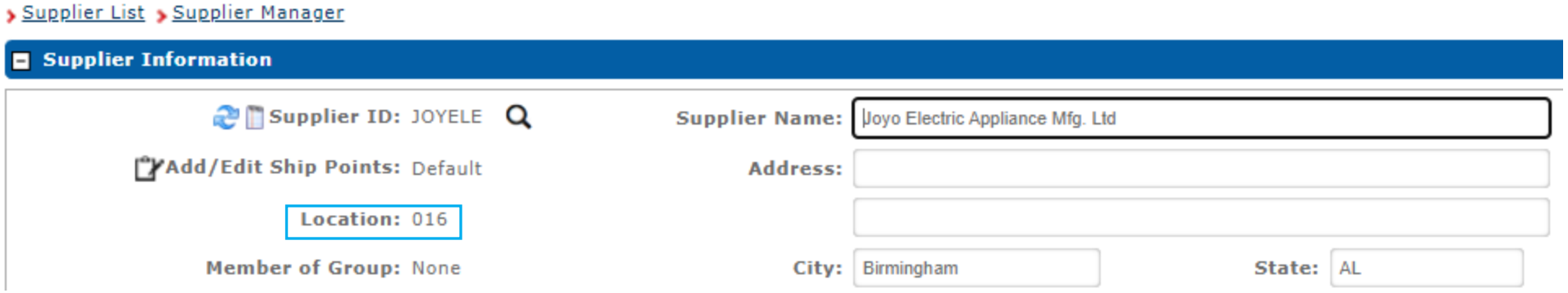


Search by one or more of these options

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

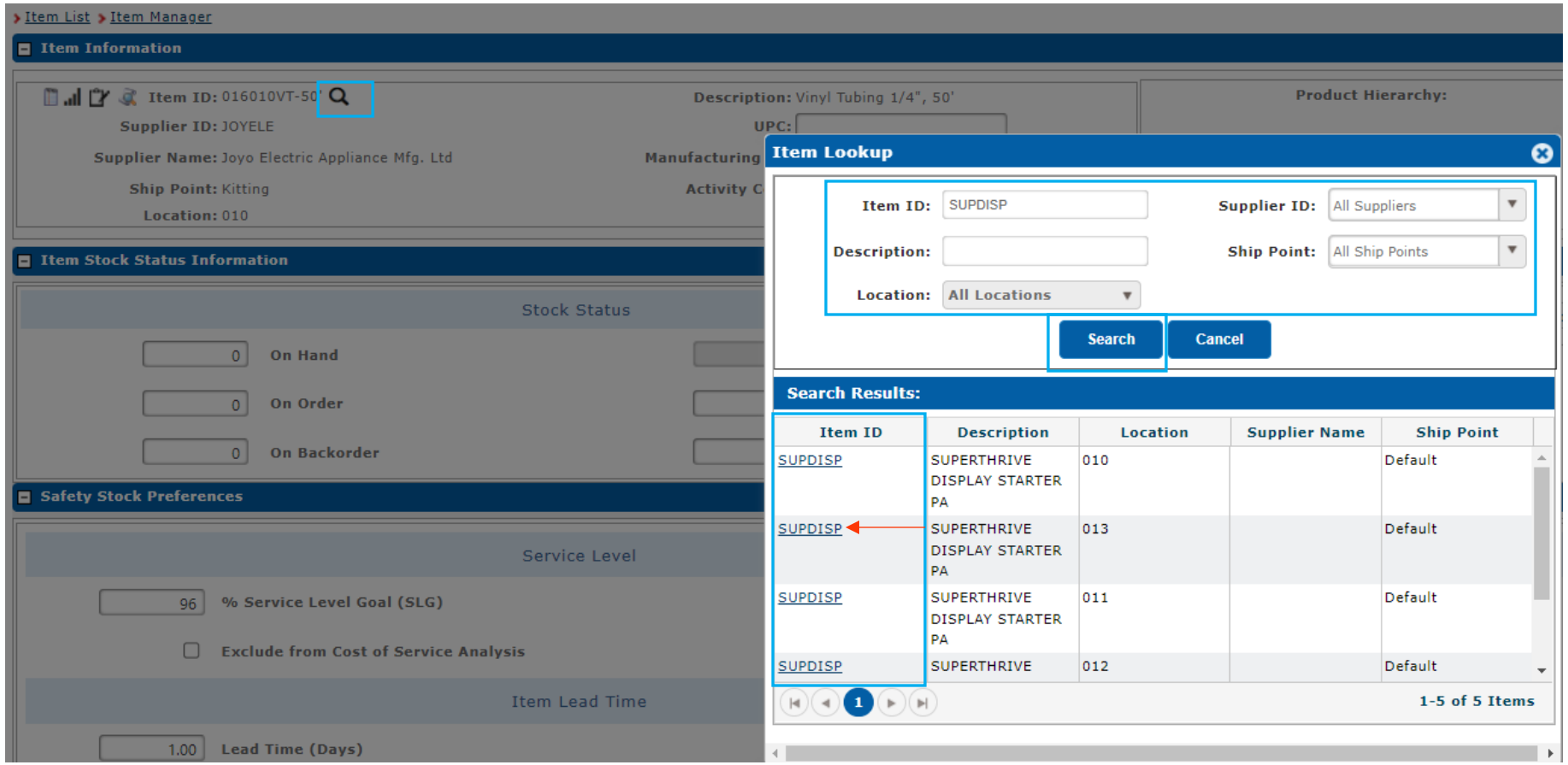
Supplier Lookup

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



Item Lookup

Supplier JOYELE, Ship Point Default, Location 011



Search by one or more of these options

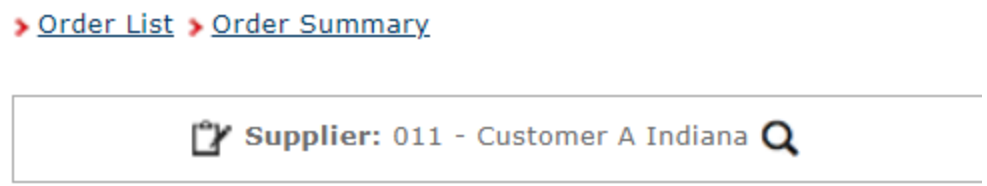
Select the Item ID link to go to this item screen

Item Lookup

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

Order Lookup

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



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

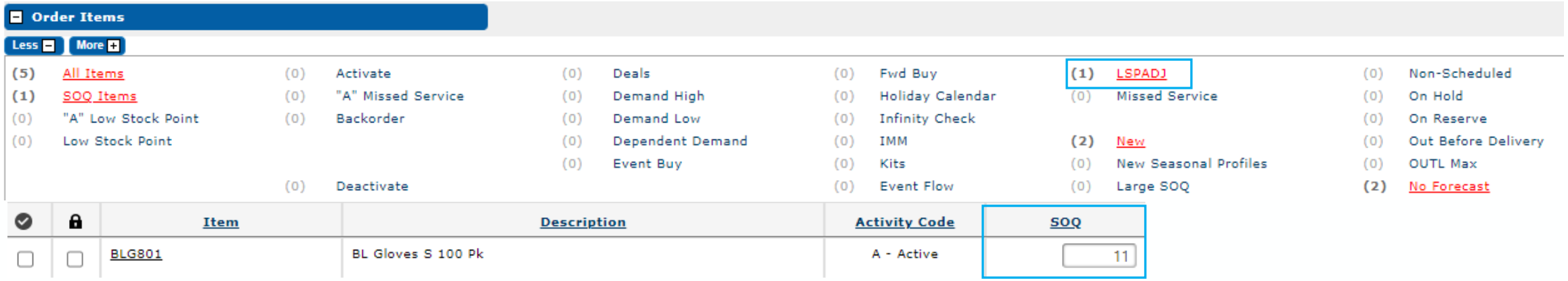
Balance reaches the OTP and LSP earlier with LSPADJ

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

LSPADJ

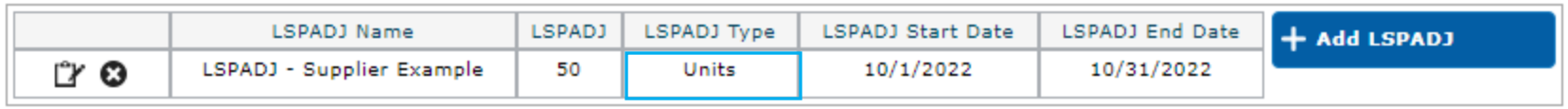
Order Summary item alert when LSPADJ dates are active AND the item is producing a SOQ



BLUEPRINT
embark. explore. embrace.

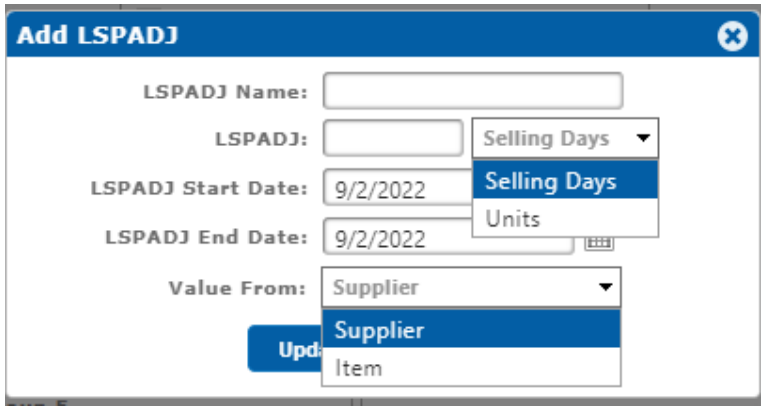
LSPADJ

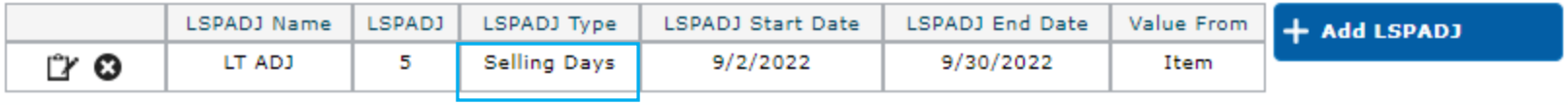
Supplier Manager



Edit and Delete options

Item Manager

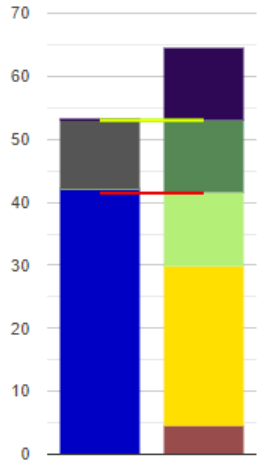




LSPADJ

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**
110.60 **Alternate Cost**
$110.60 **Effective Cost**
0.00 **Dependent Demand**

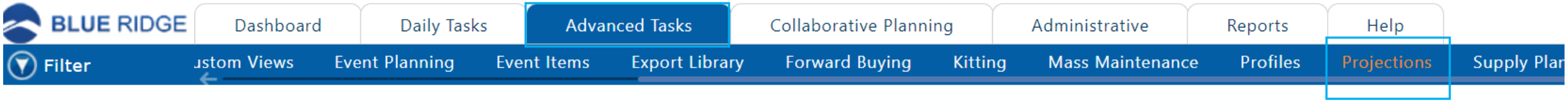
Recent Demand History

0.00 **Demand MTD**
59.42 **5/1/2022**
35.83 **4/1/2022**
48.00 **3/1/2022**
14.17 **2/1/2022**

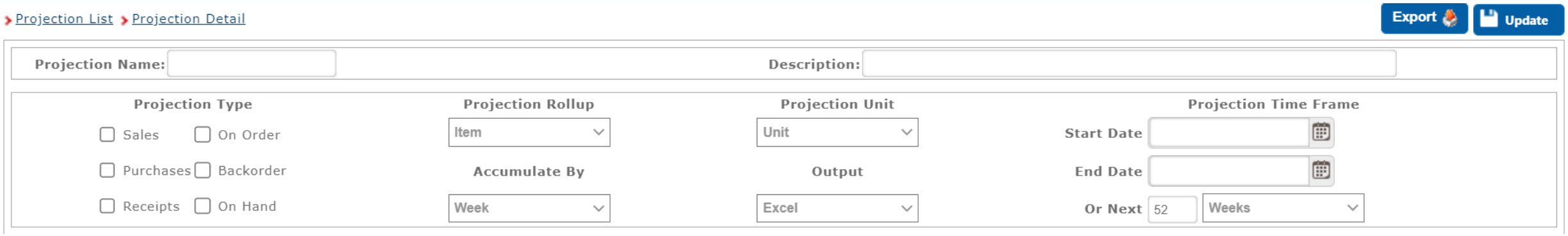
LSPADJ Name	LSPADJ	LSPADJ Type	LSPADJ Start Date	LSPADJ End Date
LT ADJ	5	Selling Days	9/2/2022	9/30/2022

View All LSPADJ For This Item

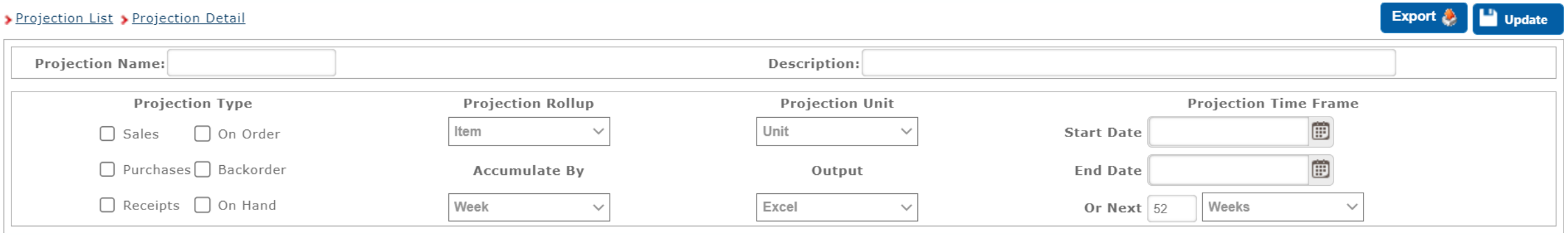
Projections



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

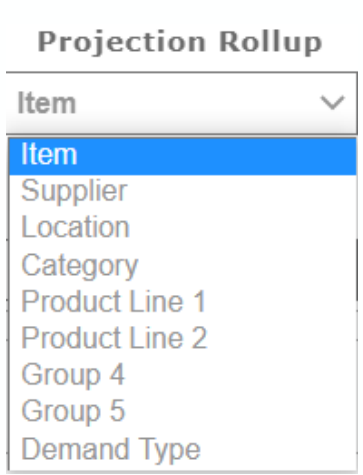


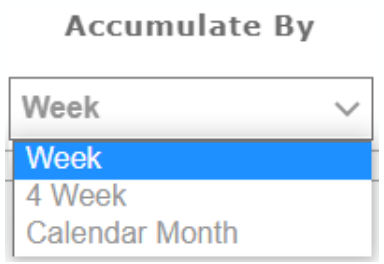
Projections

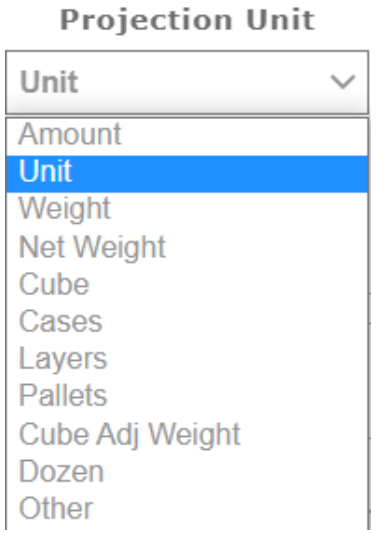


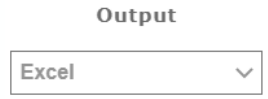
Projection Type

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

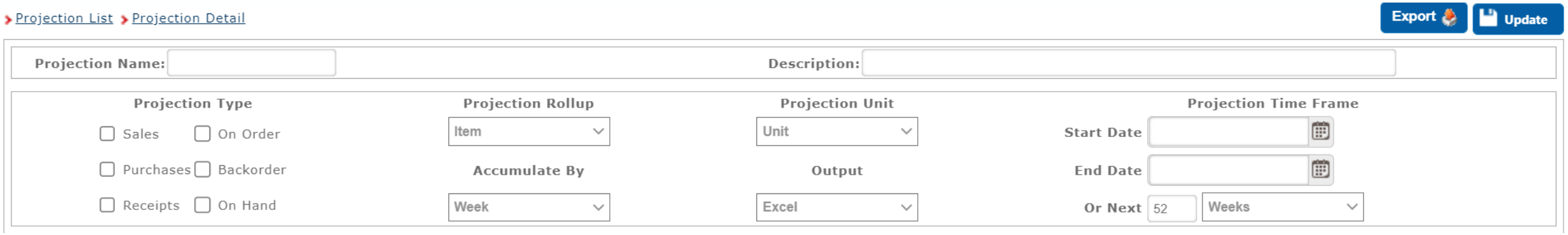








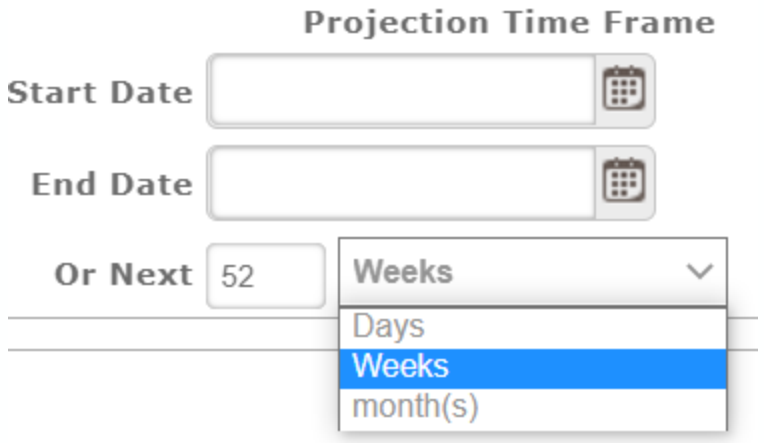
Projections



Use the Start Date and End Date

OR the

Next X Days, Weeks, Months



Export | Update

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

Projection Type

- [ ] Sales
- [ ] On Order
- [x] Purchases
- [ ] Backorder
- [ ] Receipts
- [ ] On Hand

Projection Rollup: Item

Projection Unit: Cases

Accumulate By: Calendar Month

Output: Excel

Projection Time Frame

Start Date: 10/1/2022

End Date: 12/31/2022

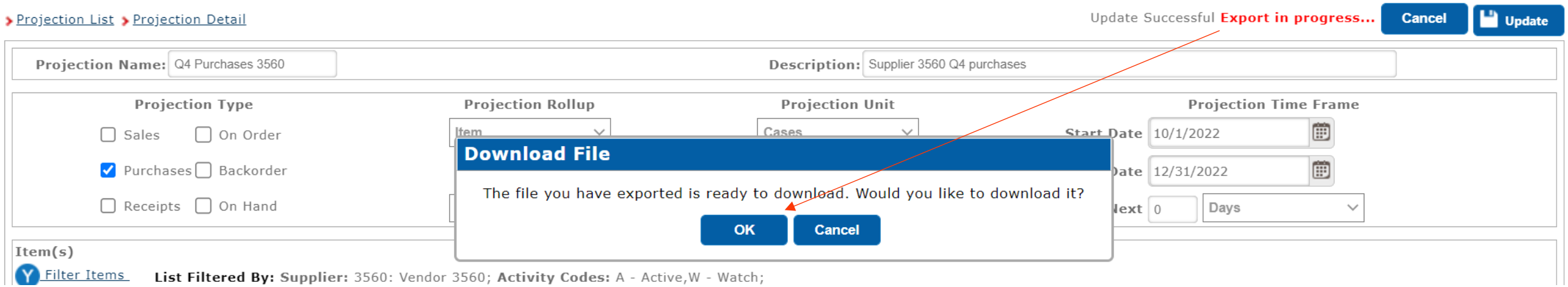
Or Next: 52 Weeks

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



Projections

Loads with a lot of details…

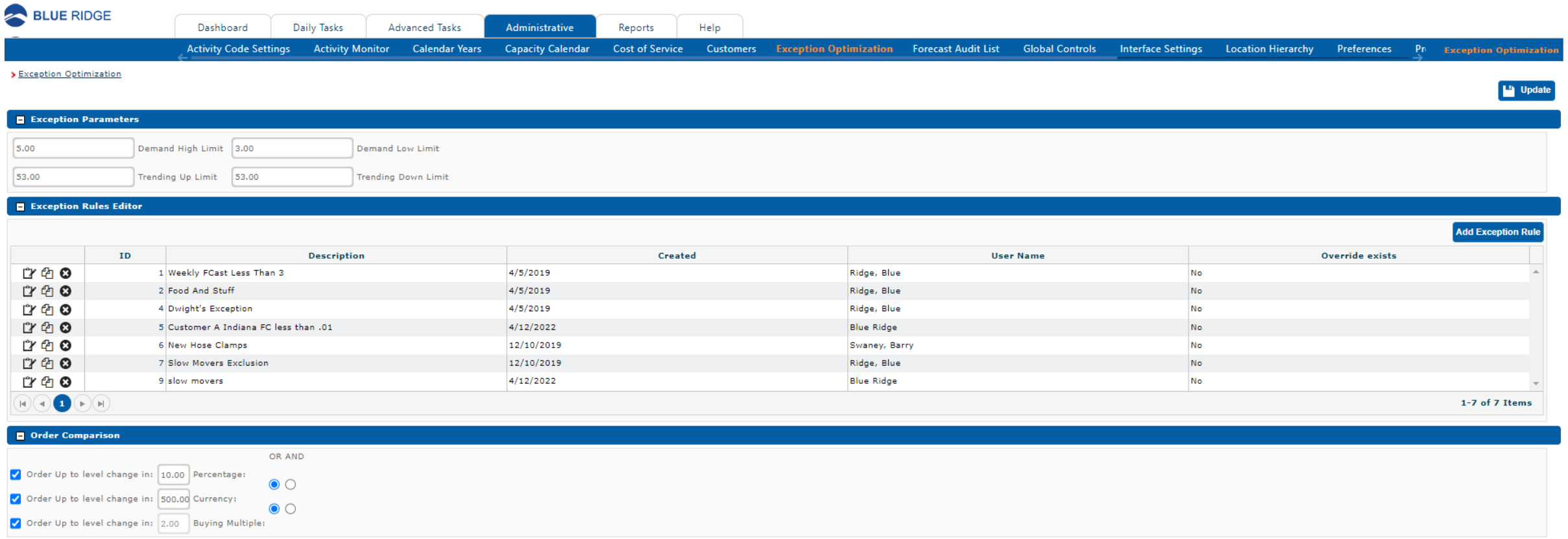
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W
1	Report Name:Q4 Purchases 3560																						
2	Rollup: Item																						
3	Accumulate By: Calendar Month																						
4	Unit: Cases																						
5	From: 10/1/2022																						
6	To: 12/31/2022																						
7	Filter Items: ActivityClass:Active,Watch;Supplier: 3560: Vendor 3560;																						
8	Type	Start	End	LocationN	Buyer	SourceId	Supplier	Activity	Velocity	Group01	Group02	Group03	Group04	Group05	Group06	ItemNuml	ItemDescr	UPC	Manufacti	LT	[10/01/2022]	[11/01/2022]	[12/01/2022]
9	Purchases	10/1/2022	12/31/202	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	12/31/202	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	12/31/202	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	12/31/202	DC1	Blue Ridg	3560	Vendor 35	A - Active	D	SUPPLIES	HVAC ACC	DRAIN PA		P2		197	3 IN PUMP			12	320	512	224
13	Purchases	10/1/2022	12/31/202	DC1	Blue Ridg	3560	Vendor 35	A - Active	D	PARTS	A/C COMP	MISC.		P2		198	DRAIN GU			14	400	300	400
14	Purchases	10/1/2022	12/31/202	DC1	Blue Ridg	3560	Vendor 35	A - Active	C	SUPPLIES	HVAC ACC	UNIT PADS		P2		199	PLASTIC P			16	480	360	360
15	Purchases	10/1/2022	12/31/202	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	12/31/202	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	12/31/202	WH1	Blue Ridg	3560	Vendor 35	A - Active	D	SUPPLIES	HVAC ACC	MISC.		P2		196	HEAT PUM			17	864	336	720

Report Name:Q4 Purchases 3560
Rollup: Item
Accumulate By: Calendar Month
Unit: Cases
From: 10/1/2022
To: 12/31/2022
Filter Items: ActivityClass:Active,Watch;Supplier: 3560: Vendor 3560;

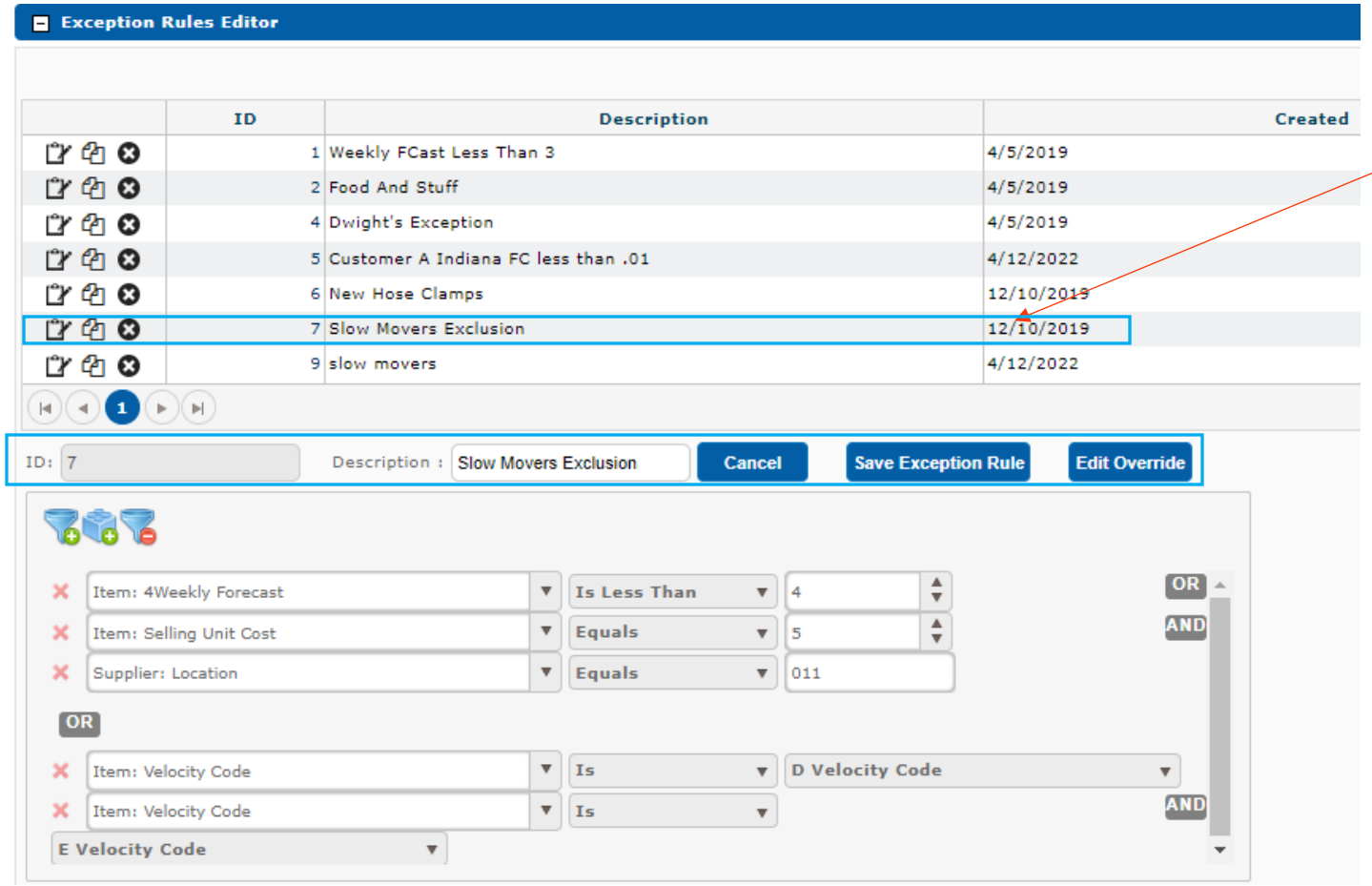
Projected SOQs by month

Type	Start	End	LocationName	SourceId	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

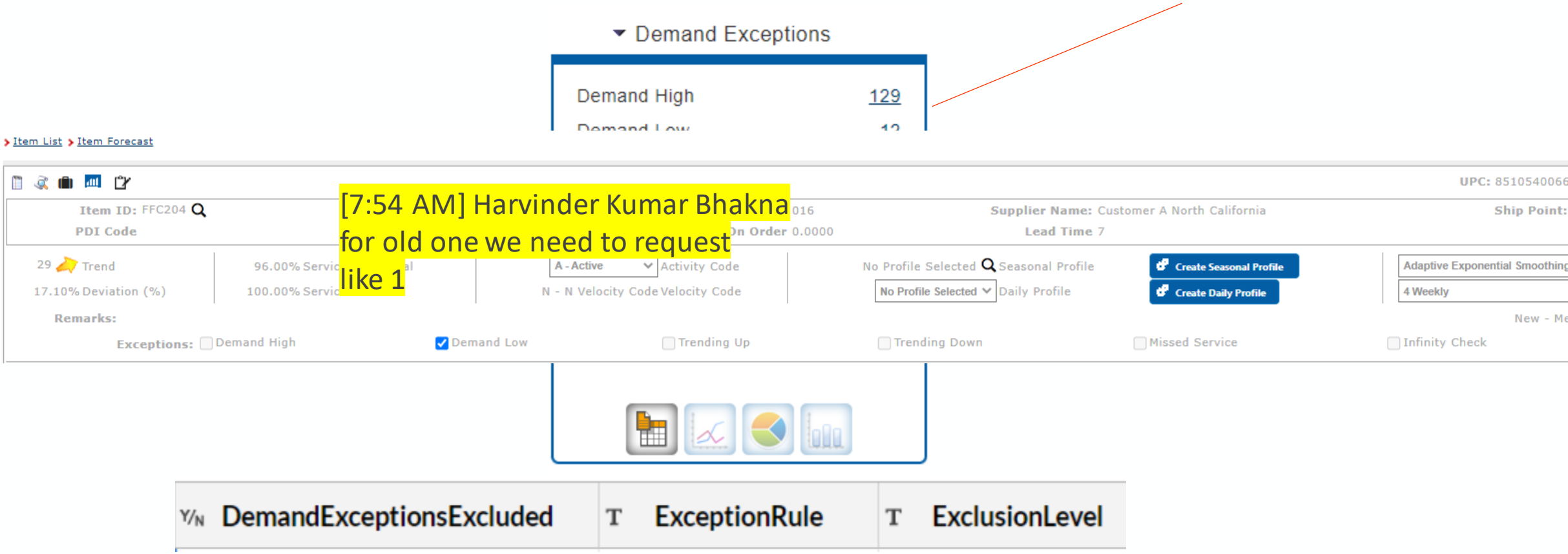
Exception Optimization



Exception Optimization



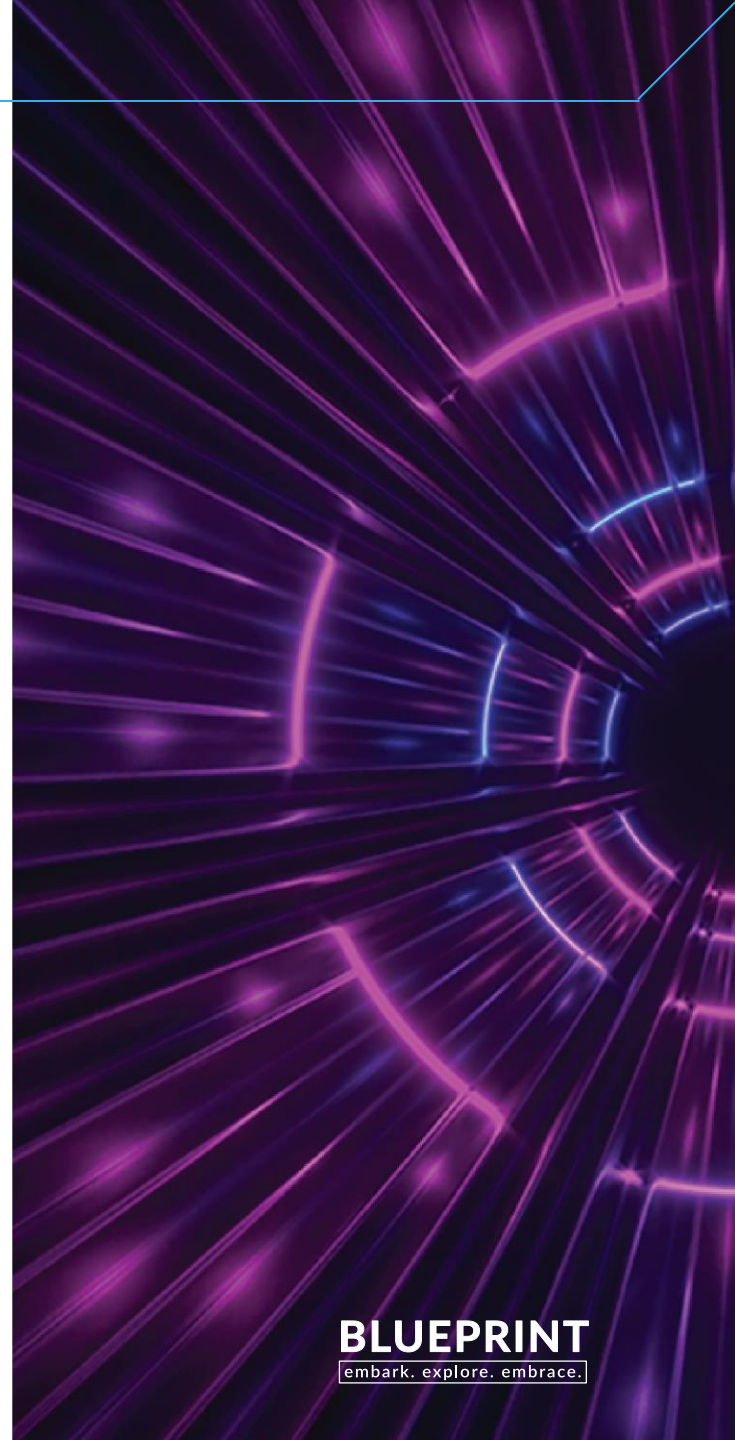
Exception Optimization



Export Library

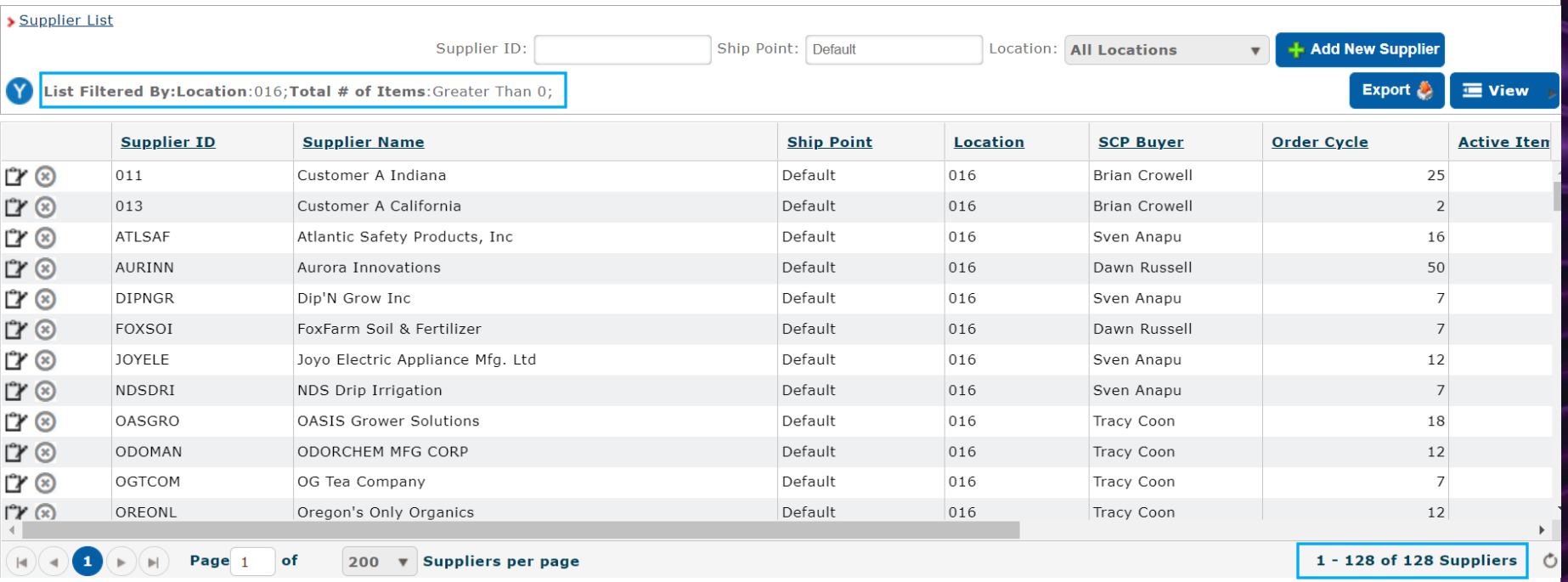
- Exports the list displayed
- Select any available field to be exported even if not displayed as a column on the list
- Save to Export Library
- Save Filter Criteria
- Export Library list and actions

Export option available wherever a list displays



Export Library

- Exports the list displayed



128 Suppliers – result of filter

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

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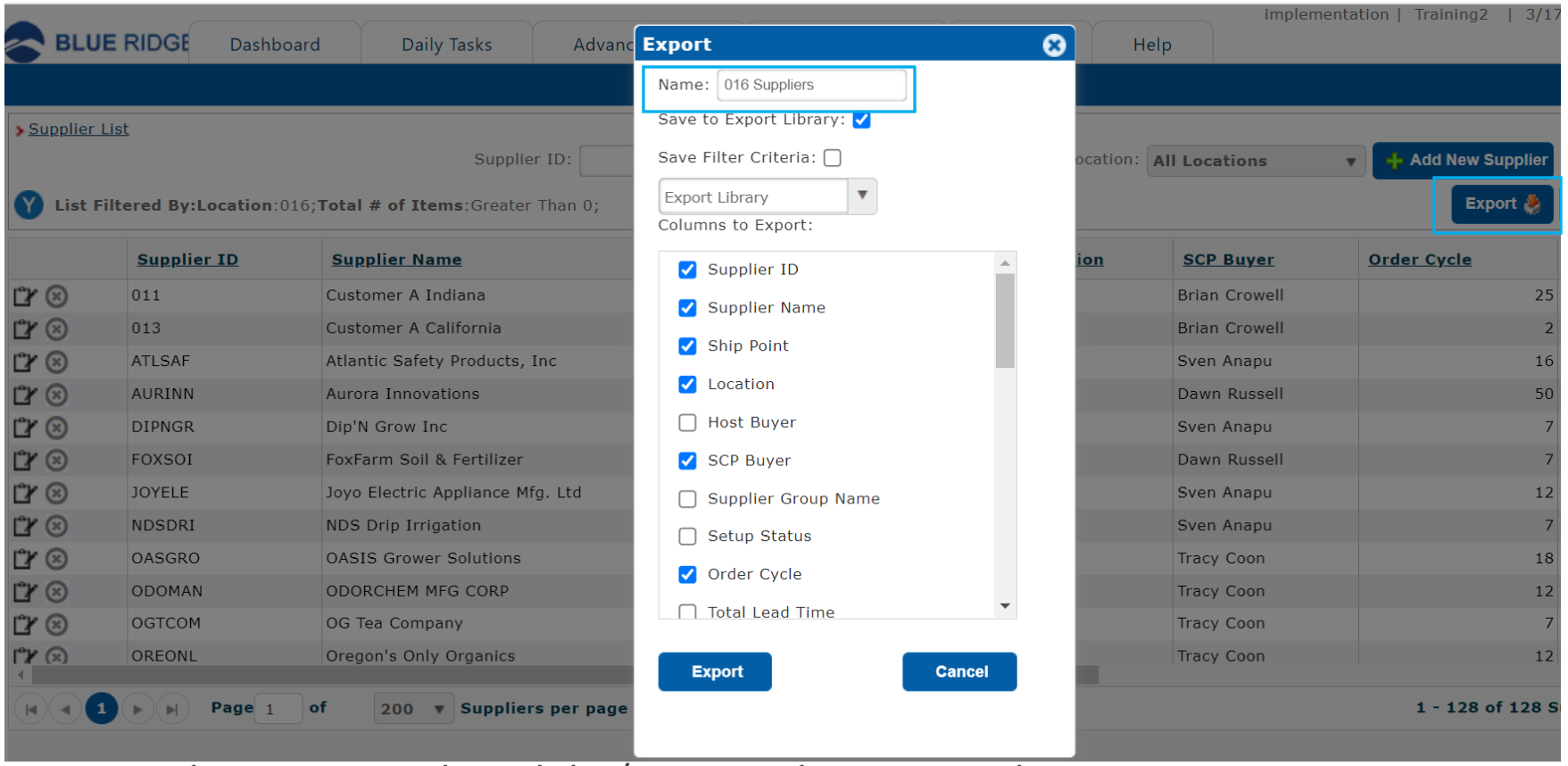
Export Library

- Select fields to be exported



Name – between 3 and 30 alpha/numeric characters only

Columns to Export – select desired boxes

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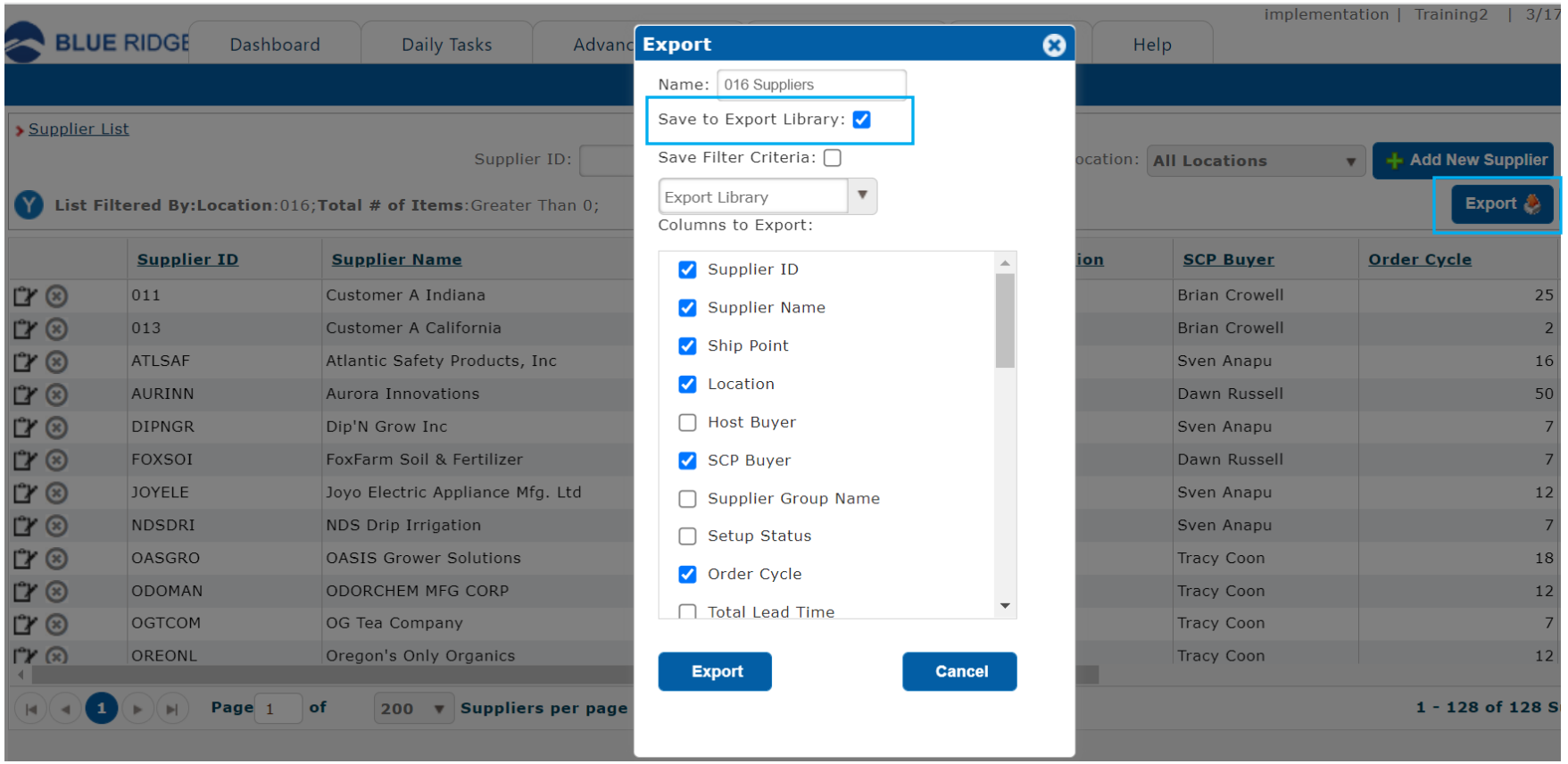
Export Library

- Save to Export Library



Select this option if this will be a common reoccurring export

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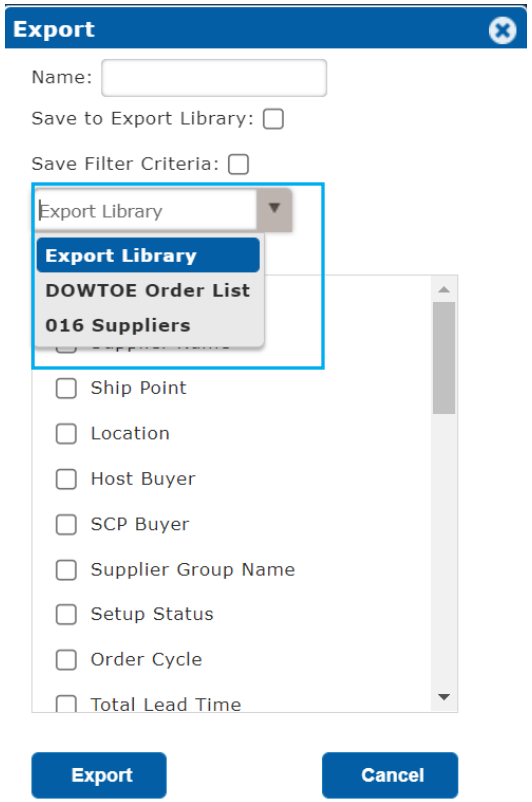
Export Library

- Save to Export Library



Select the Export Library dropdown and select saved Export

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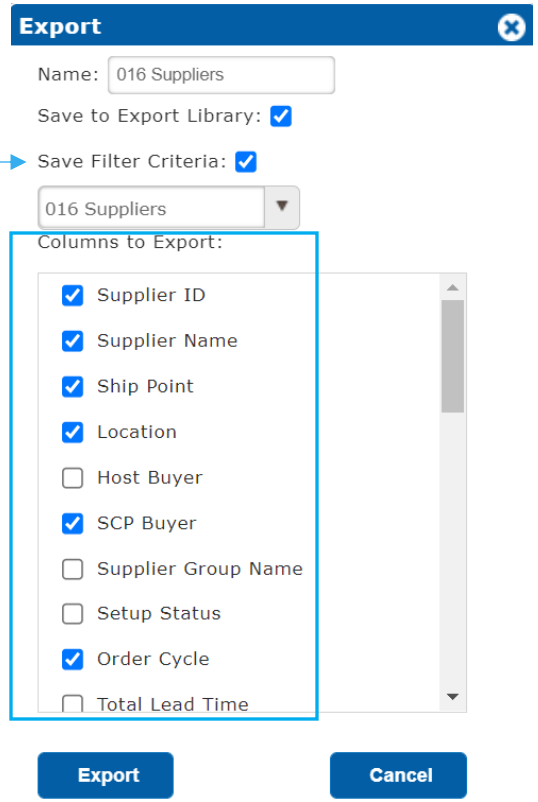
Export Library

- Save Filter Criteria



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

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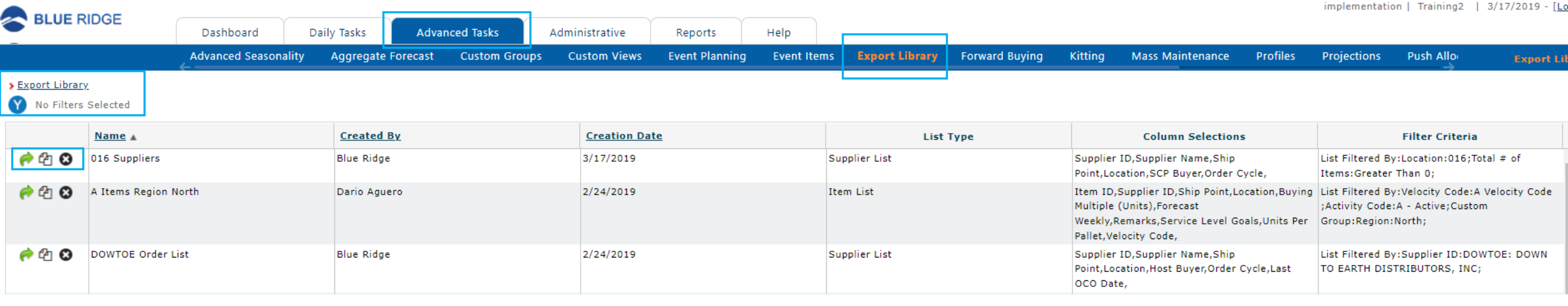
Export Library

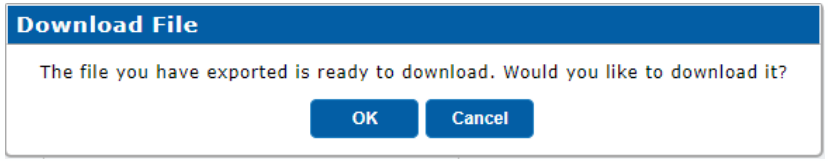
Advanced Tasks, Export Library



	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



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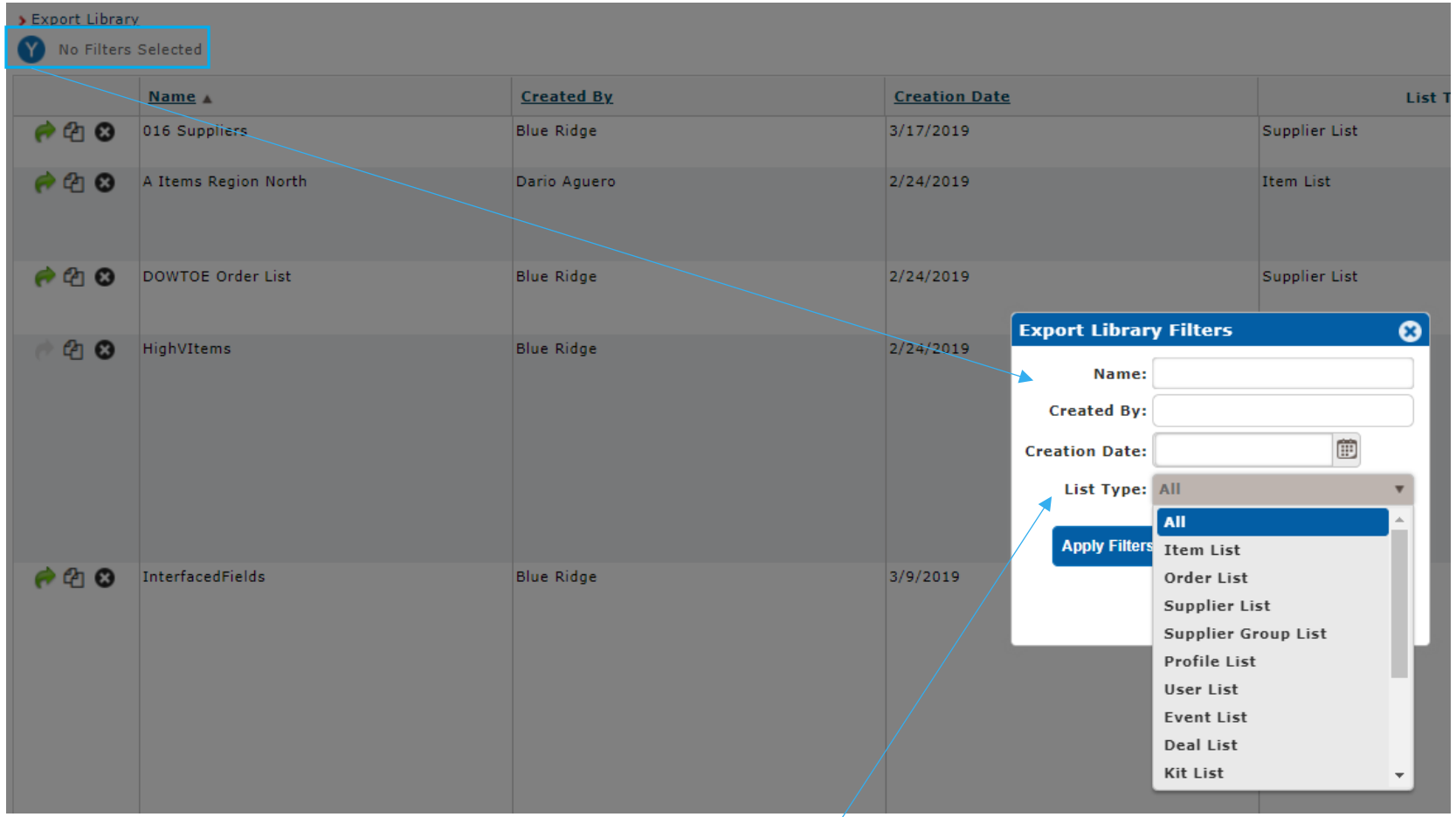
Export Library

Advanced Tasks, Export Library



Option to filter to screen specific Lists

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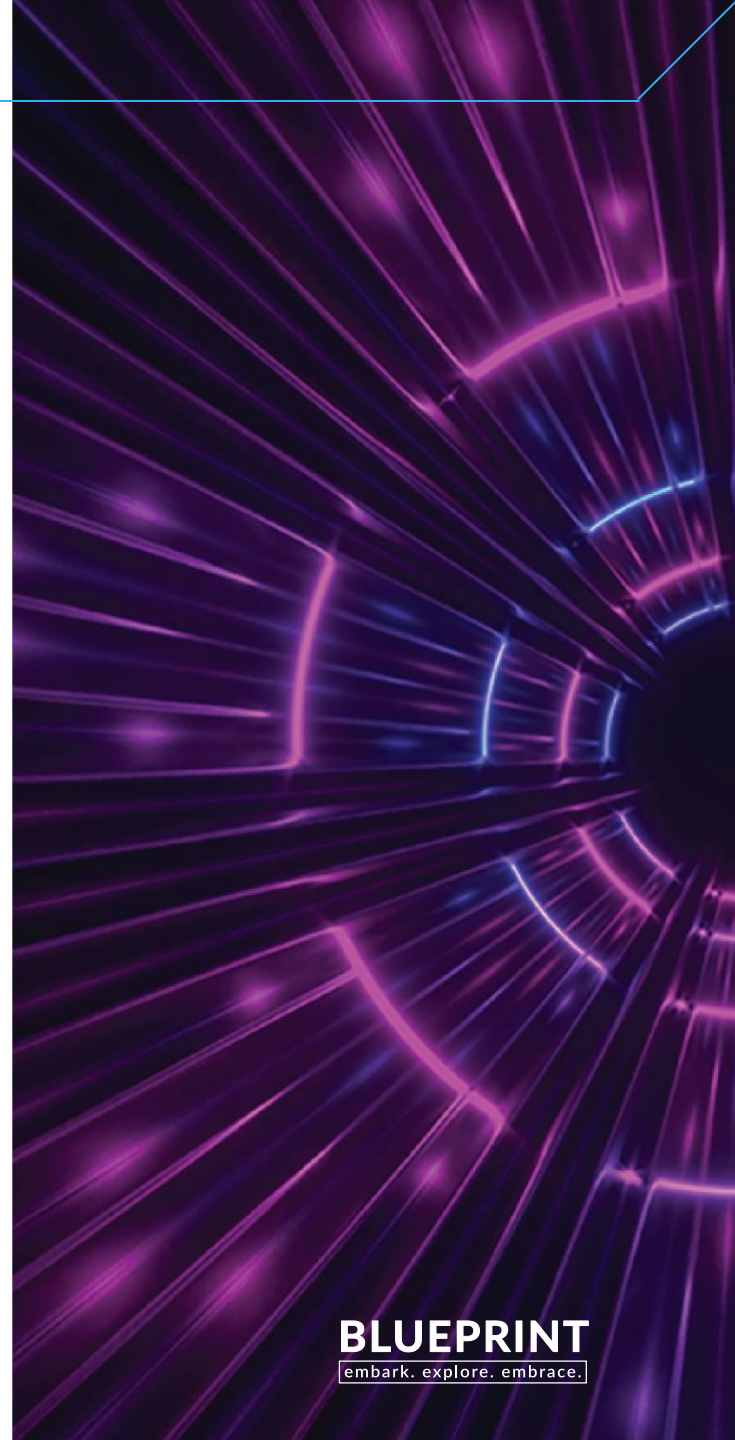
Warehouse Multiple

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

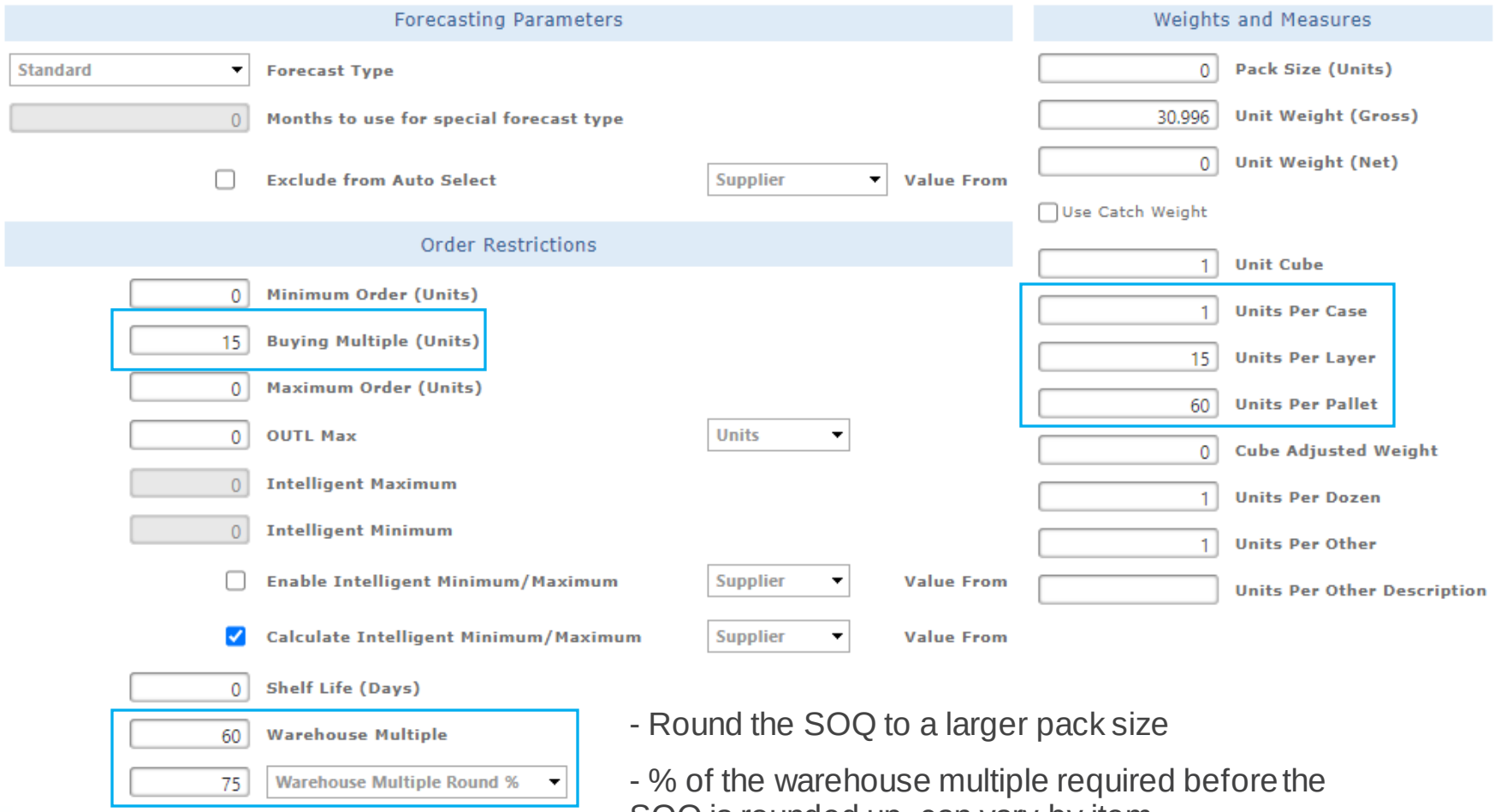
1	Units Per Case
5	Units Per Layer
60	Units Per Pallet

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



- Round the SOQ to a larger pack size

- % of the warehouse multiple required before the SOQ is rounded up, can vary by item

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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

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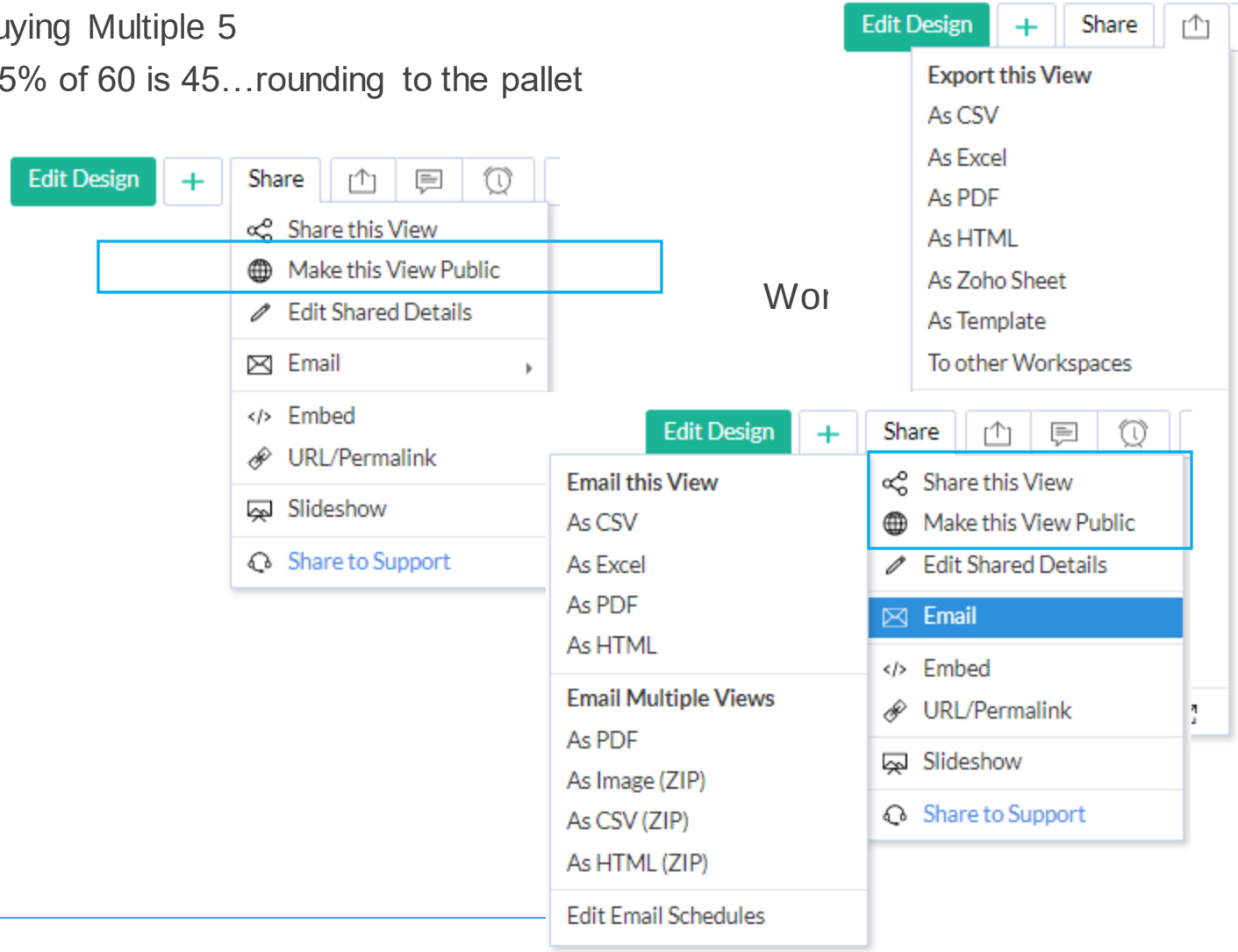
SCA Shareability

Buying Multiple 5

75% of 60 is 45…rounding to the pallet



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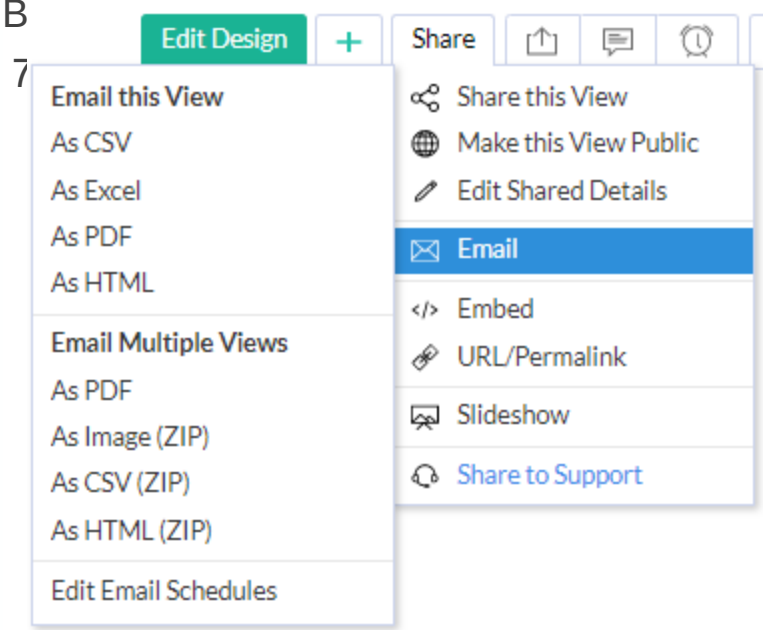
SCA Shareability

B

7

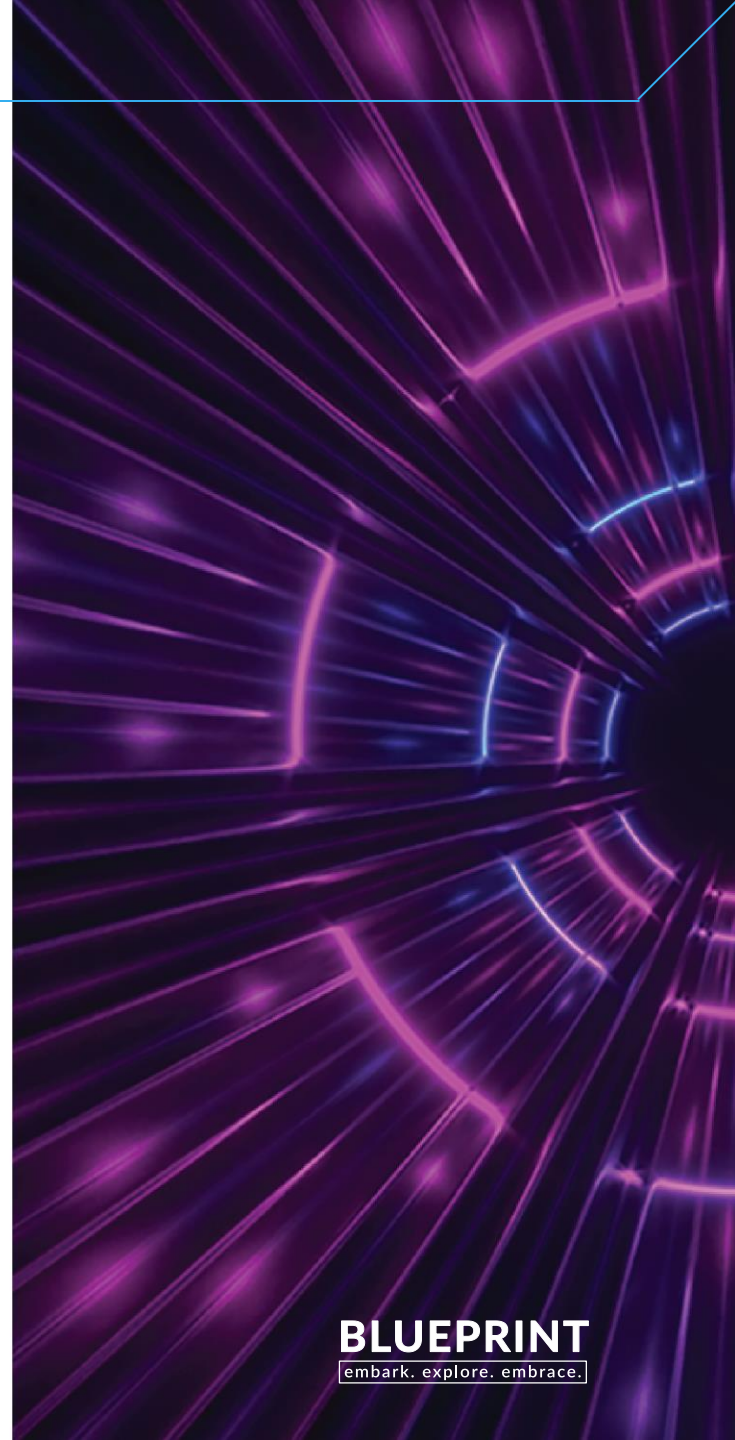


Works with Days Added

Edit Email Schedule

Schedule Count: 3

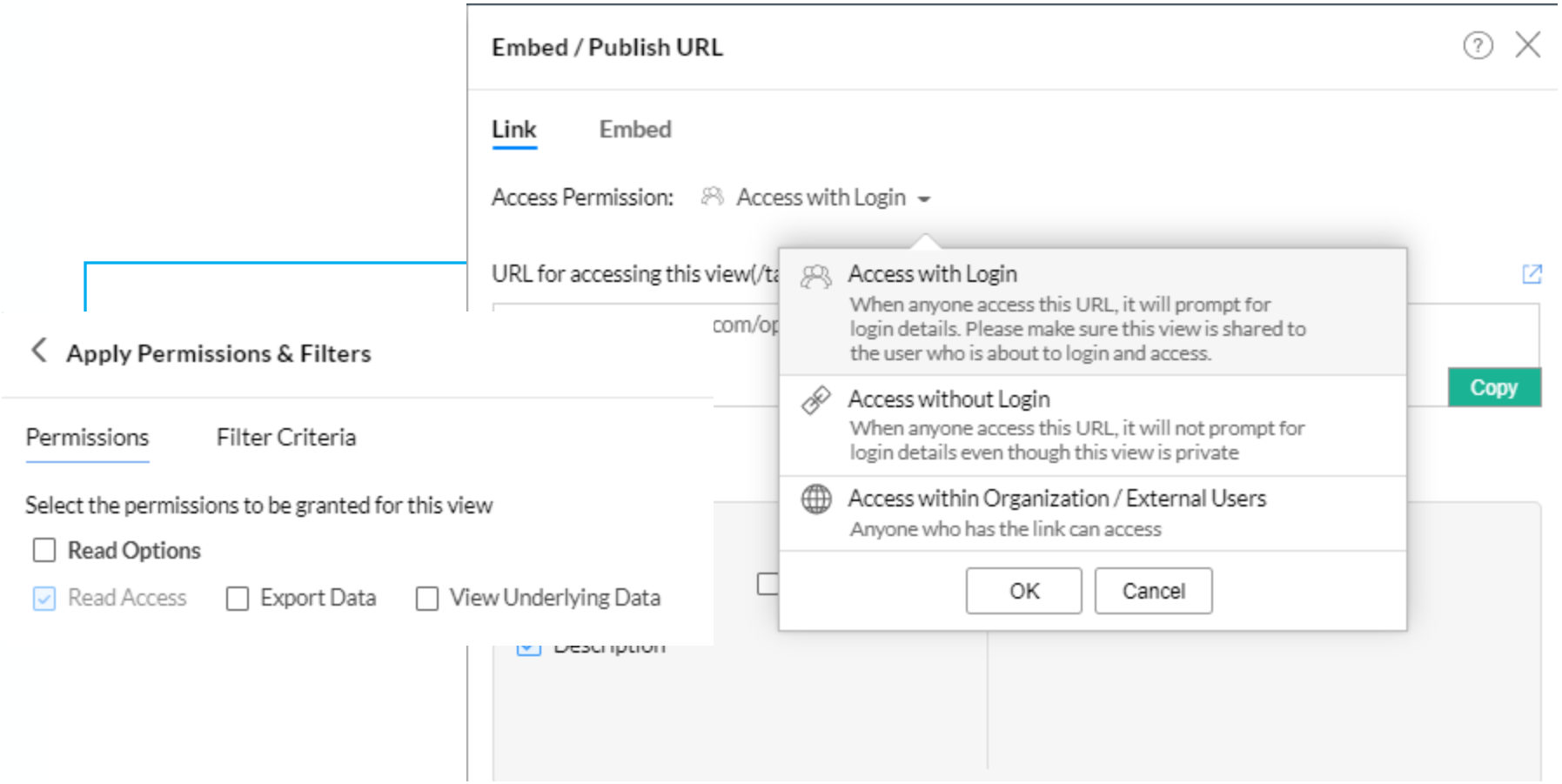
Schedule Name	Views	Schedule Period	Created By	Status	Schedules Consumed
Schedule-Altria Dashboard	1 View	Daily At 11:05 EST	analytics@brinv.com	Running	1
Schedule-ProjectedOutofStock	1 View	Daily At 10:30 EST	analytics@brinv.com	Running	1
Schedule-Item Count Alert	1 View	Daily At 11:05 EST	analytics@brinv.com	Running	1



SCA Shareability

Buying Multiple 5

75% of 60 is 45…rounding to the pallet



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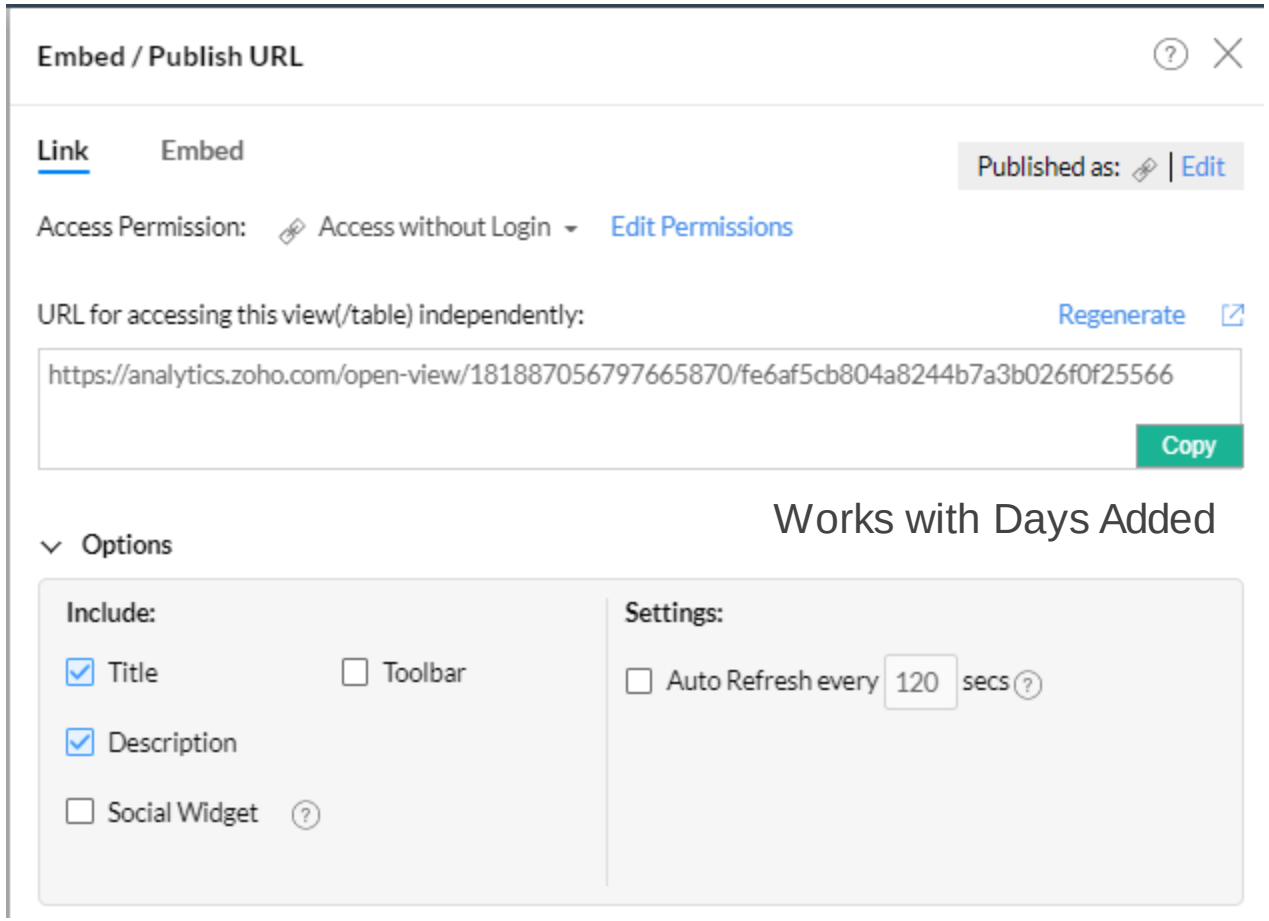
SCA Shareability

Buying Multiple 5

75% of 60 is 45…rounding to the pallet



Works with Days Added

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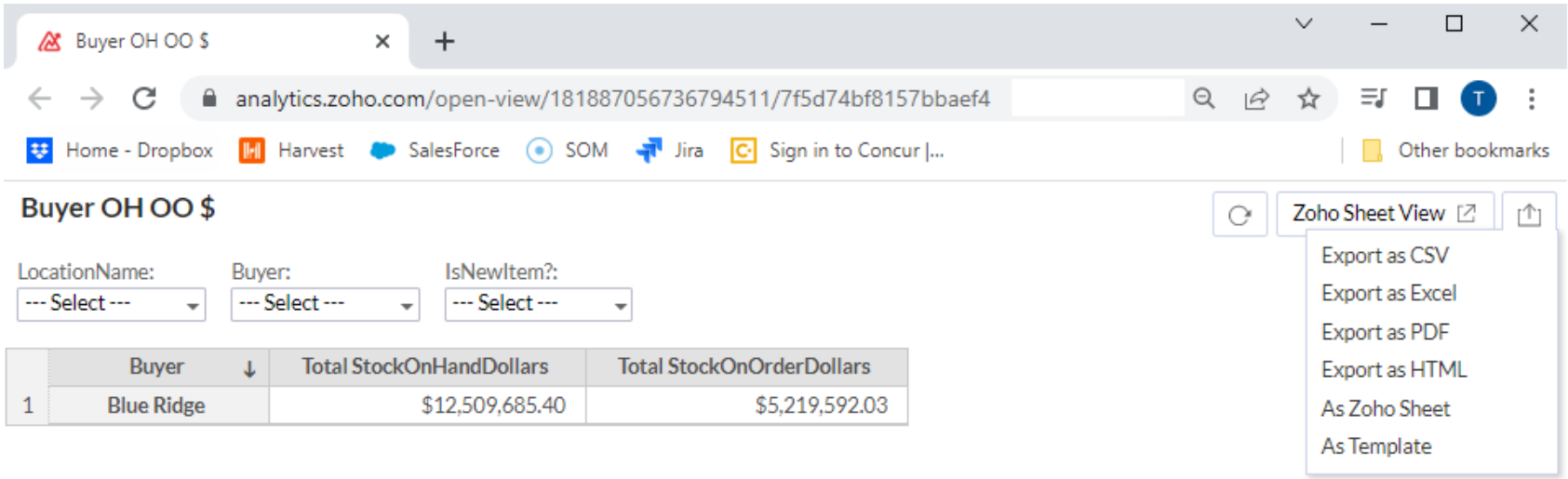
SCA Shareability

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

Buyer On Hand On Order $



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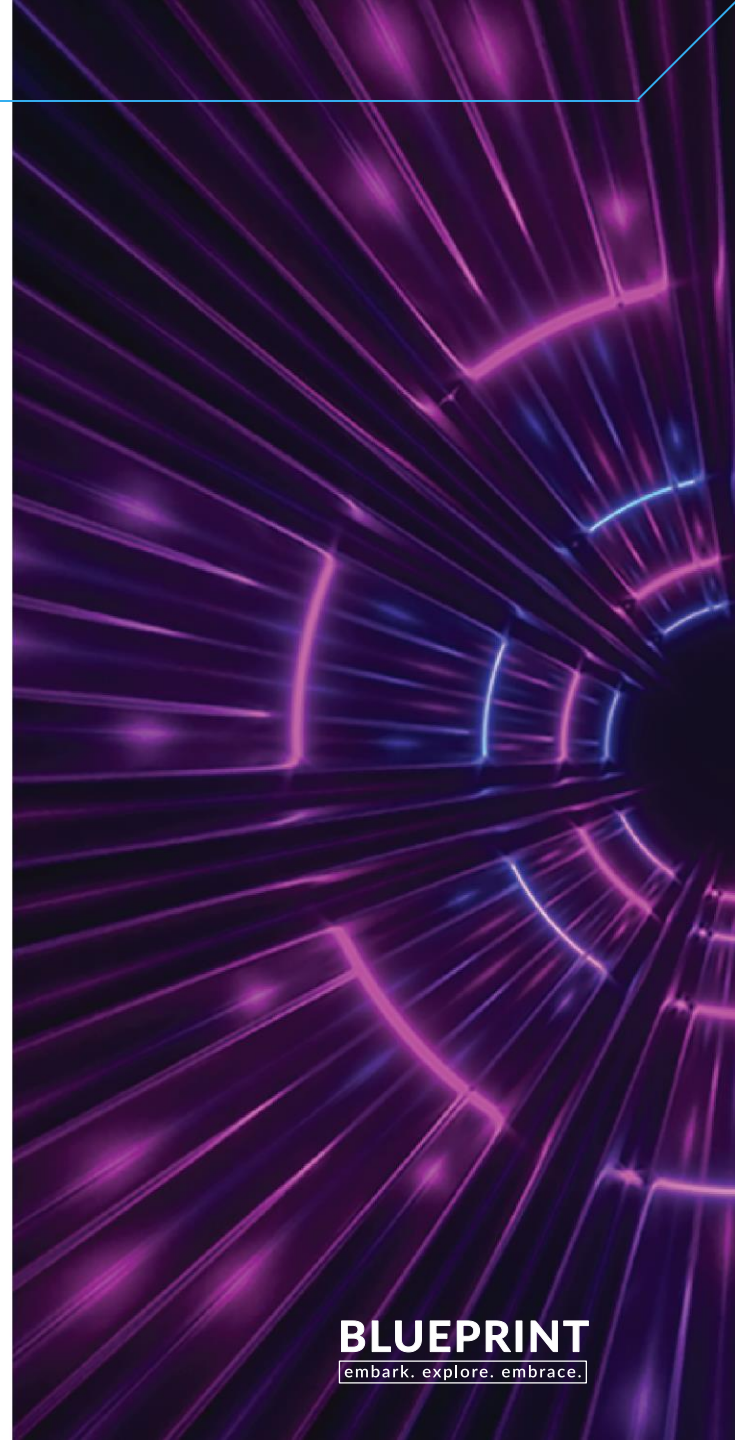
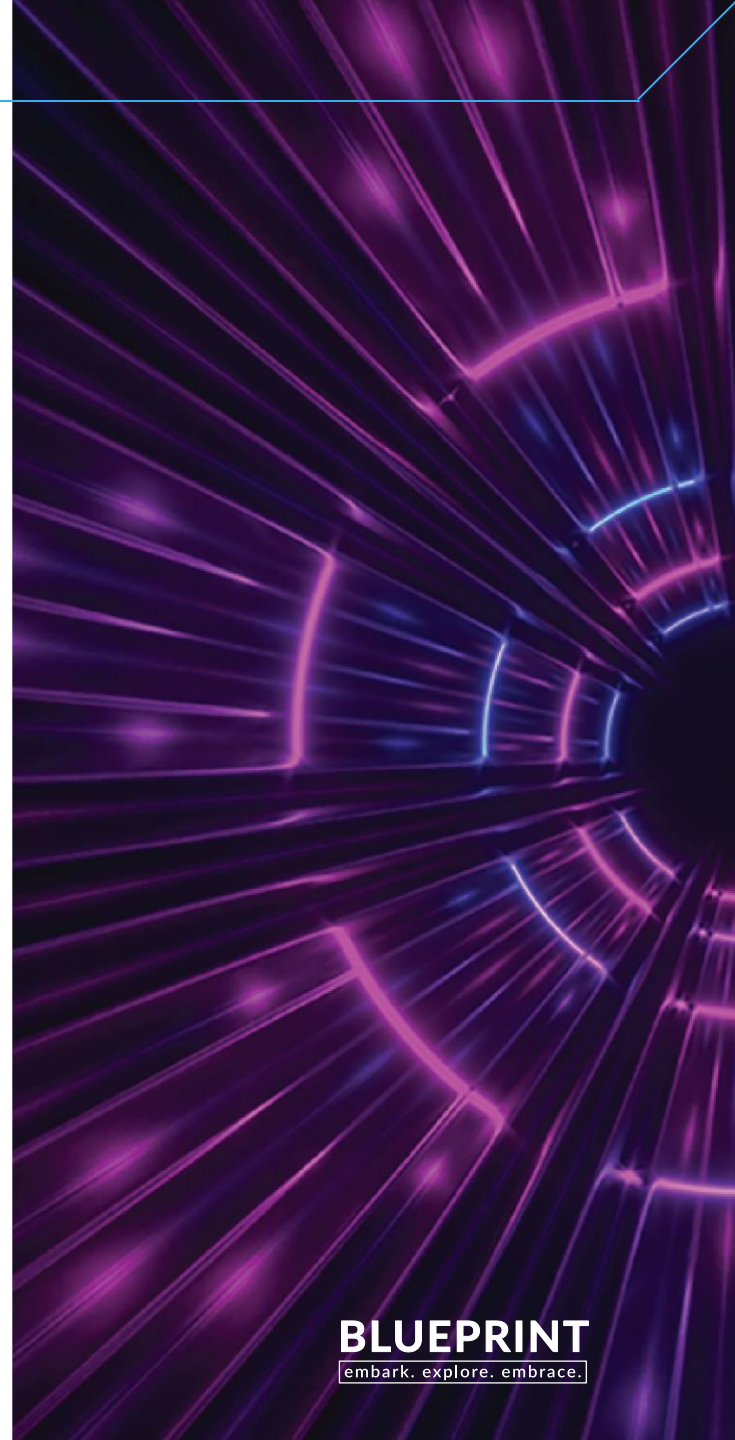
Custom Groups

Add notes here



Exception Optimization

Add notes here



Brackets with Discounts

Add notes here

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