

**SCHAEFFLER**



# **ZLPis in SupplyOn Training for Suppliers**

Schaeffler Industrial

May 2024

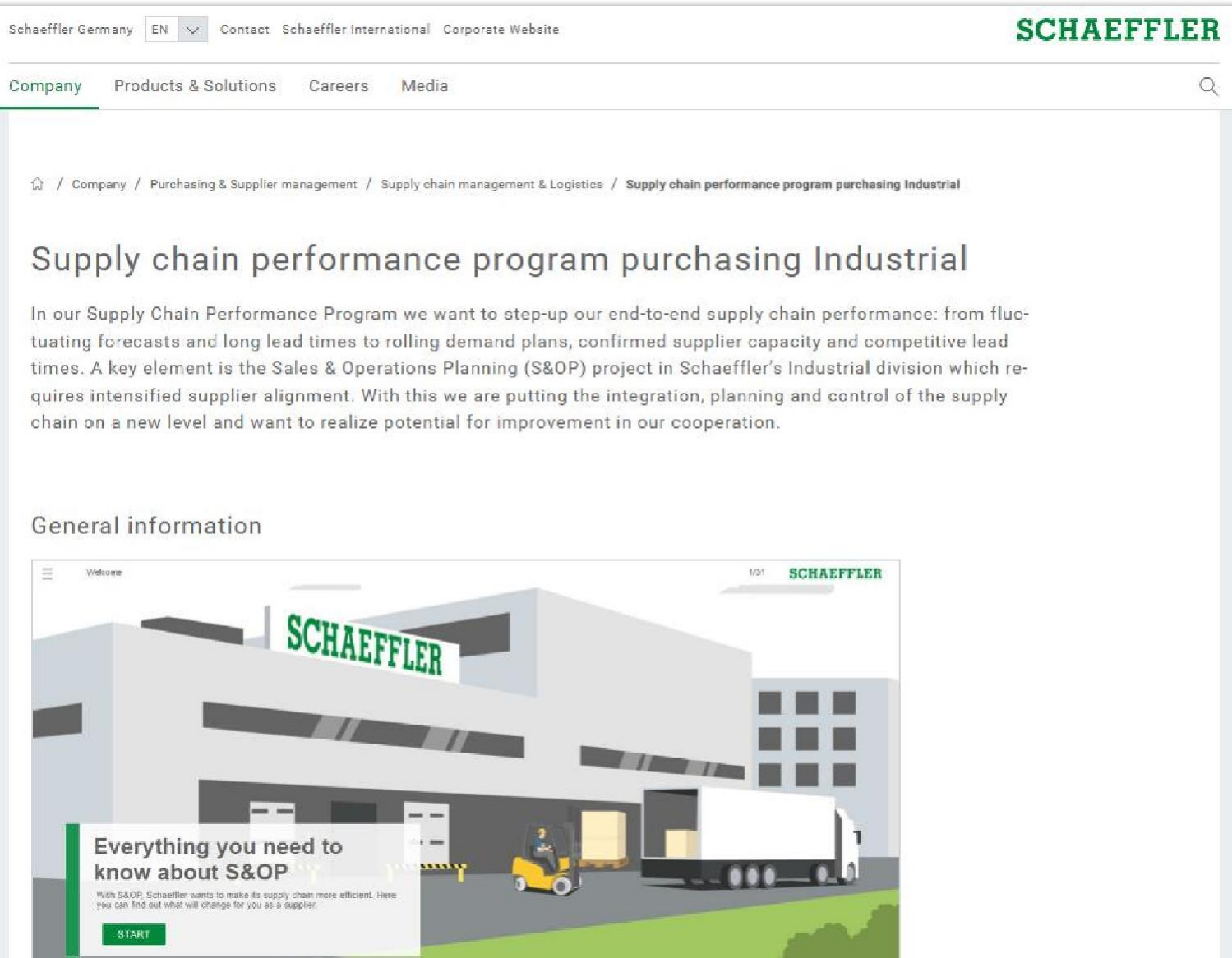
## Agenda

- 1** General information about S&OP and ZLPI
- 2 Training focus
- 3 Next steps

General information about S&OP and ZLPI

**SCHAEFFLER**

**You get all information about the S&OP Program on our Supplier Landing Page!**



Here you can find:

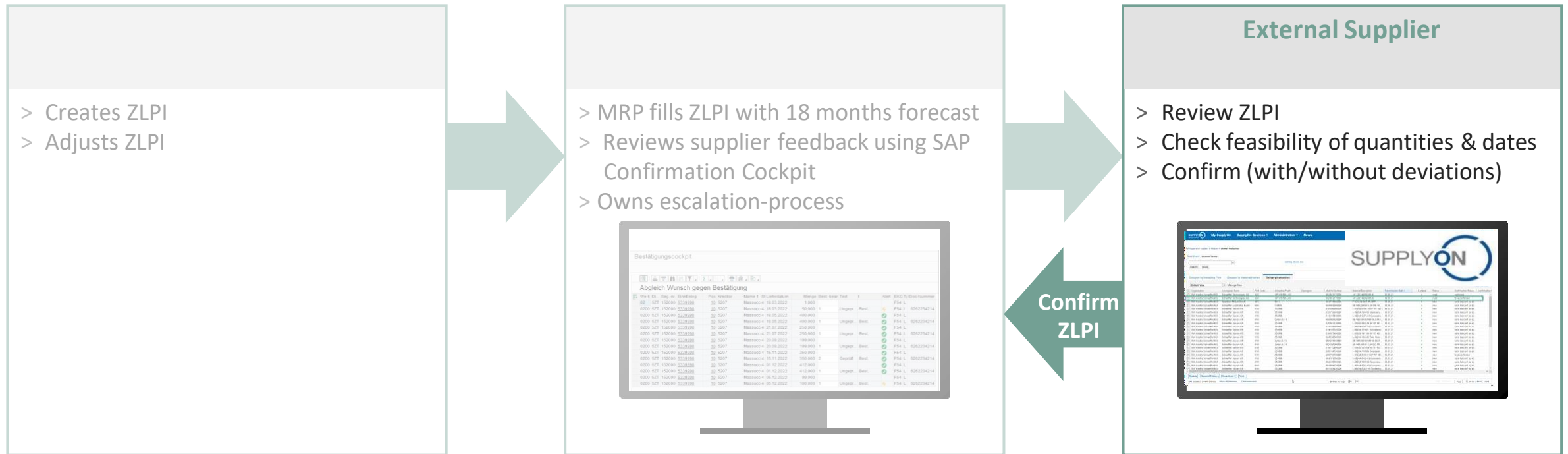
- Webinars for S&OP
- Communication material
- Information about the Supply Agreement

... and much more!



[Supply chain performance program purchasing Industrial | Schaeffler Germany](#)

# New scheduling agreement (ZLPI) for Schaeffler Industrial provides a long-term forecast and longer frozen horizons for suppliers in exchange for delivery line confirmations



- Early checking of alternatives** (e.g., smoothing of demand peaks over a time period, insourcing) where feasible
- Better transparency** in Scheduling due to feedback from suppliers on all ZLPI scheduling agreements (+ purchase orders)
- “Give-and-take logic”**: We provide an 18-month forecast & longer frozen horizons and expect reliable confirmations
- Proactive steering and escalations** if deviating supplier confirmations cannot be accepted by Schaeffler

ZLPI = new supply agreement with confirmation requirement; MRP = Material Requirement Planning

## General process: From receiving ZLPs to confirming scheduling lines



**All scheduling lines** of all scheduling agreements need to be **reviewed** as before. This **procedure does not change**.

If an **infeasibility** of an already confirmed scheduling line is **detected** by the supplier, an **adjustment of the confirmation** can be made subsequently to indicate bottlenecks early towards Schaeffler.

**Initially, all scheduling lines** need to be confirmed.

When the **ZLPI gets updated, only new and changed scheduling lines** need to be confirmed. Reasons for a changed scheduling lines can be the following:

- The horizon of the ZLPI is 18 months. Every month, the 19<sup>th</sup> month is added.
- Only the first 6 months are on a daily base, month 7-18 are cumulated on a monthly base. Every month, the 7<sup>th</sup> month is added with detailed scheduling lines.
- In case a deviating confirmation is accepted by Schaeffler, the ZLPI gets adapted to the deviation and therefore the correlating scheduling lines need to be reconfirmed.



## Agenda

**1** General information about S&OP and ZLPI

**2** **Training focus**

**2.1** Overview of SupplyOn

**2.2** Assigning required roles

**2.3** Accessing scheduling agreements and customizing search and view profiles

**2.4** Confirm scheduling lines with and without deviations

**2.5** Download and upload functionality for scheduling agreements

**2.6** Adjustment or integration of EDI interfaces

**3** Next steps

## Agenda

**1** General information about S&OP and ZLPI

**2** **Training focus**

**2.1** Overview of SupplyOn

**2.2** Assigning required roles

**2.3** Accessing scheduling agreements and customizing search and view profiles

**2.4** Confirm scheduling lines with and without deviations

**2.5** Download and upload functionality for scheduling agreements

**2.6** Adjustment or integration of EDI interfaces

**3** Next steps

# Overview of SupplyOn web-interface

The screenshot shows the SupplyOn web interface. At the top left is the 'SUPPLYON' logo. A navigation bar contains 'SupplyOn Services', 'News', 'Administration', and 'More'. The main content area features several service tiles: 'Business Directory', 'Document Management', 'Sourcing', and 'Supply Chain Collaboration'. A 'Tips & tricks' box is on the right. Callouts provide instructions: one points to the logo, another to the 'Administration' menu, and two others describe how to use the service tiles.

Here you find all relevant information and settings for your account.

You can get back always here by clicking on the SupplyOn logo.

By using the tiles, you can enter different services. The same services you can find in the menu top left.



## Agenda

**1** General information about S&OP and ZLPI

**2** **Training focus**

2.1 Overview of SupplyOn

**2.2 Assigning required roles**

2.3 Accessing scheduling agreements and customizing search and view profiles

2.4 Confirm scheduling lines with and without deviations

2.5 Download and upload functionality for scheduling agreements

2.6 Adjustment or integration of EDI interfaces

**3** Next steps

## Assigning roles via user account settings

The screenshot displays the SupplyOn Services dashboard. At the top, the navigation bar includes the SupplyOn logo, 'SupplyOn Services', and a dropdown menu labeled 'Administration' (marked with a green circle '1'). The 'Administration' dropdown is open, showing options: 'My User Account' (marked with a green circle '2'), 'My Substitutes', 'User Management', 'Customer Responsible', 'Logistics Settings', and 'My user administrators'. A callout box points to 'My User Account' with the text: 'To assign the required roles, go to "Administration" → "My User Account"'. The dashboard features several widgets: 'Business' (with 'Open' button), 'Document Management' (with 'Open' button), 'Sourcing' (showing 0 requests due and 0 open requests), and 'Supply Chain Collaboration' (with 'Open' button). A 'Tips & tricks' box is visible on the right side.

# Assigning roles via user account settings

The screenshot shows the 'My roles' section of the SUPPLYON user interface. A callout box points to the 'My roles' tab with the instruction: "Go to 'My Roles' and expand 'Supply Chain Collaboration'". A second callout points to the 'Supply Chain Collaboration' group, which is partially assigned. A third callout points to the 'Collapse' button next to this group. Below the group, a table lists the roles assigned to the user.

Role	Status	Description
<input type="checkbox"/> GTDImportSellerStd	not assigned	Access to Supply Chain Collaboration Global Trade data.
<input checked="" type="checkbox"/> PackageDataSellerRead	assigned	View the package related supplier master data for articles, packing material and packing instructions. View the package related customer article master data and the customer packing material.
<input checked="" type="checkbox"/> PackageDataSellerWrite	assigned	Change the package related article supplier master data, packing material and packing instructions. View package related customer article master data and packing material.
<input type="checkbox"/> SupplyChainMonitorSellerAdmin	not assigned	Display supply chain monitor articles, display and modify masterdata, display and modify supplier site master data.
<input type="checkbox"/> SupplyChainMonitorSellerRead	not assigned	Display supply chain monitor articles.
<input type="checkbox"/> SupplyChainMonitorSellerStd	not assigned	Display supply chain monitor articles, display and modify master data.
<input type="checkbox"/> TOMSSellerASNWrite	not assigned	View the required transport volume (FPA) of the supplier. Change and create the shipping notification data (ASN) including the actual transport volumes. Display the due deliveries. Note: this role should only be assigned to users if the supplier is using SupplyOn Transport Management (TOMS) with a customer.
<input type="checkbox"/> TOMSSellerFPAASNRead	not assigned	View the the required transport volume (FPA) of the supplier and display the shipping notification data (ASN) including the actual transport volumes. Display the due deliveries. Note: this role should only be assigned to users if the supplier is using SupplyOn Transport Management (TOMS) with a customer.
<input type="checkbox"/> TOMSSellerFPAWrite	not assigned	Change and create the required transport volume (FPA) of the supplier. View the shipping notification data (ASN) including the actual transport volumes. Display the due deliveries. Note: this role should only be assigned to users if the supplier is using SupplyOn Transport Management (TOMS) with a customer.
<input checked="" type="checkbox"/> WebEDISellerASN	assigned	Recording delivery and transportation data.
<input checked="" type="checkbox"/> WebEDISellerASNNewRead	assigned	Read access to due deliveries and ASN (Standalone). Execute print function for ASN (Standalone) process.
<input type="checkbox"/> WebEDISellerASN_TMS	not assigned	Display due deliveries and create ASN (Transport Management). Execute print functionality for the ASN (Transport Management) process.
<input type="checkbox"/> WebEDISellerASN_TMSRead	not assigned	Read access to due deliveries and ASN (Transport Management). Execute print function for the ASN (Transport Management) process.

# Assigning roles via user account settings

<input checked="" type="checkbox"/>	WebEDISellerAdmin	assigned	Access to Supply Chain Collaboration. The CompanyAdmin and ControlPointAdmin roles are not included.
<input type="checkbox"/>	WebEDISellerDP	not assigned	Access to development parts.
<input type="checkbox"/>	WebEDISellerDP_OR	not assigned	Access to development parts. Sending order confirmations to the purchasing company.
<input checked="" type="checkbox"/>	WebEDISellerDTM	assigned	Access to DTM UI for configuration of downloads.
<input type="checkbox"/>	WebEDISellerDemandReminder	not assigned	Display to demand reminder messages.
<input type="checkbox"/>	WebEDISellerDemandReminderConf	not assigned	Display and confirm demand reminder messages.
<input type="checkbox"/>	WebEDISellerFC	not assigned	Access to Forecast Collaboration module. Creating and editing supply plans.
<input type="checkbox"/>	WebEDISellerFPA	not assigned	Receiving delivery and transportation data for forwarding agents.
<input type="checkbox"/>	WebEDISellerFPA_TMS	not assigned	Display due deliveries and create FPA (Transport Management). Execute print functionality for the FPA (Transport Management) process.
<input type="checkbox"/>	WebEDISellerFPA_TMSRead	not assigned	Read access to due deliveries and FPA (Transport Management). Execute print function for the FPA (Transport Management) process.
<input type="checkbox"/>	WebEDISellerFinance	not assigned	Access to self billing invoices, invoices, reevaluations, remittance advices and settlement advices.
<input type="checkbox"/>	WebEDISellerGRRRead	not assigned	Read access to the Goods Receipt screen.
<input type="checkbox"/>	WebEDISellerIC	not assigned	Access to Issue Center.
<input type="checkbox"/>	WebEDISellerKanban	not assigned	Display of Kanbans.
<input checked="" type="checkbox"/>	WebEDISellerLogistics	assigned	Access to logistical processes (requirement instructions, delivery and transport data and stock movements). Self billing invoices.
<input type="checkbox"/>	WebEDISellerOverdueDevAlert	not assigned	Display alerts for overdue and deviating confirmations.
<input checked="" type="checkbox"/>	WebEDISellerPO	assigned	Access to purchase orders.
<input checked="" type="checkbox"/>	WebEDISellerPO_OR	assigned	Access purchase orders and order confirmations.
<input checked="" type="checkbox"/>	WebEDISellerReleases	assigned	Access to delivery instructions and delivery instruction confirmations or delivery instruction acknowledge receipts.
<input checked="" type="checkbox"/>	WebEDISellerSR	assigned	View schedule responses.
<input checked="" type="checkbox"/>	WebEDISellerSR_OR	assigned	Edit schedule responses.
<input type="checkbox"/>	WebEDISellerStock	not assigned	Viewing stock movements.
<input type="checkbox"/>	WebEDI_EntryOfServicesPerformed	not assigned	Display and send values for services performed. The purchase order is received via Supply Chain Collaboration.
<input checked="" type="checkbox"/>	elnv Seller Admin	assigned	Supplier administration role for eInvoicing.
<input checked="" type="checkbox"/>	elnv Seller P2P	assigned	Supplier can create invoices. Procure 2 Pay - based on demand.
<input type="checkbox"/>	elnv Seller Read only	not assigned	Supplier can display sent invoices - eInvoicing.
<input type="checkbox"/>	elnv Seller Standalone	not assigned	Supplier can create invoice from scratch.
<input type="checkbox"/>	elnvSellerRAReadonly	not assigned	Seller access - Remittance Advices
<input checked="" type="checkbox"/>	elnvSellerSBRReadonly	assigned	Seller access - Self billing Invoices

User Management (partially assigned)

1

Mark these roles (1) and press "Request" (2).

2

**Please note:** Requested roles are organized by your company's administrator!

## Agenda

**1** General information about S&OP and ZLPI

**2** **Training focus**

2.1 Overview of SupplyOn

2.2 Assigning required roles

**2.3 Accessing scheduling agreements and customizing search and view profiles**

2.4 Confirm scheduling lines with and without deviations

2.5 Download and upload functionality for scheduling agreements

2.6 Adjustment or integration of EDI interfaces

**3** Next steps

# Access to ZLPI scheduling agreements and scheduling lines via Supply Chain Collaboration

The screenshot displays the SupplyOn Services dashboard. At the top, there is a navigation bar with 'SupplyOn Services', 'News', 'Administration', and 'More'. A user profile is visible on the left. A dropdown menu is open, showing options: Sourcing, Business Directory, Document Management, Supply Chain Collaboration (highlighted with a green box), and Flexible Survey. A callout box points to the 'Supply Chain Collaboration' tile on the dashboard, which is also highlighted with a green box. The callout text reads: 'To access ZLPs, click on the "Supply Chain Collaboration" tile or open the correlating menu.' The dashboard contains several tiles: 'Business Directory' (Find and edit the master data of your company), 'Document Management' (Receive and review important documents customers), 'Sourcing' (Requests due within 7 days: 0, Open requests: 0, Published auctions activated within 7 days: 0), and 'Supply Chain Collaboration' (Access the demand and delivery processes including E-Invoicing). A 'Tips & tricks' section on the right provides instructions on how to return to the home page and find supplementary sections.



## Access ZLPI scheduling agreements using the tile or menu

The screenshot shows the SUPPLYON QAS/PrePRO interface. The top navigation bar includes 'SupplyOn Services', 'News', 'Administration', and 'More'. The left sidebar is titled 'Supply Chain Collaboration' and contains a menu with items like 'Dashboard', 'Demand', 'Orders', 'Scheduling Agreements', 'Delivery Instructions' (highlighted with a green box and a '1' notification), 'Delivery Forecasts', 'JIT Call-offs', 'Kanban', 'Schedule Responses', 'Planning', 'Delivery', 'Monitoring', and 'Invoicing'. The main dashboard area displays several tiles: 'Orders' (0 Total New Orders & Updates), 'Delivery Instructions' (1 Current New Delivery Instructions, highlighted with a green box), 'Delivery Forecasts' (0 Current new Delivery Forecasts), 'JIT Call-Offs' (0 Current new JIT Call-Offs), 'Confirmable Orders' (0 Total Confirmable Orders), 'Alerts' (19 Total New Alerts), 'Advance Shipping Notice' (79 ASN Creation Due, 4 Pending ASN), and 'Due Deliveries' (79 Overdue). A callout box points to the 'Delivery Instructions' tile with the text: 'Within “Supply Chain Collaboration”, go to “Delivery Instructions”. The counter shows how many new ZLPs need to be confirmed.'

## Creating new customized search profiles

SupplyOn > Supply Chain Collaboration > Delivery Instructions

**Delivery Instructions**

Download More

	Material (Cust...	Material d					
<input type="checkbox"/>	...	tsa 24042024-...	KLEBESPACER 21X29X4.7	5500058303		Read	
<input type="checkbox"/>	...	tsa 24042024-...	KLEBESPACER 21X29X4.7	5500058303	✓ Current	Read	
<input type="checkbox"/>	...	tsa 24042024-...	KLEBESPACER 21X29X4.7	5500058303	✓ Current	Read	
<input type="checkbox"/>	...	...	...	...	nt	Read	
<input type="checkbox"/>	...	...	...	...	nt	Read	
<input type="checkbox"/>	...	...	...	...	nt	Read	
<input type="checkbox"/>	...	...	...	...	nt	Read	
<input type="checkbox"/>	...	...	...	...	nt	Read	
<input type="checkbox"/>	...	...	...	...	nt	Read	
<input type="checkbox"/>	...	pha20240416b	IMD-F2003090002	pha202400326b	✓ Current	Read	
<input type="checkbox"/>	...	pha20240416a	IMD-F2003090002	pha202400326b	✓ Current	Read	
<input type="checkbox"/>	...	Art 20240412-...	A 20240412 Description	20240412-40	✓ Current	Unrea	
<input type="checkbox"/>	...	Art 20240412-30	A 20240412 Description	20240412-30	✓ Current	Unrea	
<input type="checkbox"/>	...	Art 20240325-...	Article Description 1	20240325	✓ Current	Read	

It is helpful to customize and save **individual search profiles**. By having the search on "Current one of Current", scheduling agreements are not shown if they are outdated

(1) Click on „Advanced Search“

(2) Adjust search criteria

(3) Enter an individual name for your search profile

(4) Click on “Save”

2 applied search criteria

Search

Advanced search

View

Your search profiles

+ Create profile

Search criteria

Full text search

Criterion	Operator	Value
Schedule type	is	(1) Deliver...
Current	is	(1) Current

+ Add criterion

Name of search profile \*

New Profile Name

Mandatory for saving

16 / 30

More Save Apply

Rows per page: Auto 1-12 of 129

## Accessing scheduling lines within a ZLPI to confirm

SupplyOn > Supply Chain Collaboration > Delivery Instructions

**Delivery Instructions**

Download More Search Advanced search View

<input type="checkbox"/>	Material (Cust...)	Material description (Customer)	Order no.	Current	Read	Confirmation status	Customer	Site code (Cus...)	Ship-from site
<input type="checkbox"/>	<a href="#">tsa 24042024-...</a>	KLEBESPACER 21X29X4.7	5500058303	✔ Current	Read	Not to be confirmed	SCM_PD_LE_B_02	_KN_01	
<input type="checkbox"/>	<a href="#">tsa 24042024-...</a>	KLEBESPACER 21X29X4.7	5500058303	✔ Current	Read	Not to be confirmed	SCM_PD_LE_B_02	_KN_01	
<input type="checkbox"/>	<a href="#">tsa 24042024-...</a>			✔ Current	● Unread	Not to be confirmed	SCM_PD_LE_B_02	_KN_01	
<input type="checkbox"/>	<a href="#">tsa 24042024-...</a>			✔ Current	● Unread	Not to be confirmed	SCM_PD_LE_B_02	_KN_01	
<input type="checkbox"/>	<a href="#">tsa 24042024-...</a>			✔ Current	Read	Not to be confirmed	SCM_PD_LE_B_02	_KN_01	
<input type="checkbox"/>	<a href="#">tsa 24042024-...</a>			✔ Current	Read	Not to be confirmed	SCM_PD_LE_B_02	_KN_01	
<input type="checkbox"/>	<a href="#">tsa 24042024-...</a>	KLEBESPACER 21X29X4.7	5500058303	✔ Current	Read	Not to be confirmed	SCM_PD_LE_B_02	_KN_01	
<input type="checkbox"/>	<a href="#">tsa 20240424-...</a>	2305110002 Descr. Cust	31307090467	✔ Current	Read	To be confirmed	SCM_PD_LE_B_02	_KN_01	
<input type="checkbox"/>	<a href="#">Anh-16042024</a>	Caster CASTER, 100MM SWIVE...	55771281/001	✔ Current	Read	Confirmed	SCM_PD_LE_B_01	_DI_01	
<input type="checkbox"/>	<a href="#">pha20240416b</a>	IMD-F2003090002	pha202400326b	✔ Current	Read	Confirmed	SCM_PD_LE_B_02	POR_03	Consignor GmbH & Co
<input type="checkbox"/>	<a href="#">pha20240416a</a>	IMD-F2003090002	pha202400326b	✔ Current	Read	Confirmed	SCM_PD_LE_B_02	POR_03	Consignor GmbH & Co
<input type="checkbox"/>	<a href="#">Anh-15042024C</a>	Caster CASTER, 100MM SWIVE...	5100010471	✔ Current	Read	Confirmed	SCM_PD_LE_B_01	_DI_01	

By clicking on the blue highlighted Material Number, you can access the Delivery Instruction Details

Rows per page: Auto 1-12 of 549

# Overview of scheduling lines and access to confirmation view

SUPPLYON QAS/PrePRO SupplyOn Services News Administration More Log Out

My SupplyOn > Supply Chain Collaboration > Delivery Instruction > Delivery Instruction Details

Contact | Help for this page | Print

**Delivery Instruction Details** Partner Information Additional Information

Material-related Information

Document No.:	03415	Transmission Date:	19.01.23 11:29	Validity Period:	-
Material (Customer):	0380057860000	Material (Supplier):		Planner:	1N2
Material description (Customer):	RK N216-E-TVP2-1031	Message Number:	03415	Supply Model:	Scheduling release order
Engineering Change Level:	00	UoM:	PCE	Order Position:	10
Production Release:	18.06.23	Order Number:	0005360707	Date:	19.01.23
Material Release:	18.07.23	Delivery Instruction Number:	4	Date:	30.08.22
Additional Information:	Index Document: ECV MP000184611 000 Version 00 Begleitedokument(e): EDP RKN216-E-TVP2-1031 001 Version 00 Zielmenge/Target QTY 1.917,000 2022-07-16 - 9999-12-31 SFA: Supply for Availability				
Transport Mode:					

Additional Reference Data

Deliverynote Number:	--	Date:	19.01.23	Quantity:	
Current cumulated quantity received:	0	Start date of current cumulated quantity:	01.01.23	Last cumulated quantity before re...	

Cumulative quantities

Customer:	0	Latest confirmation by:	
Supplier:	0 <input type="button" value="Save"/>	Last response:	
Quantity from ASNs in draft status:	0		
Status:	ok		

Delivery Instruction Schedule Lines [Click here to respond to schedule lines](#)

Default View Manage View

Delivery Date	Pickup Date	Dispatch Qty.	cum. Quantity	Difference	Com
26.03.23		1.200	1.200	1.200	Fix
19.04.23		800	2.000	800	Fix
22.05.23		0	2.000	-1.000	Fix
18.09.23		0	2.000	-1.000	Forec
01.03.24		0	2.000	-1.000	Forec
11.03.24		000	3.000	1.000	Forecast
01.07.24		000	4.000	0	Forecast
01.12.24		000	5.000	0	Forecast
01.06.25		891	5.891	0	Forecast

Back Demand History Download Print

To confirm the scheduling lines, please click on "Click here to respond to schedule lines".

With the new S&OP logic, all components come with a material classification (Supply for Availability, Supply for Series and Supply for Order). Each come with specific fixed horizons, which have been defined in the Industrial Supply Agreement.

## Default view for scheduling lines

SupplyOn > Supply Chain Collaboration > Schedule Response

**Schedule Response**

2

<input type="checkbox"/>	Material (Customer)	Confirmation	Change status	Customer	Requested pickup date	Requested delivery date	Confirmed date	Requested qty.	Confirmed qty.
<input type="checkbox"/>				SCM_PD_LE_B_02		2013/06/30	2013/06/30	1,000 EA	1,000 EA
<input type="checkbox"/>				SCM_PD_LE_B_01		2018/09/09		11 PcE	
<input type="checkbox"/>				SCM_PD_LE_B_01		2018/09/11, 14:39		11 PcE	
<input type="checkbox"/>	A 1809100001			SCM_PD_LE_B_01		2018/09/12, 14:39		10 PcE	
<input type="checkbox"/>	A 1809100001			SCM_PD_LE_B_01		2018/09/13, 14:39		15 PcE	
<input type="checkbox"/>	A 1809100001			SCM_PD_LE_B_01		2018/09/14, 14:39		12 PcE	
<input type="checkbox"/>	A 1809100001			SCM_PD_LE_B_01		2018/09/15		14 PcE	
<input type="checkbox"/>		Required	Initial	SCM_PD_LE_B_01		2018/09/16, 14:39		16 PcE	
<input type="checkbox"/>		Required	Initial	SCM_PD_LE_B_01	2019/02/20, 12:55	2019/02/27		14 PcE	
<input type="checkbox"/>		Re	Initial	SCM_PD_LE_B_01	2019/02/20, 12:55	2019/02/27, 12:55		11 PcE	
<input type="checkbox"/>		Required	Initial	SCM_PD_LE_B_01	2019/02/20, 12:55	2019/02/27, 12:55		15 PcE	

1 You can mark single or multiple lines (1) to use the actions at the top (2)

3 You can open the three-dot menu and perform actions (3)

- 
- 
- 
-

Rows per page: Auto | 1-11 of 177 | < >

## Editing the search profile for easy access to just new and adapted scheduling lines

SupplyOn > Supply Chain Collaboration > Schedule Response

Schedule Response

Edit confirmations Download More Search Advanced search View

	Material (Customer)	Confirmation	Change status	Customer
<input type="checkbox"/>	Article35215	Not required	Initial	SCM_PD_LE_B_02
<input type="checkbox"/>	A 1809100001			
<input type="checkbox"/>	A 1809100001			
<input type="checkbox"/>	A 1809100001			
<input type="checkbox"/>	A 1809100001			
<input type="checkbox"/>	A 1809100001			
<input type="checkbox"/>	A 1809100001			
<input type="checkbox"/>	A 1809100001			
<input type="checkbox"/>	VMI_In2	Required	Initial	SCM_PD_LE_B_01
<input type="checkbox"/>				SCM_PD_LE_B_01
<input type="checkbox"/>				SCM_PD_LE_B_01

Rows per page: Auto 1-11 of 177

**1** Open Advanced Search.

**2** Click on „Create profile“.

**3** Add line and set „Change status is not unchanged“.

**4** Enter individual name.

**5** Click on “Save”

Initially, all scheduling lines have the status “Initial”. **Once confirmed**, scheduling lines are **saved** by SupplyOn and don’t need to be re-confirmed. Therefore, you can **filter out all “Unchanged”** entries using the advanced search.

**Your search profiles**

+ Create profile

**Search criteria**

Full text search

Criterion: Change status Operator: is not Value: (1) Unchan...

+ Add criterion

Name of search profile \* Advanced search 1

Mandatory for saving 17 / 30

More Save Apply

Suggestion



## Customize the view for scheduling lines

SupplyOn > Supply Chain Collaboration > Schedule Response

Schedule Response

Move columns via drag & drop to meet your personal preferences

Suggestion

1 Autosize This Column  
Autosize All Columns  
2 Edit View

3 View

4 Additional view 1

5 Additional view 1

6 Save

Autosize this or all columns (1) and open "Edit View" (2)

(3) Open „Edit View“.  
(4) Create a new profile.  
(5) Arrange visibility and position of columns  
(6) Save your profile

You can also put filters in the columns. Nevertheless, it is recommended to use the search profile instead.

Material (Customer)	Customer	Requested pickup date	Requested delivery date
Article35215	SCM_PD_LE_B_02		2013/06/30
A 1809100001	SCM_PD_LE_B_01		2018/09/09
A 1809100001			
A 1809100001			
A 1809100001			
A 1809100001			
A 1809100001			
VMI_In2	SCM_PD_LE_B_01	2019/02/20, 12:55	2019/02/27
VMI_In2	SCM_PD_LE_B_01	2019/02/20, 12:55	2019/02/27, 12:55
VMI_In2	SCM_PD_LE_B_01	2019/02/20, 12:55	2019/02/27, 12:55

Rows per page: Auto 1-11 of 177

## Agenda

**1** General information about S&OP and ZLPI

**2** **Training focus**

2.1 Overview of SupplyOn

2.2 Assigning required roles

2.3 Accessing scheduling agreements and customizing search and view profiles

**2.4 Confirm scheduling lines with and without deviations**

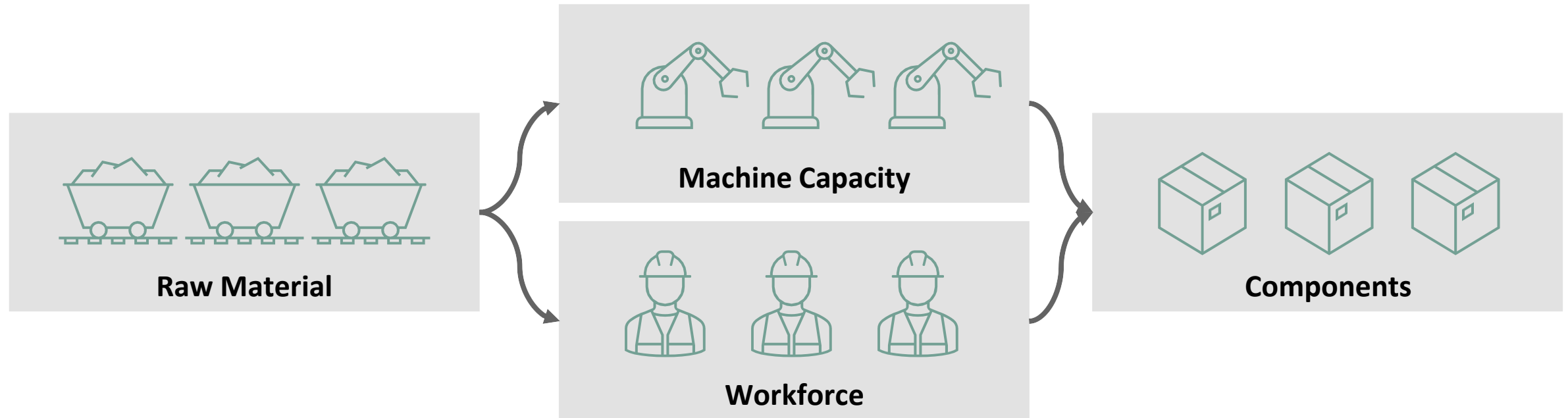
2.5 Download and upload functionality for scheduling agreements

2.6 Adjustment or integration of EDI interfaces

**3** Next steps

### Use case 1: Confirm requested quantities and dates

Enough capacity for the requested quantities and dates



After checking the raw material, machine capacity and workforce, all components (1.200 & 800) can be made in time (26.03.2023 & 19.04.2023).

→ All requested dates and quantities are feasible.

## Case 1: Confirm date and quantity as requested (24)

SupplyOn > Supply Chain Collaboration > Schedule Response

Schedule Response

**2** Edit confirmations Download More 2 rows selected Search Advanced search View

**1** Click on „Edit confirmations“ to enter delivery dates and quantities as requested automatically

Mark the lines that you want to confirm according to the requested date and quantity

	Material (Customer)	Confirmed qty.	Comment	Customer	Requested pickup date	Request delivery
<input type="checkbox"/>	Article35215	1,000 EA	Not required	SCM_PD_LE_B_02	2013/06/30	2013
<input checked="" type="checkbox"/>	A 1809100001		Required	SCM_PD_LE_B_01		2018
<input checked="" type="checkbox"/>	A 1809100001		Required	SCM_PD_LE_B_01		2018
<input type="checkbox"/>	A 1809100001		Required	SCM_PD_LE_B_01		2018
<input type="checkbox"/>	A 1809100001		Required	SCM_PD_LE_B_01		2018
<input type="checkbox"/>	A 1809100001		Required	SCM_PD_LE_B_01		2018
<input type="checkbox"/>	A 1809100001		Required	SCM_PD_LE_B_01		2018
<input type="checkbox"/>	VML_In2		Required	SCM_PD_LE_B_01	2019/02/20, 12:55	2019
<input type="checkbox"/>	VML_In2		Required	SCM_PD_LE_B_01	2019/02/20, 12:55	2019
<input type="checkbox"/>	VML_In2		Required	SCM_PD_LE_B_01		2019

**!** If there are any planned **schedule lines of "0"** in the context of adjustments or cancellations, please **confirm them as well.**

## Case 1: Confirm date and quantity as requested (25)

SupplyOn > Supply Chain Collaboration > Schedule Response

Schedule Response

Edit confirmations Download More 2 rows selected View

	Material (Customer)	Confirmation	Change status	Confirmed date	Confirmed qty.	Comment	Customer	Requested pickup date	Request delivery
<input type="checkbox"/>	Article35215	Not required	Initial	2013/06/30	1,000 EA		SCM_PD_LE_B_02		2013
<input checked="" type="checkbox"/>	A 1809100001	In progress	Initial	2018/09/09	11 PcE		SCM_PD_LE_B_01		2018
<input checked="" type="checkbox"/>	A 1809100001	In progress	Initial	2018/09/11, 14:39	11 PcE		SCM_PD_LE_B_01		2018
<input type="checkbox"/>	A 1809100001	Required	Initial				SCM_PD_LE_B_01		2018
<input type="checkbox"/>	A 1809100001	Required	Initial				SCM_PD_LE_B_01		2018
<input type="checkbox"/>	A 1809100001	Required	Initial				SCM_PD_LE_B_01		2018
<input type="checkbox"/>	A 1809100001	Required	Initial				SCM_PD_LE_B_01		2018
<input type="checkbox"/>	A 1809100001	Required	Initial				SCM_PD_LE_B_01		2018
<input type="checkbox"/>	VMI_In2	Required	Initial				SCM_PD_LE_B_01	2019/02/20, 12:55	2019
<input type="checkbox"/>	VMI_In2	Required	Initial				SCM_PD_LE_B_01	2019/02/20, 12:55	2019
<input type="checkbox"/>	VMI_In2	Required	Initial				SCM_PD_LE_B_01	2019/02/20, 12:55	2019

Afterwards the desired quantities and dates are filled out

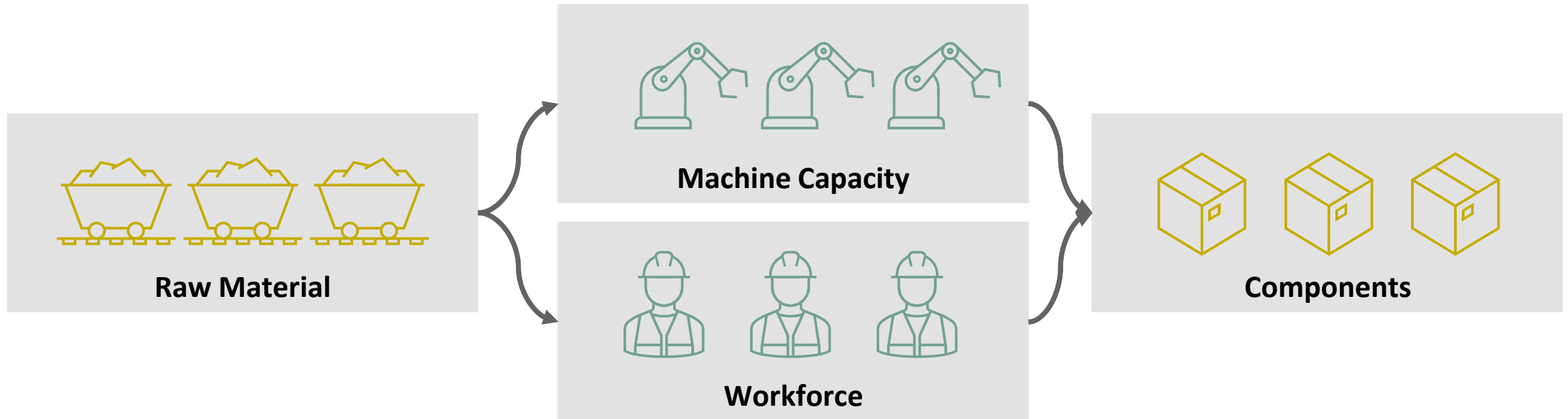
You can also adopt all demands for all lines by checking the top checkbox and afterwards only deviating lines need to be adapted. Please consider: Checking the feasibility of delivery quantities and dates are the same procedure as before. Confirmations are binding for Schaeffler.

Cancel Send confirmations

Rows per page: Auto 1-11 of 177

## Use case 2: Adjustment of delivery date

Delivery needs to be postponed due to late arrival of raw material



The machine capacity and workforce is enough for the requested quantities (1.000), but the raw material will be available too late to fulfill the requested delivery date (11.04.2024).

**→ Requested quantities (1.000) can be made but can only be delivered later than requested (12.04.2024).**



## Case 2: Confirm with deviating date, but requested quantity (27)

SupplyOn > Supply Chain Collaboration > Schedule Response

Schedule Response

1 row selected

	Material (Customer)	Confirmation	Change status
<input type="checkbox"/>	Article35215	Not required	Initial
<input type="checkbox"/>	A 1809		
<input type="checkbox"/>	A 1809		
<input type="checkbox"/>	A 1809		
<input type="checkbox"/>	A 1809		
<input type="checkbox"/>	A 1809		
<input type="checkbox"/>	A 1809		
<input type="checkbox"/>	A 1809		
<input type="checkbox"/>	VML		
<input checked="" type="checkbox"/>	VML_In2	In progress	Initial

(1) Mark the line you want to give a new date.

(2) Click on "Edit confirmations".

(3) Fill in the delivery quantity (if not filled out yet).

(4) Open the calendar.

(5) Mark the new delivery date.

(6) Confirm by clicking "OK".

After clicking „Send confirmations“ the line reflects the new date

You can use the "comment" column to enter a reason for deviations of confirmations.

Customer	Requested pickup date	Request delivery
SCM_PD_LE_B-02		2013
SCM_PD_LE_B-01		2018
SCM_PD_LE_B-01		2018
SCM_PD_LE_B-01		2018
SCM_PD_LE_B-01		2018
SCM_PD_LE_B-01		2018
SCM_PD_LE_B-01		2018
SCM_PD_LE_B-01		2018
SCM_PD_LE_B-01	2019/02/20, 12:55	2019
SCM_PD_LE_B-01	2019/02/20, 12:55	2019
SCM_PD_LE_B-01	2019/02/20, 12:55	2019

2024/04/25, 12:55

Rows per page: Auto 1-11 of 177

## Case 2: Confirm with deviating date, but requested quantity (28)

SupplyOn > Supply Chain Collaboration > Schedule Response

Schedule Response

<input type="checkbox"/>	Material (Customer)	Confirmation	Change status	Customer	Requested delivery date	Confirmed date	Requested qty.	Confirmed qty.	Cumulated deviation
<input type="checkbox"/>	OCE 1903070012								
<input type="checkbox"/>	OCE 1903070012	Not required	Initial	SCM_PD_LE_B_01	2020/10/31, 09:45				
<input type="checkbox"/>	OCE 1903070012	Not required	Initial	SCM_PD_LE_B_01	2020/10/31, 09:45				
<input type="checkbox"/>	OCE 1903070012	Not required	Initial	SCM_PD_LE_B_01	2020/10/31, 09:45				
<input type="checkbox"/>	OCE 1903070012	Not required	Initial	SCM_PD_LE_B_01	2020/10/31, 09:45		7 PCE		! -106
<input type="checkbox"/>	OCE 1903070012	Not required	Initial	SCM_PD_LE_B_01	2020/11/11, 09:45		44 PCE		! -150
<input type="checkbox"/>	OCE 1903070012	Not required	Initial	SCM_PD_LE_B_01	2020/11/13, 09:45		5 PCE		! -155
<input type="checkbox"/>	OCE 1903070012	Not required	-	SCM_PD_LE_B_01		2025/11/13, 09:45		5 PCE	! -150

... You can use the **“comment”** column to enter a **reason for deviations** of confirmations.

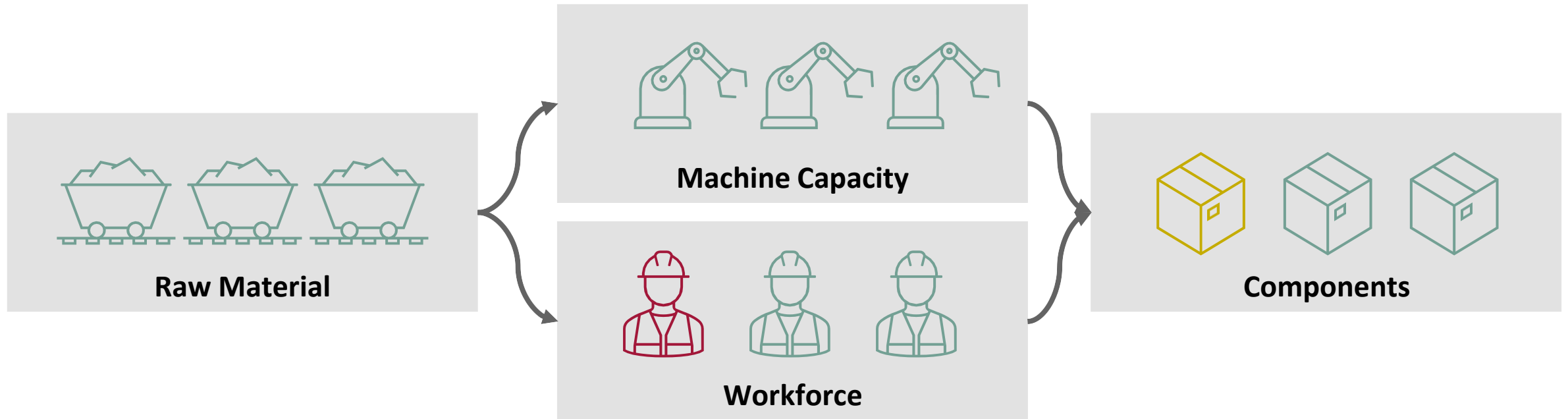
Entering a new delivery date creates a new line with the entered quantity while the original line remains **“unconfirmed”** with no quantity.

While the individual schedule line does not reflect the quantity, in the cumulated quantity the sum is leveled out

Rows per page: Auto 1-8 of 8

### Use case 3: Partial delivery combined with next planned delivery

Worker hands in his notice short-term and needs to be replaced



Even with raw material and machine capacity being available, a worker that has quit can only be replaced a week after the requested date. To compensate, people will work overtime.

→ The requested date (01.07.2024) will be held for a portion of the delivery (800 instead of 1.000).  
The missing parts (200) will be delivered with the following delivery (01.12.2024, 1.200 instead of 1.000).

### Case 3: Confirm with deviating quantity, but requested date (30)

SupplyOn > Supply Chain Collaboration > Schedule Response

**Schedule Response**

1 row selected

	Material (Customer)	Confirmation	Change status	Confirmed date	Confirmed qty.	Comment	Customer	Requested pickup date	Reques delivery
<input type="checkbox"/>	Article35215	Not required	Initial	2013/06/30	10 EA		SCM_PD_LE_B_02		2013
<input type="checkbox"/>	A 1809100001	Required	Initial				SCM_PD_LE_B_01		2018
<input type="checkbox"/>	A 1809100001	Required	Initial				SCM_PD_LE_B_01		2018
<input type="checkbox"/>	A 1809100001	Required	Initial				SCM_PD_LE_B_01		2018
<input type="checkbox"/>	A 1809100001	Required	Initial				SCM_PD_LE_B_01		2018
<input type="checkbox"/>	A 1809100001	Required	Initial				SCM_PD_LE_B_01		2018
<input type="checkbox"/>	A 1809100001	Required	Initial				SCM_PD_LE_B_01		2018
<input checked="" type="checkbox"/>	VML_In2	In progress	Initial	2019/02/27	10 PcE		SCM_PD_LE_B_01	2019/02/20, 12:55	2019
<input type="checkbox"/>	VML_In2	Not required	Initial				SCM_PD_LE_B_01	2019/02/20, 12:55	2019
<input type="checkbox"/>	VML_In2	Not required	Initial				SCM_PD_LE_B_01		2019

(1) Mark the line you want to give a new quantity  
 (2) Click on "Edit confirmations"  
 (3) Fill in the delivery quantity

After clicking „Send confirmations“ the line reflects the new quantity

! If the deviation is accepted by a scheduler of Schaeffler, the ZLPI will be adapted, and scheduling lines might change and must be re-confirmed by the supplier.

### Case 3: Confirm with deviating quantity, but requested date (31)

SupplyOn > Supply Chain Collaboration > Schedule Response

#### Schedule Response

<input type="checkbox"/>	Material (Customer)	Confirmation	Change status	Customer	Requested delivery date	Confirmed date	Requested qty.	Confirmed qty.	Cumulated deviation
	Art 20240429-10								
<input type="checkbox"/> ...	Art 20240429-10	Not required	Initial	SCM_PD_LE_B_01	2024/05/01	2024/05/01	100 EA	10 EA	! -90
<input type="checkbox"/> ...	Art 20240429-10	Not required	-	SCM_PD_LE_B_01		2024/05/02		90 EA	0

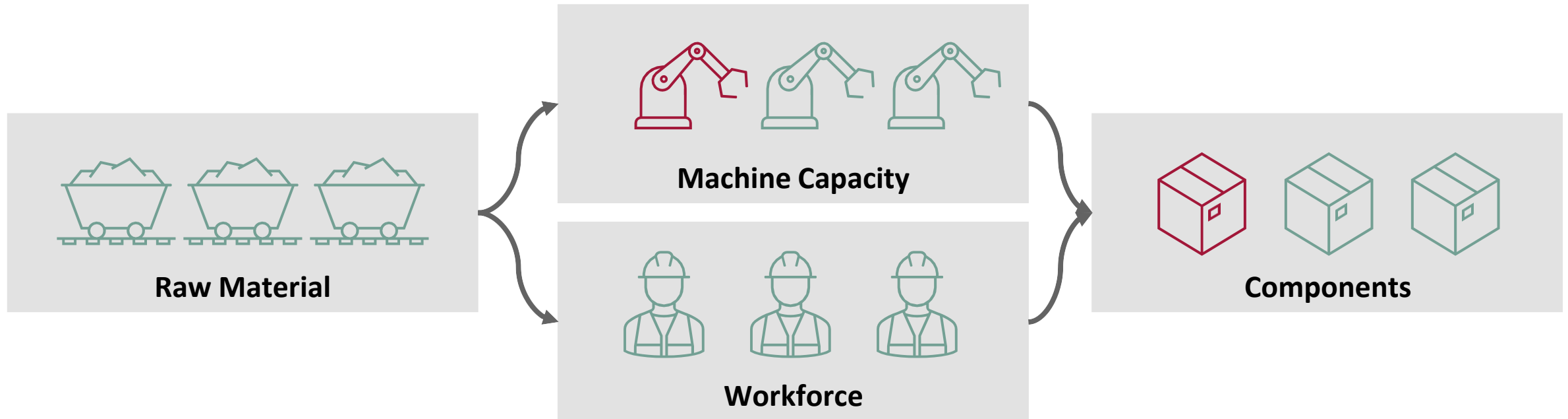
If the deviation is accepted by a scheduler of Schaeffler, the ZLPI will be adapted, and scheduling lines might change and must be re-confirmed by the supplier.

By entering a lower quantity first and a higher quantity for the following planned delivery, the cumulated quantity is leveled out

Rows per page: Auto 1-2 of 2

### Use case 4: Partial delivery with extra delivery

Machine capacity is not ready for a peak in demand



While raw material and workforce can be organized for a peak in demand (891), but the machine capacity can not be increased in time to enable the required date (01.06.2025).

→ **The requested demand needs to be smoothed out over a period and therefore is split into multiple deliveries towards Schaeffler (500 on 01.06.2025 & 391 on 02.06.2025).**

## Case 4: Confirm with split scheduling lines (33)

SupplyOn > Supply Chain Collaboration > Schedule Response

### Schedule Response

<input type="checkbox"/>	Material (Customer)	Confirmation	Change status	Confirmed date	Confirmed qty.	Comment	Customer	Requested pickup date	Request delivery
<input type="checkbox"/>	Article35215	Not required	Initial	2013/06/30	10 EA		SCM_PD_LE_B_02		2013
<b>1</b> <input type="checkbox"/>	...						SCM_PD_LE_B_01		2018
<input type="checkbox"/>	...						SCM_PD_LE_B_01		2018
<input type="checkbox"/>	...	Required	Initial				SCM_PD_LE_B_01		2018
<input type="checkbox"/>	...	Required	Initial				SCM_PD_LE_B_01		2018
<input type="checkbox"/>	...	Required	Initial				SCM_PD_LE_B_01		2018
<input type="checkbox"/>	...	Required	Initial				SCM_PD_LE_B_01		2018
<input type="checkbox"/>	...	Required	Initial				SCM_PD_LE_B_01		2018
<input type="checkbox"/>	VML_In2	Not required	Initial				SCM_PD_LE_B_01	2019/02/20, 12:55	2019
<input type="checkbox"/>	VML_In2	Not required	Initial				SCM_PD_LE_B_01	2019/02/20, 12:55	2019
<input type="checkbox"/>	VML_In2	Not required	Initial				SCM_PD_LE_B_01	2019/02/20, 12:55	2019

Click on the three dots (1) and then click on "Split delivery" (2).

- Edit confirmations
- Split delivery**
- Clear confirmations
- Download Schedule Responses >

Rows per page: Auto 1-11 of 178

## Case 4: Confirm with split scheduling lines (2/2)

SupplyOn > Supply Chain Collaboration > Schedule Response

### Schedule Response

2 rows selected

	Material (Customer)	Confirmation	Change status	Confirmed date	Confirmed qty.	Comment	Customer	Requested pickup date	Request delivery
<input type="checkbox"/>	Article35215	Not required	Initial	2013/06/30	10 EA		SCM_PD_LE_B_02		2013
<input type="checkbox"/>	A 1809100001	Required	Initial				SCM_PD_LE_B_01		2018
<input checked="" type="checkbox"/>	A 1809100001	In progress	Initial	2018/09/11, 14:39	11 PcE		SCM_PD_LE_B_01		2018
<input checked="" type="checkbox"/>	A 1809100001	In progress	-	2018/09/12, 14:39			SCM_PD_LE_B_01		2018
<input type="checkbox"/>	A 1809100001	Required	Initial				SCM_PD_LE_B_01		2018
<input type="checkbox"/>	A 1809100001	Required	Initial				SCM_PD_LE_B_01		2018
<input type="checkbox"/>	A 1809100001	Required	Initial				SCM_PD_LE_B_01		2018
<input type="checkbox"/>	A 1809100001	Required	Initial				SCM_PD_LE_B_01		2018
<input type="checkbox"/>	A 1809100001	Required	Initial				SCM_PD_LE_B_01		2018
<input type="checkbox"/>	VMI_In2	Not required	Initial				SCM_PD_LE_B_01	2019/02/20, 12:55	2019
<input type="checkbox"/>	VMI_In2	Not required	Initial				SCM_PD_LE_B_01	2019/02/20, 12:55	2019

There you can enter the delivery dates and quantities to meet the request

Rows per page: Auto | 1-11 of 179 | << < > >>



## Save and send confirmations

SupplyOn > Supply Chain Collaboration > Schedule Response

Schedule Response

Edit confirmations Download More 1 row selected View

	Material (Customer)	Confirmation	Change status	Confirmed date	Confirmed qty.	Comment	Customer	Requested pickup date	Request delivery
<input checked="" type="checkbox"/>	Article35215	In progress	Initial	2013/06/30	10 EA		SCM_PD_LE_B_02		2013
<input type="checkbox"/>	A 1809100001	Required	Initial				SCM_PD_LE_B_01		2018
<input type="checkbox"/>	A 1809100001	Required	Initial				SCM_PD_LE_B_01		2018
<input type="checkbox"/>	A 1809100001	Required	Initial				SCM_PD_LE_B_01		2018
<input type="checkbox"/>	A 1809100001	Required	Initial				SCM_PD_LE_B_01		2018
<input type="checkbox"/>	A 1809100001	Required	Initial				SCM_PD_LE_B_01		2018
<input type="checkbox"/>	A 1809100001	Required	Initial				SCM_PD_LE_B_01		2018
<input type="checkbox"/>	A 1809100001	Required	Initial				SCM_PD_LE_B_01		2018
<input type="checkbox"/>	VMI_In2								2019
<input type="checkbox"/>	VMI_In2								2019
<input type="checkbox"/>	VMI_In2								2019

Cancel Send confirmations

Rows per page: Auto 1-11 of 178

Mark all lines (1) and click on "Edit confirmations" (2). Then click on "Send confirmations" (3)

**Please note:** By clicking on "send confirmations" you instantly send your confirmation to Schaeffler SAP. You can still come back and continue or change confirmations if required afterwards

## Status of scheduling agreement ZLPI now has changed!

SupplyOn > Supply Chain Collaboration > Scheduling Agreements

Scheduling Agreements    Scheduling Agreement line items

Edit confirmations    Download    More    1 applied search criterion    Search    **Advanced search**    View

<input type="checkbox"/>	Order	Order status	Confirmation	Read	Customer	Customer site	Order date	Order type	Material	Total price
<input type="checkbox"/>	20221028-190	Completely confirmed	Not required	Read	SCM_PD_LE_B...	SCM_PD_CP_B__PO...				10,025.
<input type="checkbox"/>	20221028-180	Completely confirmed	Not required	Read	SCM_PD_LE_B...	SCM_PD_CP_B__PO...				10,025.
<input type="checkbox"/>	20221028-160	Completely confirmed	Not required	Read	SCM_PD_LE_B...	SCM_PD_CP_B__PO_01	2022/10/28	Scheduling agree...	20221028-160	10,025.
<input type="checkbox"/>	20221028-150	Completely confirmed	Not required	Read	SCM_PD_LE_B...	SCM_PD_CP_B__PO_01	2022/10/28	Scheduling agree...	20221028-150	10,025.
<input type="checkbox"/>	20221028-140	Completely confirmed	Not required	Read	SCM_PD_LE_B...	SCM_PD_CP_B__PO_01	2022/10/28	Scheduling agree...	20221028-140	10,025.
<input type="checkbox"/>	20221025-90	Completely confirmed	Not required	Read	SCM_PD_LE_B...	SCM_PD_CP_B__PO_01	2022/10/25	Scheduling agree...	20221025-90	10,025.
<input type="checkbox"/>	20221025-70	Completely confirmed	Not required	Read	SCM_PD_LE_B...	SCM_PD_CP_B__PO_01	2022/10/25	Scheduling agree...	20221025-70	10,025.
<input type="checkbox"/>	20221025-60	Initial	Required	Read	SCM_PD_LE_B...	SCM_PD_CP_B__PO_01	2022/10/25	Scheduling agree...	20221025-60	10,025.
<input type="checkbox"/>	20221025-50	Initial	Required	Read	SCM_PD_LE_B...	SCM_PD_CP_B__PO_01	2022/10/25	Scheduling agree...	20221025-50	10,025.
<input type="checkbox"/>	20221025-40	Completely confirmed	Not required	Read	SCM_PD_LE_B...	SCM_PD_CP_B__PO_01	2022/10/25	Scheduling agree...	20221025-40	10,025.
<input type="checkbox"/>	20221025-10	Completely confirmed	Not required	Read	SCM_PD_LE_B...	SCM_PD_CP_B__PO_01				10,025.
<input type="checkbox"/>	ON-TSA-2022101	Partially confirmed	Required	Read	SCM_PD_LE_B...	SCM_PD_CP_B_POR_03				10,025.

**Remember to adjust your search profile to see also scheduling agreements that have been opened.**

**After all scheduling lines are confirmed, the "Order status" changes to "Completely confirmed"**

**Please note:** If you have the search profile restricted to "'Read' is 'New'" you won't be able to see and re-enter the scheduling agreement!

## Agenda

**1** General information about S&OP and ZLPI

**2** **Training focus**

2.1 Overview of SupplyOn

2.2 Assigning required roles

2.3 Accessing scheduling agreements and customizing search and view profiles

2.4 Confirm scheduling lines with and without deviations

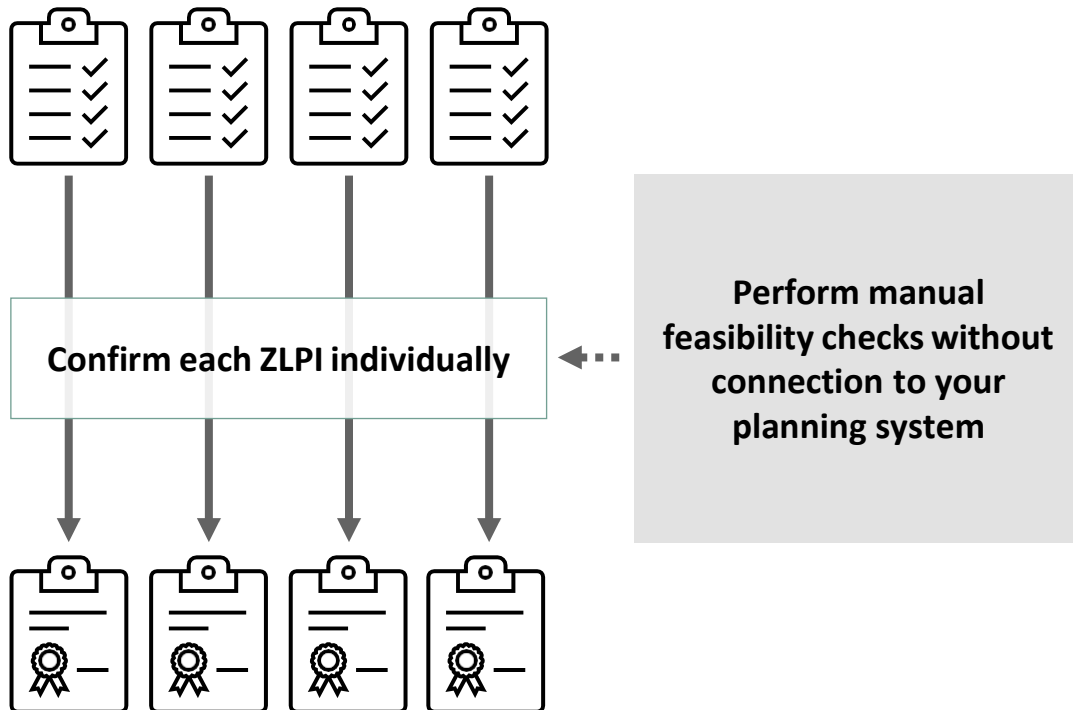
**2.5 Download and upload functionality for scheduling agreements**

2.6 Adjustment or integration of EDI interfaces

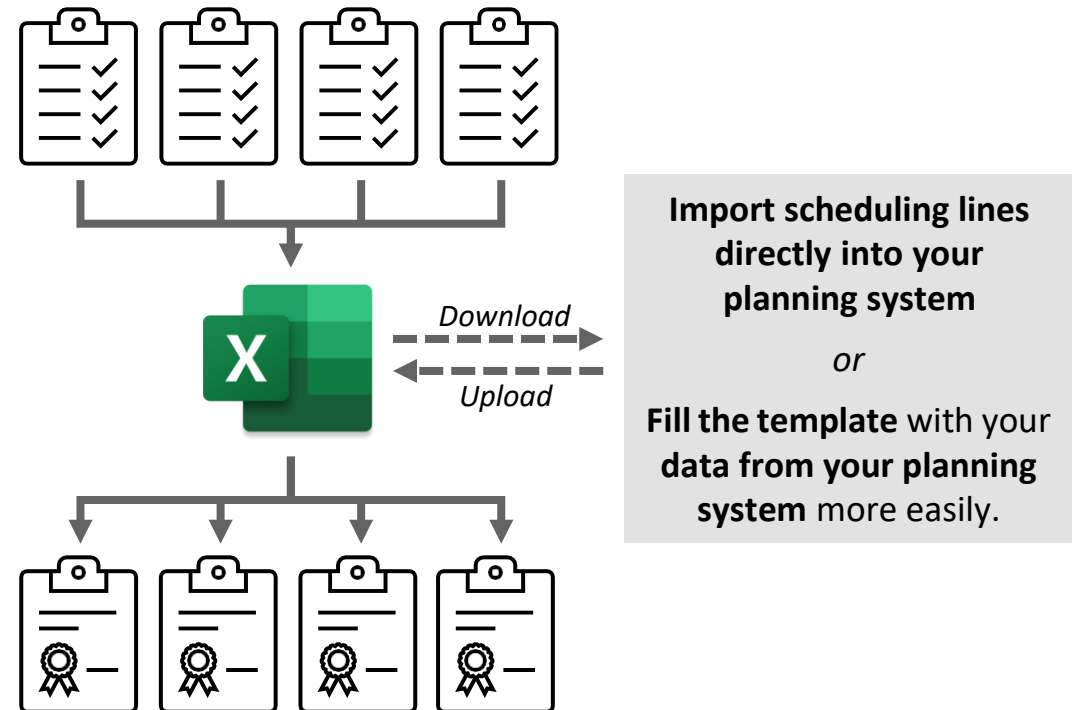
**3** Next steps

## Interface of SupplyOn to download and upload scheduling agreements

### Confirming each ZLPI one by one...



### ... or download multiple ZLPIs to process the data in your system.



# Download scheduling agreements

## Alternative 1: Direct access via Schedule Responses

The screenshot shows the SUPPLYON SupplyOn Services dashboard. The left sidebar contains a navigation menu with the following items: Dashboard, Demand (Orders, Scheduling Agreements, Delivery Instructions 1, Delivery Forecasts, JIT Call-offs, Kanban), Schedule Responses (highlighted with a green box and callout), Planning, Delivery, Monitoring, and Invoicing. Below the menu are 'Settings & Master Data' and 'Help for this page' with a 'back' button. The main dashboard area displays a grid of cards for various metrics:

- Orders:** 0 Total New Orders & Updates. Order Status: New Orders (0), Order Updates (0).
- Delivery Instructions:** 1 Current new Delivery Instructions.
- Delivery Forecasts:** 0 Current new Delivery Forecasts.
- JIT Call-Offs:** 0 Current new JIT Call-Offs.
- Confirmable Orders:** 0 Total Confirmable Orders. Order Status: Dated (0).
- Alerts:** 19 Total New Alerts. Type: Inventory Alerts (0).
- eInvoicing:** 0 Total Billable Items. Billable Item Status: Billable Items Due (0).
- Advance Shipping Notice:** 79 ASN Creation Due, 4 Pending ASN. Due Deliveries: Overdue (79).

## Download scheduling agreements

### Alternative 1: Direct access via Schedule Responses

SupplyOn > Supply Chain Collaboration > Schedule Response

#### Schedule Response

**Edit confirmations** | **Download** | **More** | 178 rows selected | Search | **Advanced search** | **View**

**1** [checkbox] Material (Custom) | **Download Schedule Responses** > | **2** [checkbox] **Default Profile XLS** | **06/30** | **10 EA**

**Default Profile CSV**  
**Default Profile XLS**  
Configure downloads

**You can use your search profile to control the selection for download**

**To download the schedule lines select all the lines (1) you want to download and click on "Default XLS" (2)**

Material (Custom)	Confirmed date	Confirmed qty.	Comment	Customer	Requested pickup date	Request delivery
Article35215	06/30	10 EA		SCM_PD...		2018
A 1809100001				SCM_PD...		2018
VMI_In2				SCM_PD...	2019/02/20, 12:55	2019
VMI_In2				SCM_PD...		2019
VMI_In2				SCM_PD...		2019

**! If possible, please use the XLS' format as it is easier to use. You can also configure your own template.**

Rows per page: Auto | 1-11 of 178 | < > >>

## Download scheduling agreements

### Alternative 2: Select individual scheduling agreements and customize the search criteria.

SupplyOn > Supply Chain Collaboration > Schedule Response

Schedule Response

Edit confirmations Download More 178 rows selected Search Advanced search View

Download Schedule Responses >

- Default Profile CSV
- Default Profile XLS
- Configure downloads

Material (Custom)	Confirmed date	Confirmed qty.	Comment	Customer	Requested pickup date	Request delivery
Article35215	06/30	10 EA				2013
1809100001						2018
1809100001						2018
VMI_In2				SCM_PD_LE_B_01		2018
VMI_In2				SCM_PD_LE_B_01		2018
VMI_In2				SCM_PD_LE_B_01	2019/02/20, 12:55	2019
A 1809100001				SCM_PD_LE_B_01		2019
A 1809100001				SCM_PD_LE_B_01		2019
VMI_In2				SCM_PD_LE_B_01		2019

To download the schedule lines select all the lines (1) you want to download and click on "Default XLS" (2)

**Please note:** By choosing a less restrictive search profile, you can also combine multiple materials or scheduling agreements to download and check them at the same time

If possible, please use the XLS' format as it is easier to use. You can also configure your own template.

Rows per page: Auto 1-11 of 178

## Download Excel file with scheduling lines

The screenshot shows the SupplyOn interface for 'Schedule Response'. At the top, there is a navigation bar with 'SupplyOn Services', 'Administration', and 'News'. Below this, a breadcrumb trail reads 'SupplyOn > Supply Chain Collaboration > Schedule Response'. The main content area features a 'Schedule Response' header with buttons for 'Edit confirmations', 'Download', and 'More'. A status indicator shows '11 rows selected'. Below the buttons is a table with columns: Material (Customer), Confirmation, Change status, Confirmed date, Confirmed qty., Comment, Customer, Requested pickup date, and Requested delivery. The table contains 11 rows of data, including materials like 'Article35215', 'A 1809100001', and 'VMI\_In2'. A blue alert box at the top right contains the message: 'Download started in the background. File will be provided once finished.' A callout box points to the 'Comment' column with the text: 'SupplyOn shows you an alert that your file is being compiled and will be ready to download.' Another callout box points to the 'Comment' column with the text: 'After completion, you can download and open the template to transfer to your system or fill it out.' At the bottom right, there is a pagination control showing 'Rows per page: Auto' and '1-11 of 178'.

	Material (Customer)	Confirmation	Change status	Confirmed date	Confirmed qty.	Comment	Customer	Requested pickup date	Requested delivery
<input checked="" type="checkbox"/>	Article35215	Not required	Initial	2013/06/30			SCM_PD_LE_B_02		2013
<input checked="" type="checkbox"/>	A 1809100001	Required	Initial				SCM_PD_LE_B_01		2018
<input checked="" type="checkbox"/>	A 1809100001	Required	Initial				SCM_PD_LE_B_01		2018
<input checked="" type="checkbox"/>	A 1809100001	Required	Initial				SCM_PD_LE_B_01		2018
<input checked="" type="checkbox"/>	A 1809100001	Required	Initial				SCM_PD_LE_B_01		2018
<input checked="" type="checkbox"/>	A 1809100001	Required	Initial				SCM_PD_LE_B_01		2018
<input checked="" type="checkbox"/>	A 1809100001	Required	Initial				SCM_PD_LE_B_01		2018
<input checked="" type="checkbox"/>	A 1809100001	Required	Initial				SCM_PD_LE_B_01		2018
<input checked="" type="checkbox"/>	VMI_In2	Not required	Initial				SCM_PD_LE_B_01	2019/02/20, 12:55	2019
<input checked="" type="checkbox"/>	VMI_In2	Not required	Initial				SCM_PD_LE_B_01	2019/02/20, 12:55	2019
<input checked="" type="checkbox"/>	VMI_In2	Not required	Initial				SCM_PD_LE_B_01	2019/02/20, 12:55	2019



## Overview of the Excel template

The screenshot shows an Excel spreadsheet with the following columns: Buyer Org. Code, Plant Code, Supplier No., Order Type, Order Number, Order Position, Article Number, Confirmed Qty. Pos., Comment Position, Original Date Sched. Line, Confirmed Date Sched. Line, Original Qty. Sched. Line, Confirmed Qty. Sched. Line, Comment Sched. Line, Original Sched. Line ID, Confirmed Sched. Line ID, Original Sched. Line Commit, Conf. Number, Project Id, Supplier Reference, and Status. The 'Confirmed Date Sched. Line' and 'Confirmed Qty. Sched. Line' columns are highlighted in green. A callout box at the bottom right contains the following text:

**Please note:** You must fill out at least the “Confirmed Date Sched. Line” and “Confirmed Qty. Sched. Line”. You must fill in “0”, if that is required.

## Upload the Excel template in SupplyOn (44/3)

SupplyOn > Supply Chain Collaboration > Schedule Response

### Schedule Response

[Edit confirmations](#) [Download](#) [More](#) 1 row selected  [Advanced search](#) [View](#)

	Material (Customer)	Confirmation	Confirmed date	Confirmed qty.	Comment	Customer	Requested pickup date	Request delivery
<input type="checkbox"/>	Article35215	Not required	Initial			SCM_PD_LE_B_02		2013
<input checked="" type="checkbox"/>	A 1809100001	Required	Initial	10 EA		SCM_PD_LE_B_01		2018
<input type="checkbox"/>	A 1809100001	Required	Initial			SCM_PD_LE_B_01		2018
<input type="checkbox"/>	A 1809100001					SCM_PD_LE_B_01		2018
<input type="checkbox"/>	A 1809100001					SCM_PD_LE_B_01		2018
<input type="checkbox"/>	A 1809100001					SCM_PD_LE_B_01		2018
<input type="checkbox"/>	A 1809100001	Required	Initial			SCM_PD_LE_B_01		2018
<input type="checkbox"/>	VMI_In2	Not required	Initial			SCM_PD_LE_B_01	2019/02/20, 12:55	2019
<input type="checkbox"/>	VMI_In2	Not required	Initial			SCM_PD_LE_B_01	2019/02/20, 12:55	2019
<input type="checkbox"/>	VMI_In2	Not required	Initial			SCM_PD_LE_B_01	2019/02/20, 12:55	2019

Rows per page: Auto 1-11 of 178

**After checking the schedule lines for feasibility and filling the template with delivery dates and quantities, you can upload them to SupplyOn**

## Upload the Excel template in SupplyOn (45/3)

The screenshot shows the 'Upload Schedule Responses' dialog in the SupplyOn application. The dialog has a blue header and a white body. It contains a 'Drag and Drop or Browse' area with a cloud icon and a 'Browse' button. Below this, it lists 'Supported File Types: XLSX'. At the bottom, there are 'Close' and 'Upload' buttons. A callout box with a pointer to the 'Browse' button contains the following instructions:

- (1) Click on „Browse“.
- (2) Navigate to Excel file.
- (3) Click „Open“.
- (4) Click on „Upload“

The background shows the 'Schedule Response' page with a table of items. The table has columns for item ID, status, and date. The 'Upload' button is highlighted with a green circle and the number 4. The 'Browse' button is highlighted with a green circle and the number 1. A Windows file explorer window is open over the dialog, showing the 'Downloads' folder. The file 'ScheduleResponse\_Overview\_SupplyOn\_\_SupplyOn\_20240425\_132207.xlsx' is selected and highlighted with a green circle and the number 2. The 'Open' button in the file explorer is highlighted with a green circle and the number 3.

## Upload the Excel template in SupplyOn (46/3)

SupplyOn > Supply Chain Collaboration > Schedule Response

Schedule Response

SCM\_PD\_LE\_S\_01 - von Myra Nikolaus

Successfully uploaded file

Wait for SupplyOn to proceed the Excel template. Once done, the alert will tell you about the success of the upload.

	Material (Customer)	Confirmation	Change status	Customer	Requested delivery date	Confirmed date	Requested qty.	Confirmed qty.	Cumulated deviation
<input type="checkbox"/>	Art 20240429-20								
<input type="checkbox"/> ...	Art 20240429-20	Not required	Initial	SCM_PD_LE_B.01	2024/05/01	2024/05/01	100 EA	100 EA	0

According to the input, the delivery dates and quantities will be filled out

**Please note:** When using the upload-function, you **don't need to click on "Send confirmations"** to transmit your confirmation to Schaeffler.

Rows per page: Auto 1-1 of 1

## Agenda

**1** General information about S&OP and ZLPI

**2** **Training focus**

2.1 Overview of SupplyOn

2.2 Assigning required roles

2.3 Accessing scheduling agreements and customizing search and view profiles

2.4 Confirm scheduling lines with and without deviations

2.5 Download and upload functionality for scheduling agreements

**2.6 Adjustment or integration of EDI interfaces**

**3** Next steps

## Adapting existing EDI interface or new integration

### → Ordering via SupplyOn web-store

If you want to confirm ZLPI scheduling agreements via an EDI interface, you can order the necessary packages via the [SupplyOn web-store](#).



### Demand Forecast Response

Basic Service Package with limited included service time for Inbound message type

- Agree on service tasks, dates and team
- Message configuration on SupplyOn EDI system
- SupplyOn provides for some message types and customers a self-service test tool to validate message structure for e.g. Invoice or ASN. Per inbound message type one test coupon is included. Each coupon is valid for 90 days (starting from the first test). SupplyOn supports manual error analyses after successful syntax test.
- Alternatively support to meet required SupplyOn and customer data quality level
- Test support for defined use cases
- Go-Live and stabilization phase support
- Handover to SupplyOn operations team
- Language: English (French or German may be offered in some cases)
- Exchange via ticket system or e-mail

#### Your Connection

Your Customer \*

Schaeffler Technologies AG & Co. KG

Application \*

Supply-Chain-Collaboration (SCC)

Message Protocol \*

EDIFACT

Quantity

1

Service time included

7,50h

#### Procedure:

1. Go to the web-store and log in.
2. Search for the package “Demand Forecast Response” to be able to confirm ZLPI delivery agreements.\*
3. Enter “Schaeffler Technologies AG & Co. KG” as customer and purchase the package.

#### Notice:

“Demand Forecast Response” is necessary for confirming delivery schedules. Existing processes, such as the processing of “Purchase Orders”, are not affected by this. Corresponding packages are still to be used.



**Please note:** If you have not yet adjusted your EDI interface at the time of sending the **Warm-Up-ZLPI**, we still ask you to **confirm** the delivery agreement **via SupplyOn's WebEDI service** as described in this document!

\*) Direct product link: [Demand Forecast Response](#)

Training focus/Adjustment or integration of EDI interfaces

## For further training material and support also go to our SupplyOn Information portal for Schaeffler production material suppliers

The screenshot shows the SupplyOn Information portal. At the top left is the 'SUPPLYON' logo. At the top right are a grid icon, 'English', and a 'Login' button. The main header area has a blue background with the text 'Welcome to the Information portal for Schaeffler production material suppliers'. Below this is a navigation sidebar on the left with icons for Overview, SupplyOn Solutions, Registration at SupplyOn, Supplier Information Management, EDI Integration, and Support. The main content area features a paragraph: 'The Schaeffler strategy intends to permanently improve and digitize business processes and make them even more efficient. SupplyOn provides efficient communication solutions for Schaeffler and its partners since 2003. The integration by electronically business processes of logistics, purchasing and quality, creates transparency and accelerates the procedures. **Your company registration is needed to fulfill the requirements of all Schaeffler production material branches.**' To the right of this text is the 'SCHAEFFLER' logo. Below the text are five cards: 'SupplyOn Solutions' (Solutions at a glance), 'Registration at SupplyOn' (SupplyOn registration step by step), 'Supplier Information Management' (Maintenance of supplier information and documents), 'EDI Integration' (Direct integration in your internal systems via EDI connection), and 'Support' (Help & Support at SupplyOn). Each card has a 'More' button at the bottom.



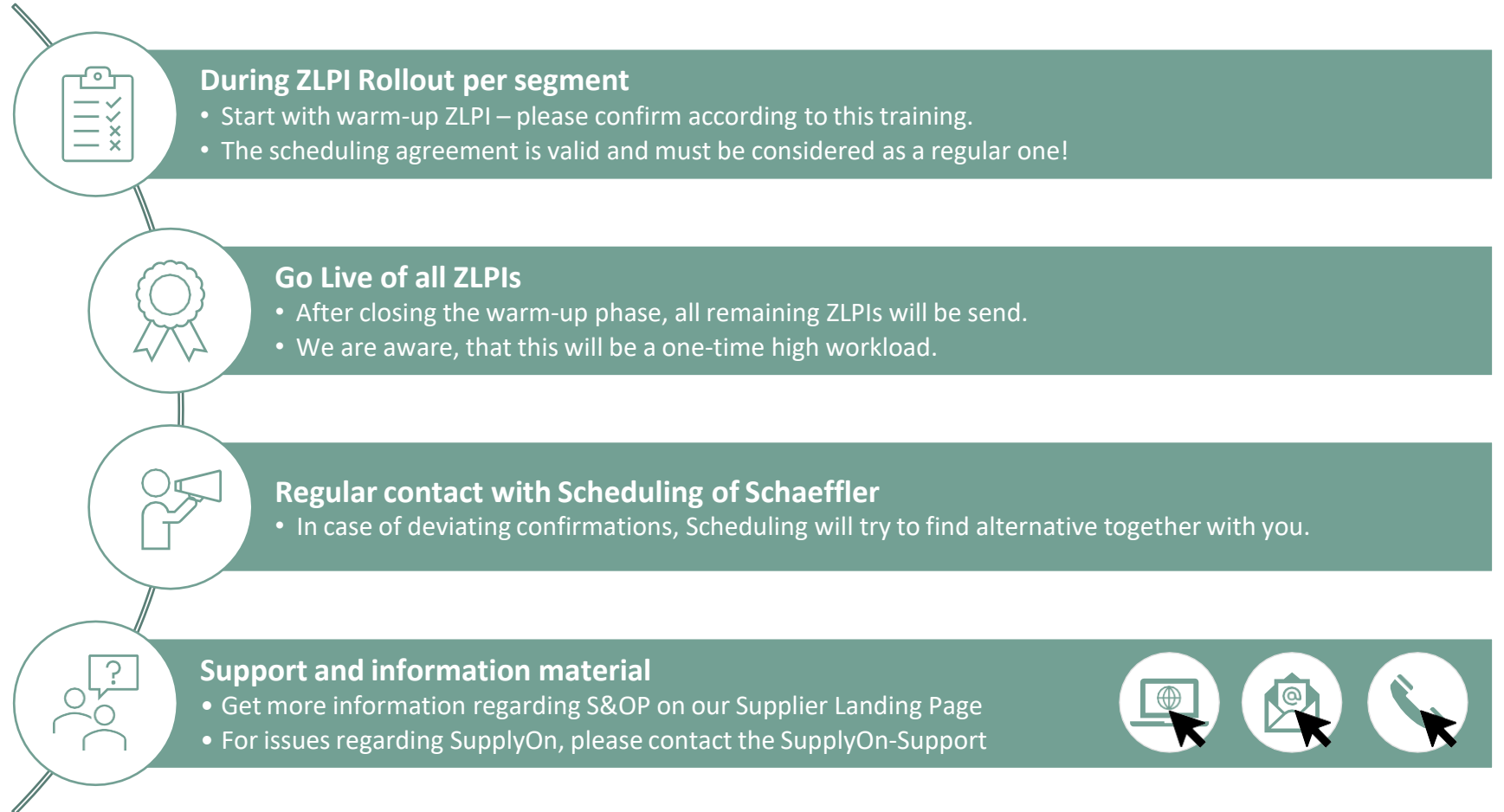
[Infoportal | Schaeffler \(supplyon.com\)](https://supplyon.com)

## Agenda

- 1 General information about S&OP and ZLPI
- 2 Training focus
- 3 Next steps**



## Next steps



**Thank you!**

