Schneider Electric

Training documentation for suppliers

Delivery Forecast

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1 About this manual

This handout shall help suppliers of Schneider Electric (SE) to understand newly introduced supplier portal, SSP SCM 2.0, in regards to the weekly Forecast process which will be handled with the SupplyOn Delivery Forecast module (FC).

1.1 Intended Audience

Suppliers of Schneider Electric

1.2 Typographical and Graphical Conventions

The following typographical conventions are used throughout this manual:

Example	Meaning
Screen Text	Text visible in the user interface becomes **bold**.
Reference	References are displayed in *italics.*

The graphical convention is used throughout the manual:

Figure: Red borders are used to indicate special areas. Red numbers are used to indicate steps. Those are not part of the UI.

2 Introduction

A FC is usually sent once per week in a rolling process and includes Forecast Schedule lines according to your customers MRP run. Forecast Schedule are provided for forecast purposes only and don't need to be delivered short-term.

How do you benefit from the new FC process via SupplyOn WebEDI?

- All processes run via a central cockpit, offering a complete overview at any time as well as a single view on the specific status of any process individually

- Clear overview about planned demands and transparency of changes

- Simple download of demand data for further internal use

3 Setup in SupplyOn WebEDI

3.1 Roles and Rights

In order to use the FC process in SupplyOn WebEDI you need a user account with appropriate roles and rights.

You can check the current setup of your user account via **Administration** > **My User Account** directly on the SupplyOn platform.
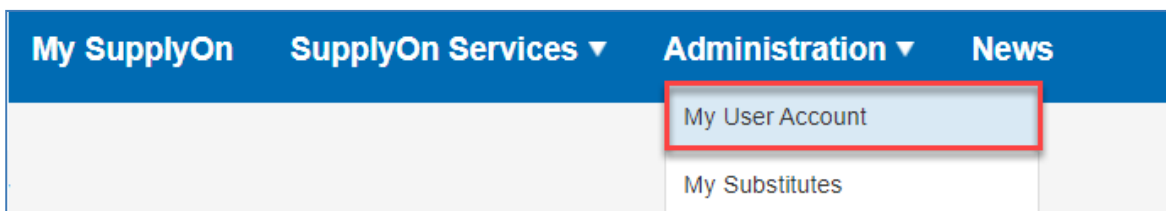

Figure 1: Selection of My User Account

First you can check basic information like your language settings, your phone number or your mail address. If needed, the existing information can be adapted in this section.
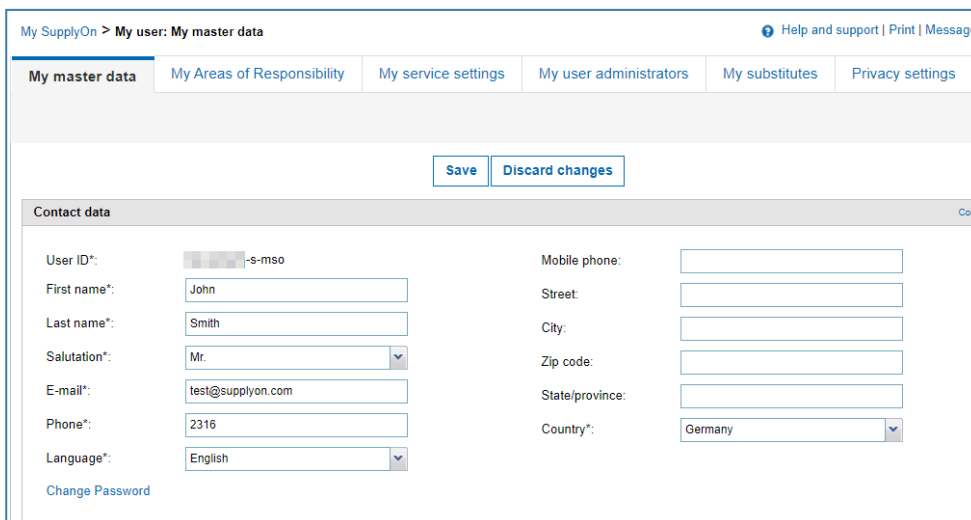

Figure 2: My User Account overview

Under the tab **My Areas of Responsibility** you can see for which processes in SupplyOn WebEDI your user account is enabled.
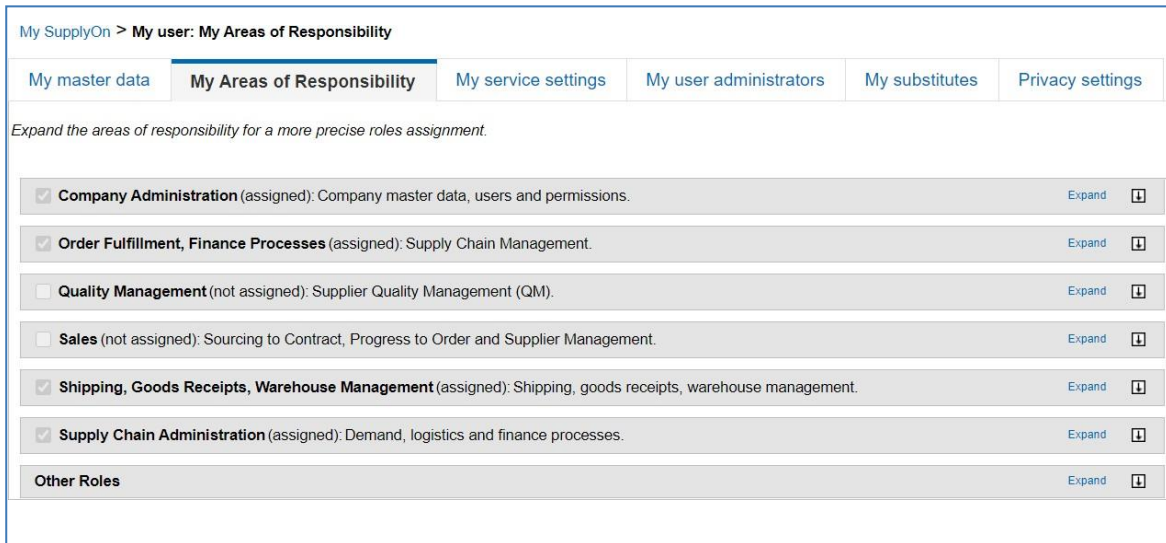

Figure 3: Areas of responsibility

Which areas of responsibility you get activated and which user roles you receive is in responsibility of your internal administrator. Only your internal administrator is capable of creating users or assign additional roles and rights.

To be able to commit the actions of this guide, at least the following roles in the areas of responsibility (marked in grey) are required:

Order Fulfillment, Finance Processes:

- **WebEDISellerReleases:** Access to delivery instructions and delivery instruction confirmations or delivery instruction acknowledge receipts.
- **WebEDISellerDTM:** Access to DTM UI for configuration of upload and download profiles.

Supply Chain Administration:

- **WebEDISellerAdmin:** Extensive authorities over SupplyOn WebEDI and various, unlocked applications

At least one of the users of your Company should have the Admin right.

Note

By clicking on **Administration** > **My user administrators** you can figure out your responsible CompanyAdmins.
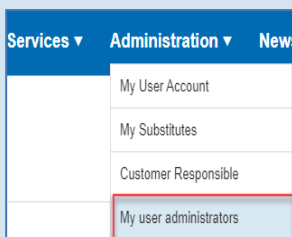
3.2 Dashboard

WebEDI / VMI is the SupplyOn service, which enables you review demand data and to process Advanced Shipping Notifications, orders and other services efficiently and easily.

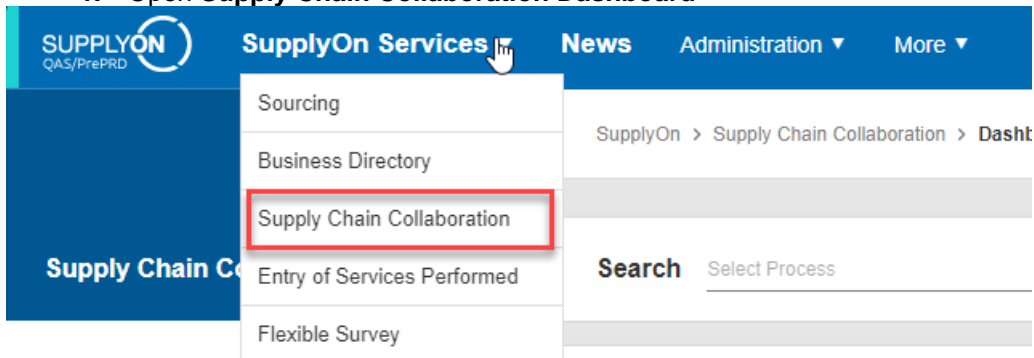1. Open **Supply Chain Collaboration Dashboard**

Figure 4 : Access Supply Chain Collaboration

2. The **Logistic & Finance** Dashboard is displayed
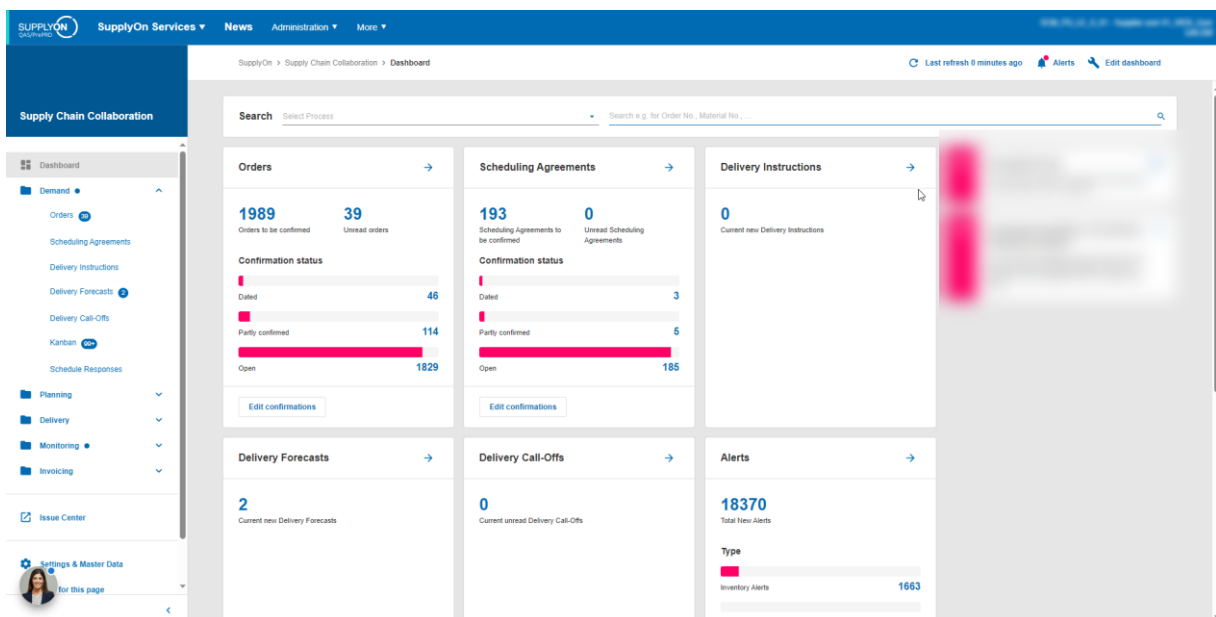

Figure 5 : Supply Chain Collaboration Dashboard

The Dashboard shows at a glance all relevant information for you and is the central entry point for all processes you need to work with. Open tasks for you are displayed in the according tile of a process. The tiles of the different processes are only displayed if the related user rights have been assigned to your account.

The dedicated tile for the Delivery Forecast process contains the information about how many new Forecast message are available for your user.

> **Note**
>
> By clicking on **Interactive Tour** on the lower left side of the dashboard, you will be guided through the User Interface (UI). At initial login this will be opened automatically as a pop up.

3.3 Creating default views

In SupplyOn Supply Chain Collaboration it is possible to customize the various screens according to the user's needs to display only relevant data. This is applicable e.g. for the Delivery Forecast overview screen, but also for several other screens.

After clicking on the **View** button **(1)**, you are able to:

- "Drag & drop" the **=** symbol of a column to change its position. **(2)**
- Make a column visible/invisible by clicking on the **eye** icon. **(3)**
- Pin a column to the left side of the overview by clicking on the **pin** icon. **(4)**
- Save your view by clicking on the **Save** button. **(5)**
- You can also create a new profile under a different name if you do not want to override your default profile settings. **(6)**

Figure 6 : Delivery Forecast Overview screen

3.4 Creating Search Profiles

Next to the customization of tables, as described in the previous chapter, it also possible to define search profiles to get only specific content displayed in the Delivery Forecast overview table.

To set up a search profile, select **Advanced Search (1)** above the Delivery Forecast overview table. You can select the available search criteria from the dropdown list. To apply further criteria to your search click **Add criterion (2)**.

The defined search can be saved as personalized search profile. Enter a name of your choice **(3)** and confirm with **Save (4).**
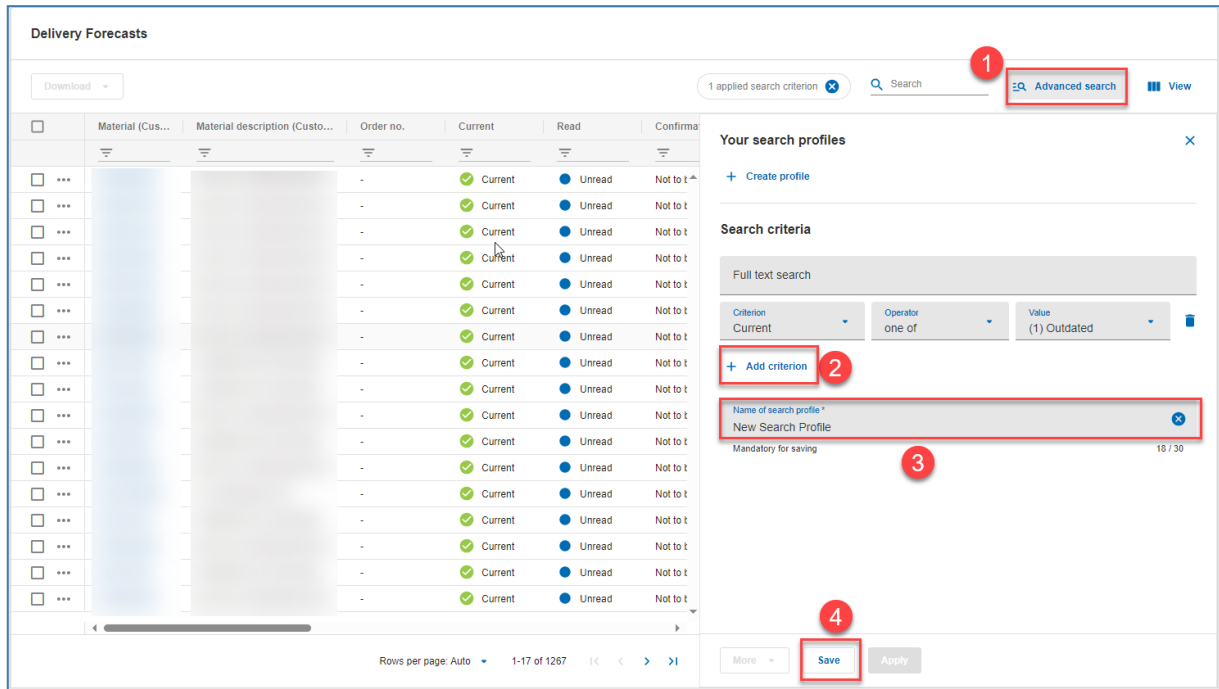
Figure 7: Create a search profile

3.5 Creation of Download profile

The following chapter shows how you can define your own download template for Forecast information in case you would like to focus on specific information for your download.

To specify your customized download format, open the **Download Profiles** in the **Settings and Master Data** tile of the **Logistic & Finance Dashboard.**
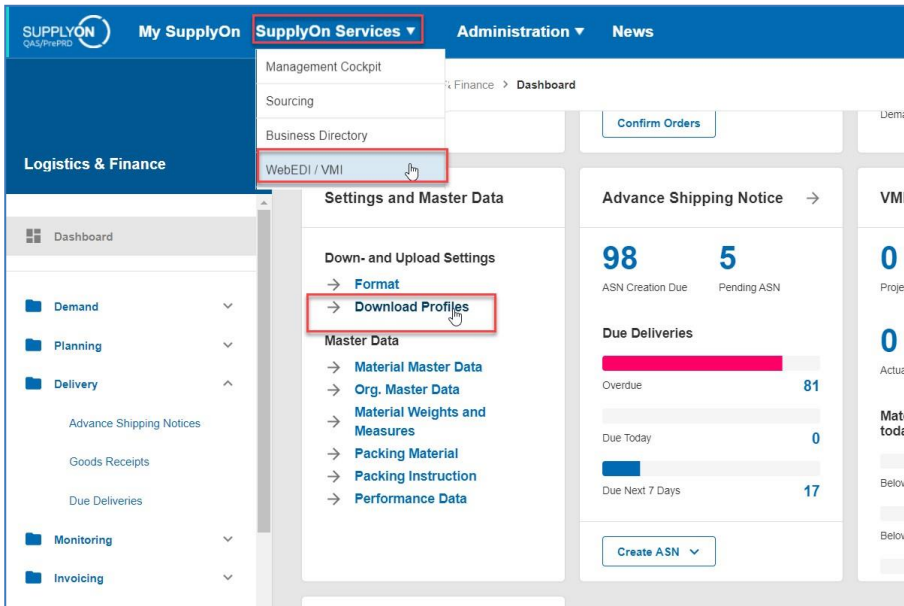

Figure 8: Settings and Master Data tile

You are automatically directed to the tab **DTM Profiles**, where you can create a customized FC download profile with the following steps:

1 Select **Delivery Schedules** in the Process dropdown
2 Press **Duplicate**
3 Define a name for the profile (e.g. Weekly Forecast)
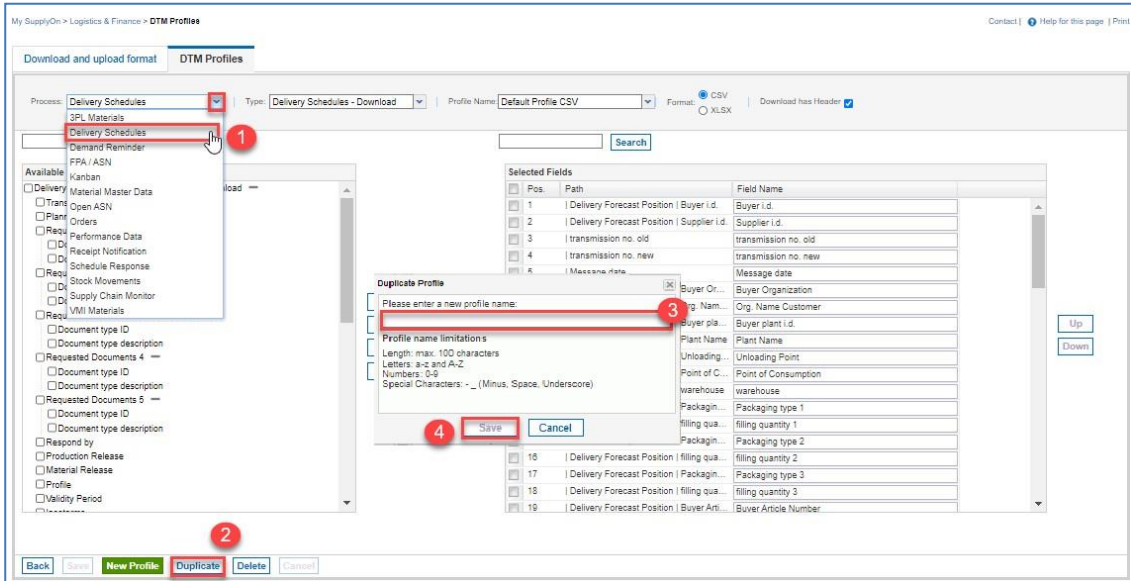4 Confirm with **Save**

Figure 9: Creation of download profile for the FC process

Define which FC fields should be included in your customized Profile:

1. Search for the FC field in the **Available Fields** section and tick the box
2. **Add selected** field to the **Selected Fields** section
3. Select Fields in the **Selected Fields** section which are not required
4. **Remove selected** to exclude them from your profile
5. Rename the Field Name, if needed
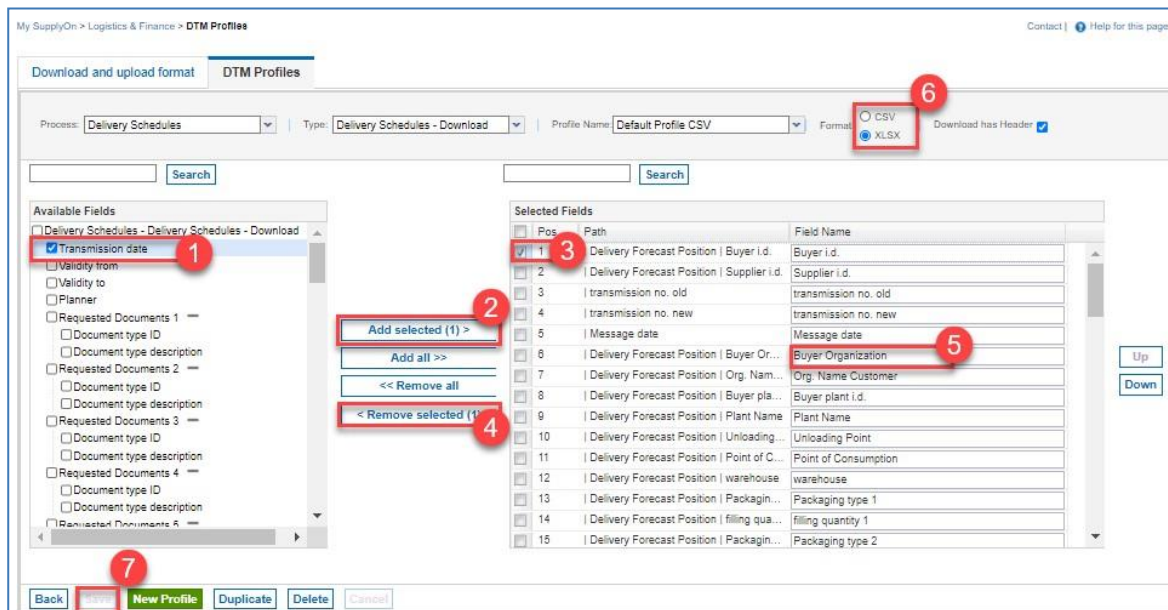6. Change the **format** of your download file to **XLSX**
7. **Save** your changes

Figure 10: Specification of download profile for the FC process

4 Review Forecast Demands

A FC is usually sent once per week in a rolling process and includes Forecast Schedule lines according to your customers MRP planning. Forecast Schedule are provided for forecast purposes only and don't need to be delivered short-term. In the following chapter you will learn how to access the process in SupplyOn and how to review the details.

4.1 Access Delivery Forecast Overview

Via the **Supply Chain Collaboration Dashboard** you have different possibilities to access the DeliveryForecast information provided by you customer:

1. You can access via **Delivery Forecast** via the navigation

2. You can access via the arrow in the **Delivery Forecast** tile

3. You can access via the counter of **new Delivery Forecasts** to only review messages that you have not yet read.
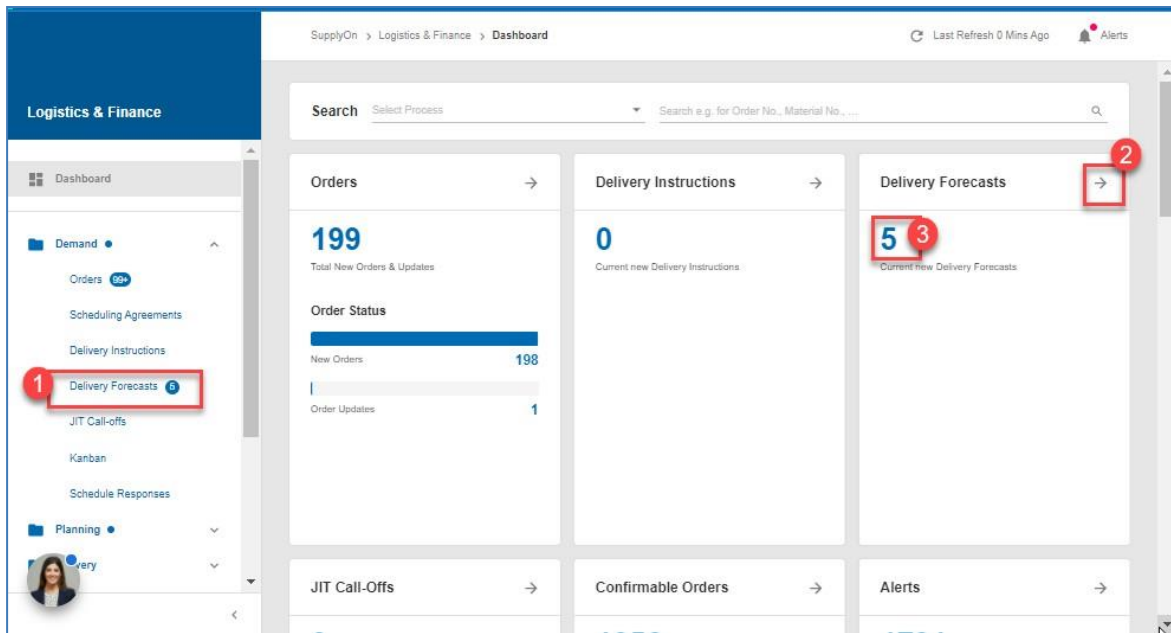
Figure 11: Access to Delivery Forecast Overview

A default filter on column **Current** ensures that only latest forecast data are displayed. However, by excluding the filter also Forecast data of the past are available. Not yet reviewed Forecast data are indicated in column **Read** with **Unread**.

In this screen you can access the Delivery Forecast Details screen by clicking on the blue **Material** number:

Figure 12: Access Delivery Forecast details

You can also perform following actions by selecting one or several rows **(1)**:

- Click on the **Download** button (2) and then **Download PDF document** to generate a PDF document in **Details** or **Overview** format (3).
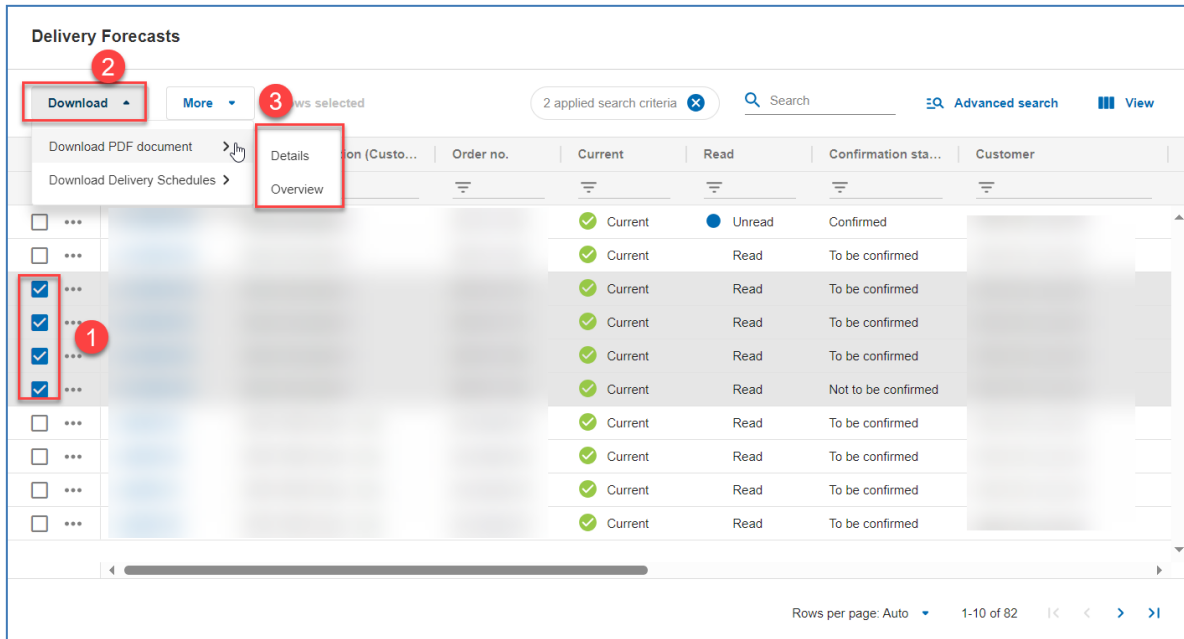

Figure 13: Download in PDF format

- You can also download the select Delivery Forecasts as CSV file:
  First click on the **Download** button **(1),** then click on **Download Delivery Schedules (2).** The recommended option here is the **Default profile CSV**.
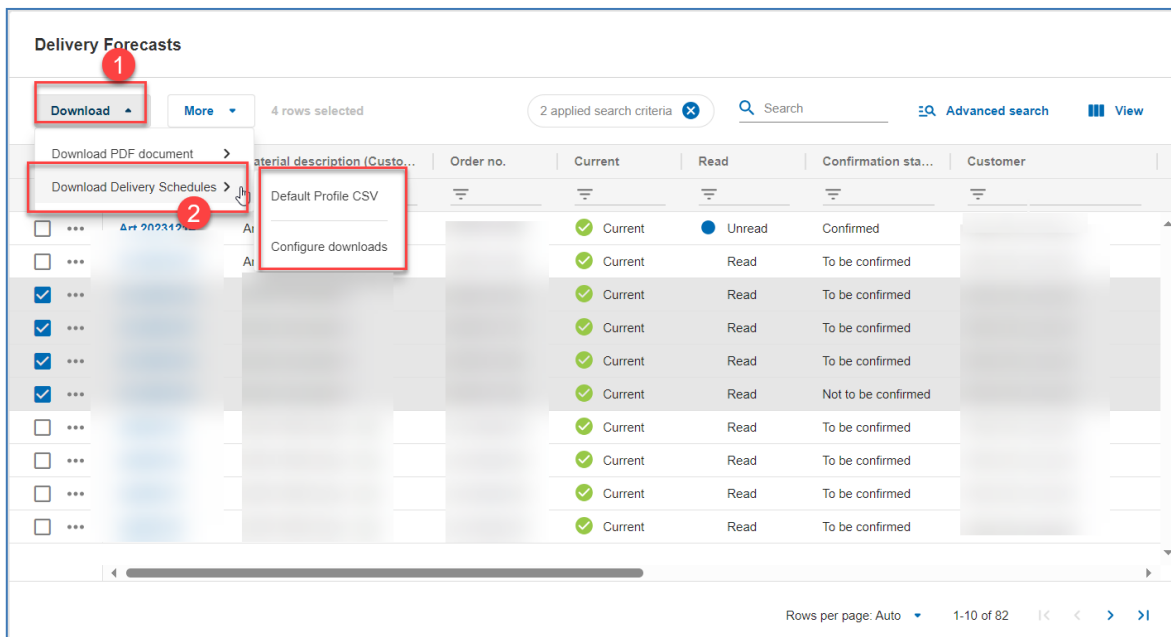

Figure 14: Download in CSV format

- Delivery Forecasts are automatically set to **Read** once they have been opened or downloaded. You can also mark the selected entries as **Read** or **Unread**.
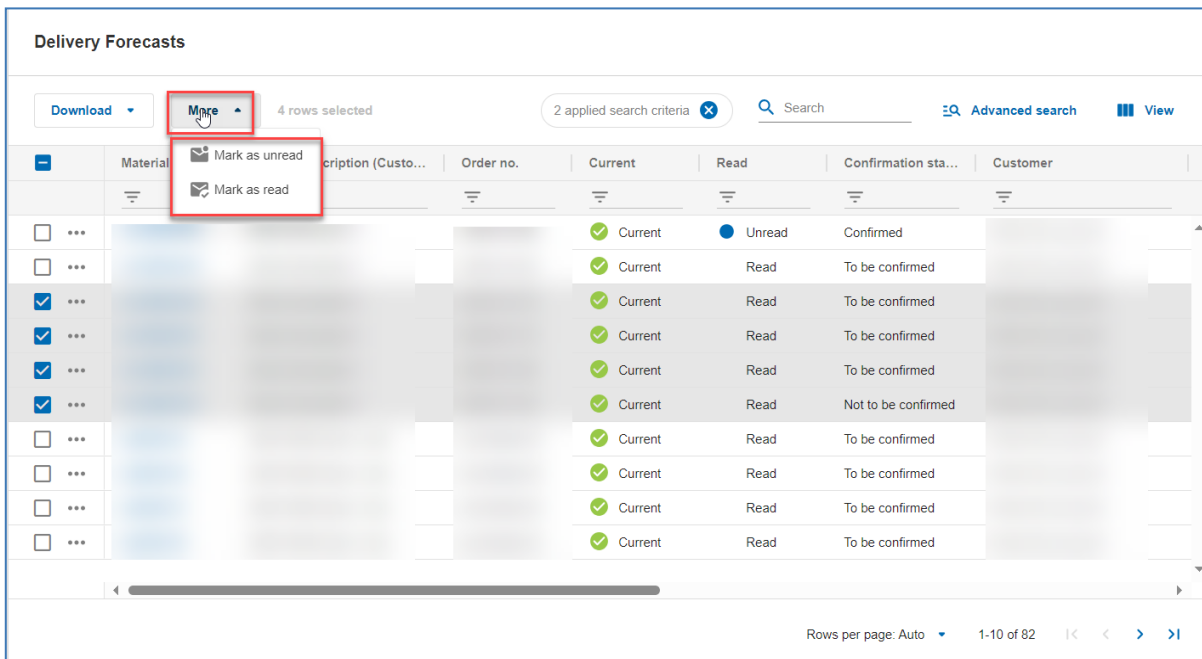

Figure 15: Mark Delivery Forecasts as read or unread

Note

The screen is prefiltered for Schedule Type = Delivery Forecast. Excluding this filter wouldalso display other demand processes like Delivery Instruction, in case data are available.

4.2 Review Forecast details

In the details of one material following information can be review:

- Material related information and transmission data of the document (1)
- Planned Delivery schedules (not yet ordered) (2)

4.3 Download Forecast data

Planned delivery schedules can also be downloaded from the overview screen for several materials, or in the details screen for one material.

The download file includes one line per planned delivery schedules.

See chapter 3.5. to learn how to define you own download format.

5 FAQs and SupplyOn Contact

> ➢ **Forgot password?**

You can get a new password at any time.
Therefore you need your user ID and your e-mail address.
You get an e-mail including a link you have to click within the next 24 hours.
Subsequently you get directed to a website to specify your new password.
You can start the process here.

> ➢ **Forgot User ID?**

You can get notified about your user ID at any time.
Therefore you need your first and last name and your e-mail address.
You will receive an e-mail with your current user ID.
Important:
The e-mail address, first and last name have to be stored at SupplyOn.
Your spam filter must not block the e-mail.

Get your user ID here.

Further frequently asked questions can be read here.

E-mail address for productive issues: https://contact.supplyon.com/en/

- Worldwide support in 9 languages (English, German, French, Spanish, Portuguese, Italian, Chinese, Japanese and Korean)
- 365 days/24 hours available