![pitney bowes logo]

# SNC –Guide for Suppliers to Pitney Bowes

## This document includes the following:

**Section-1:** *User Settings and Navigation*
**Section-2:** *Purchase Order Worklist*
**Section-3:** *Due-List for Purchasing Documents*
**Section-4:** *ASN Creation*
**Section-5:** *Invoice Creation*
**Section-6:** *SMI- Supplier Managed Inventory*
**Section-7:** *Scheduling Agreement Overview*
**Section-8:** *Alert Monitor Settings*
**Section-9:** *Product Data (Vendor's Part-Number)*
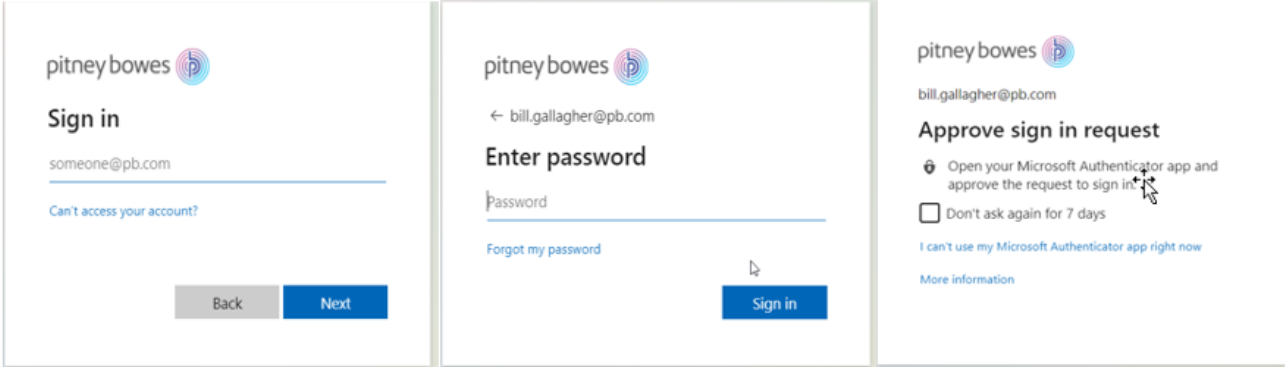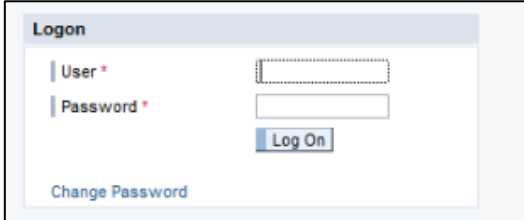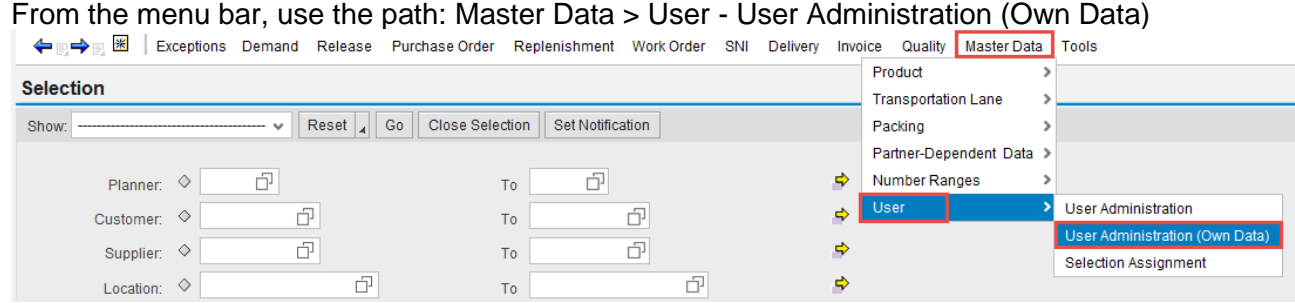                *Report Settings*
                *Download/Upload Center*

# Section-1

# SNC – User Settings and Navigation

✓ **Objective: Objective: User Settings.** This section shows how to set personal settings such as email, decimal notations, and date format.
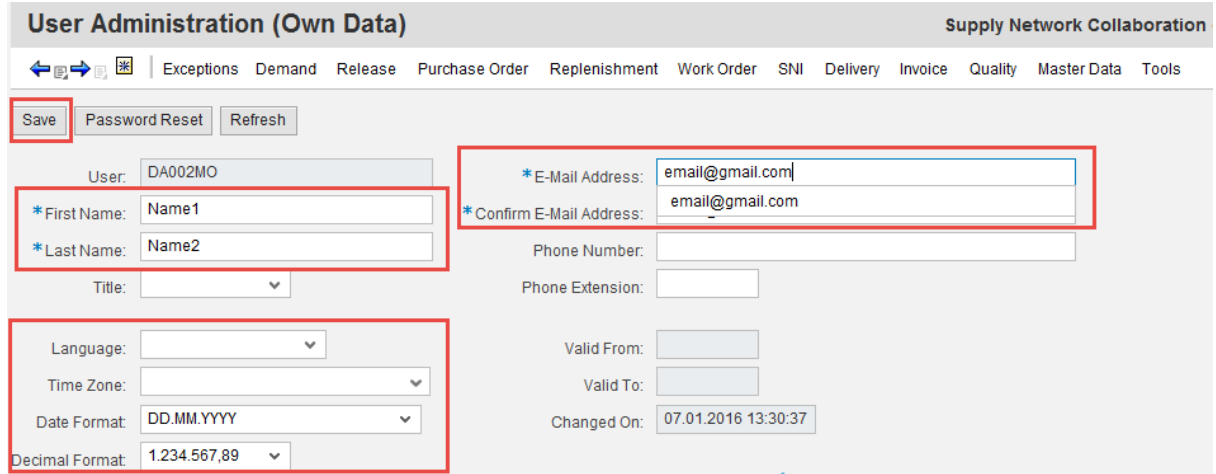
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![pitney bowes logo]

## Logon/Settings/Navigation – Overview

This job aid provides an overview of default settings and system navigation

| Step | Description |
|------|-------------|
| 1 | Go to www.pb.com> *Our Company > Supplier Connect > Supplier Collaboration*<br>SNC is now MFA enabled.  You must receive a authorization code to login.<br><br><br><br>Then enter Username and Password. Click **Log On.**<br>*(If prompted to logon to SAP or Active-Directory, ALWAYS logon to SAP)*<br><br> |
| 2 | **When first logging onto the system follow the below steps to update your personal data and preferences. (This step generally only needs to be done once).**<br><br>From the menu bar, use the path: Master Data > User - User Administration (Own Data)<br><br> |

Pitney Bowes logo

**Date and Decimal formats can be maintained on this view.**
Name, Email address, phone number, Language, and Time Zone can also be maintained here.
Click on Save when done.
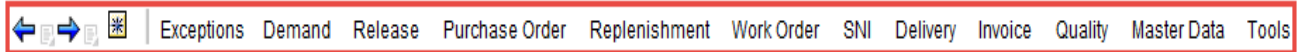


3

**System Navigation;**

**Main Menu**

- Overview decription of main-menu listed below. Detail instruction of how to access and use each area are described in other sections of this document.



- **Exceptions**: Alert Monitor reporting area
- **Demand:** Not Used
- **Release**: Schedule Agreements Details
- **Purchase Order**: Purchase Orders Confirmations and Details
- **Replenishment**: Forecast, Demands
- **Work Order:** Not Used
- **SNI:** Not Used
- **Delivery**: Due List open-order report
- **Invoice**: Invoice History
- **Quality**: Not Used
- **Master Data**: User settings, Partner Product Data (Vendor Part numbers)
- **Tools**: Upload/Download Functionality

**End Of User Settings and Navigation**

# Section-2

# SNC – Purchase Order Worklist
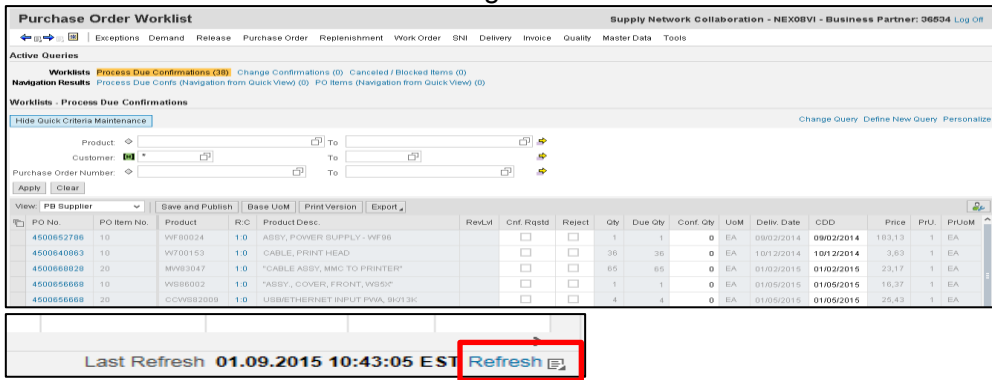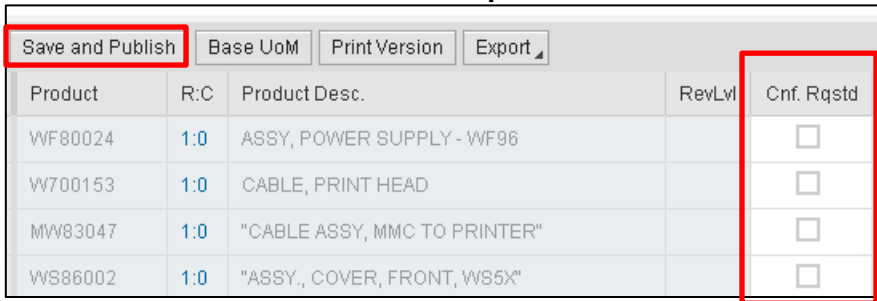
**Objective: Process and Manage Purchase Orders / Scheduling Agreements via PO Worklist.**

## SNC Purchase Order Worklist – Overview

This job aid provides an overview of the Purchase Order Worklist within SNC.  Pitney Bowes and suppliers can use the queries of the purchase order worklist to list purchase order items according to specific criteria. In the results list of a query, query-specific functions are available that the supplier or customer can use to complete their tasks.  In the supplier view, the supplier can select purchase order items that have not yet been (completely) confirmed. In the results list of the query, the supplier can create, change, and publish purchase order confirmations, or reject purchase order items.

## Purchase Order Worklist

The following are the steps involved in managing the Purchase Order Worklist:

| Step | Description |
|------|-------------|
| 1 | From the menu bar, use the path *Purchase Order>Purchase Order Worklist*<br>• Click on **Refresh** on bottom right of screen<br><br>![Purchase Order Worklist screenshot] |
| 2 | • PO Items can be filtered by entering selection criteria<br>• PO Items can be confirmed as requested by:<br>  o Check the box **Cnf. Rqstd**. > then click **Save and Publish**.<br><br>![Save and Publish screenshot] |

| 3 | To change delivery quantiles/dates, do the following; |
|---|---|

- Quantity can be changed by entering new quantity in **Conf. Qty** field.
- Delivery Date can be changed by entering new date in **CDD** field.



- If **Price** needs to be updated, please contact the Pitney Bowes Commodity Manager.
- *Optional: SO number (from supplier's system) can be entered in **SO No.** which can be used to tie Pitney Bowes PO with the supplier's SO.*
- Item Category:  Normal = Ship to PB, TPOP = Drop Ship
- Ship-To Loc:
    - If this field has a number (i.e 1001, 3001, 4001) the code is referring to a PB plant location
    - If the Ship-to location is blank, this indicated the order is Drop Ship
    - To view ship-to address click on PO Number> On next screen click on Locations
        - Ship-to address will display

| 4 | The following are the steps involved in splitting the PO Items into schedule lines: |
|---|---|
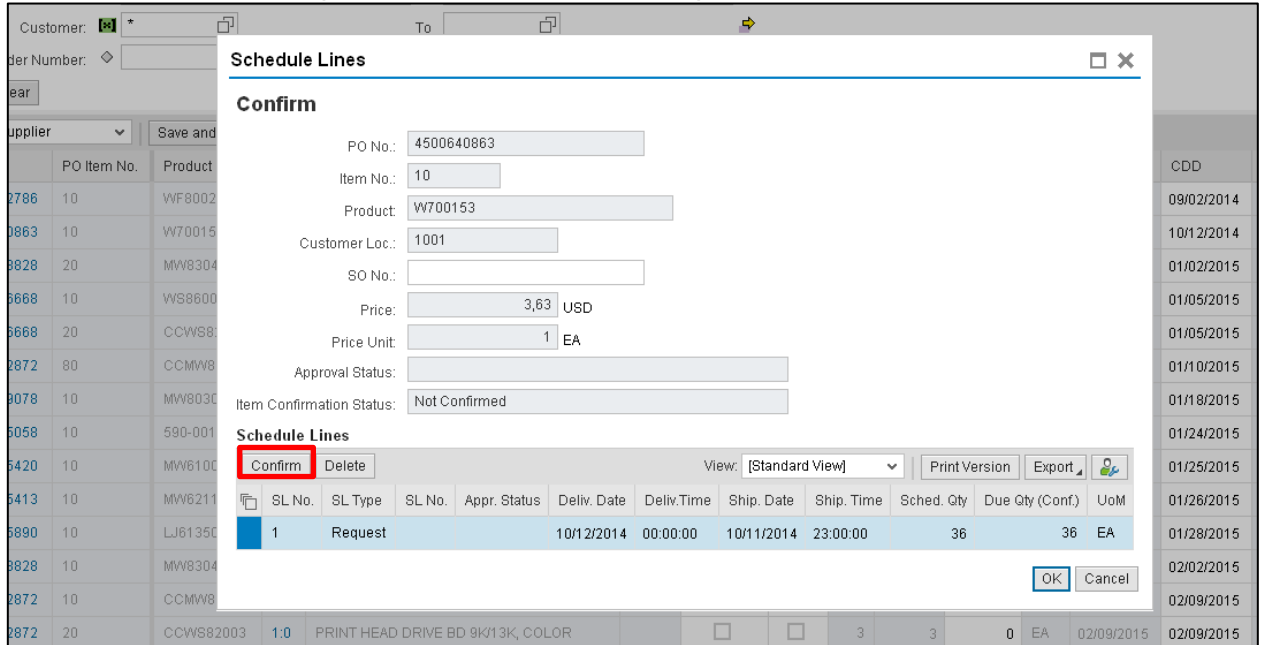
PO Items can be split into schedule lines (different delivery dates):
- Click R:C column for the specific Purchase Order Item.

| Step | Description |
|---|---|
| | |
| 5 | - Confirm schedule line screen is shown in new pop up window.<br>- Click **Confirm** (once per schedule line) to create a schedule line.<br>    o For example, click confirm 3 times to split the PO Item into 3 schedule lines.<br> |
| 6 | - Update **Delivery Date** and **Sched. Qty** to create a schedule line.<br>- Click **Ok**.<br> |

| 7 | • Click **Save and Publish** to send changed to Pitney Bowes back-end system. |



**Note**: Click "Refresh" to make sure lastest updates are displaying(lower right of the screen)



Changes can be acessed by clicking **Change Confirmations**.



**Note**: PO details can be accessed from the *Purchase Order Worklist* screen by clicking **PO No**.



**Note**: The Purchase Order Worklist can be exported by clicking **Export**.

**END OF PO-CONFIRMATION PROCESS**
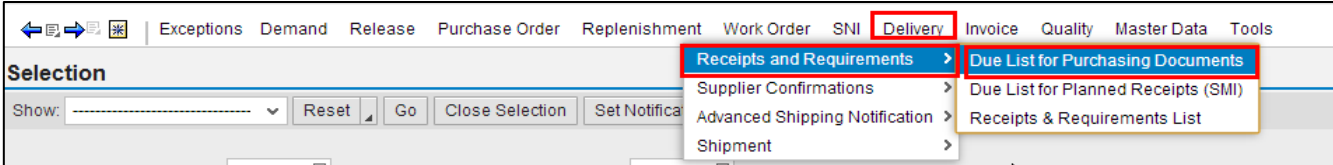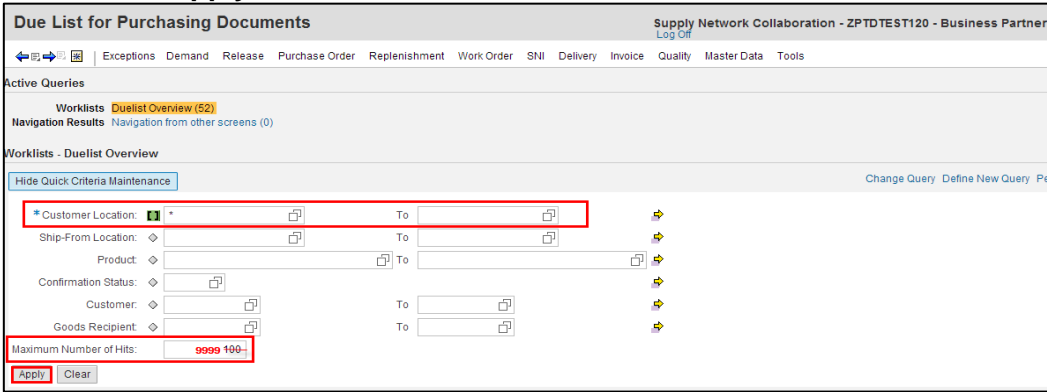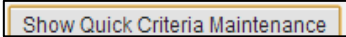
# Section-3

# SNC – Due List for Purchasing Documents

**Objective:** Print Open Orders via Delivery Due List.

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## SNC Due List for Purchasing Documents – Overview

This job aid provides an overview of the Due List for Purchasing Documents within SAP SNC. The due list displays purchase orders (POs), replenishment orders, and scheduling agreement releases that have schedule lines, for which the supplier must still send deliveries to the customer, and for which the supplier must publish Advanced Shipping Notifications (ASNs) in SAP SNC. The due list only displays documents for which SAP SNC determines due schedule lines with an ASN-based due quantity greater than zero. The documents must thus meet certain prerequisites.

## Due List for Purchasing Documents

The following are the steps involved in managing the Delivery Due List:

| Step | Description |
|------|-------------|
| 1 | From the Delivery menu, use the menu path *Receipts and Requirements>Due List* for Purchasing Documents.<br><br> |
| 2 | The Due List of Purchasing Documents will display.<br>• **Customer Location** will default to all locations (*); Update as needed.<br>• The **Maximum Number of Hits** will default to 100. Update to 9999 to capture all open orders.<br>• Click **Apply** to retrieve orders.<br><br><br><br>**Note:** If the selection criteria does not display click **Show Quick Criteria Maintenance**<br> to open. |

| 3 | The Due List screen will display with all open POs and scheduling agreements. |
|---|---|

- Click **Export** ![Export].
- Click **Export to Microsoft Excel** to download open orders.

**Due List for Purchasing Documents**

Supply Network Collaboration - ZPTDTEST120 - Business Partne
Log Off

← ⬇ → ⎙ | Exceptions   Demand   Release   Purchase Order   Replenishment   Work Order   SNI   Delivery   Invoice   Quality   Master Data   Tools

**Active Queries**

Worklists   Duelist Overview (52)
Navigation Results   Navigation from other screens (0)

**Worklists - Duelist Overview**

Hide Quick Criteria Maintenance

Change Query   Define New Query   P

| | | | | | |
|---|---|---|---|---|---|
| * Customer Location: | 1001 | To | 1040 | | ➡ |
| Ship-From Location: ◇ | | To | | | ➡ |
| Product: ◇ | | To | | | ➡ |
| Confirmation Status: ◇ | | | | | ➡ |
| Customer: ◇ | | To | | | ➡ |
| Goods Recipient: ◇ | | To | | | ➡ |
| Maximum Number of Hits: | 9.999 | | | | |

Apply   Clear

View: [Standard View] ∨ | Create ASN   Related ASNs   Print Version   Export

**Export to Microsoft Excel**

| Order Doc.Type | Order Doc. No. | Item No. | SL No. | tomer Loc. | Ship-From Loc. | Ship-To Loc. | Goods Recipient | Due On |
|---|---|---|---|---|---|---|---|---|
| Purchase Order | 4500631964 | 00010 | 1 | DE80010 | 1001 | 0000036534 | PBUSA | 29.08.2014 00 |
| Purchase Order | 4500652786 | 00010 | 1 | WF80024 | 1001 | 0000036534 | PBUSA | 02.09.2014 00 |
| Purchase Order | 4500640863 | 00010 | 1 | W700153 | 1001 | 0000036534 | PBUSA | 12.10.2014 00 |

| 4 | The Open Items report will download to excel which can be manipulated and used as appropriate. |
|---|---|

| | A | B | C | D | E | F | G | H | I | J | K | L | M | N |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Product | RevLvl | Prod.Desc. | Order Doc. No. | Item No. | SL No. | Deliv. Date | Due Qty. | Unit of Measure | Ship-To Loc. | My Product No. | Conf.Stat. | Appr.Stat. | Purch.Group |
| 2 | 1E20-BJG | | LASER PRINTER | 3200000186 | 00010 | 1 | 3/13/2015 | 158 | EA | | | Confirmed | Accepted | 004@QE1CLNT1 |
| 3 | 1E20-NB | | LASER PRINTER | 3200000186 | 00020 | 1 | 3/13/2015 | 8 | EA | | | Confirmed | Accepted | 004@QE1CLNT1 |
| 4 | 1E20-BJG2 | | LASER PRINTER | 3200000187 | 00010 | 1 | 3/13/2015 | 9 | EA | | | Confirmed | Accepted | 004@QE1CLNT1 |
| 5 | 1E20-NB | | LASER PRINTER | 3200000187 | 00020 | 1 | 3/13/2015 | 9 | EA | | | Confirmed | Accepted | 004@QE1CLNT1 |
| 6 | 1E20-BJG | | LASER PRINTER | TST317153 | 000010 | 1 | 3/18/2015 | 320 | EA | 1001 | | | | 004@QE1CLNT1 |
| 7 | 1E20-BJG | | LASER PRINTER | TST317152 | 000010 | 1 | 3/19/2015 | 10 | EA | 1001 | | | | |
| 8 | 1E20-BJG | | LASER PRINTER | TST317154 | 000010 | 1 | 3/19/2015 | 10 | EA | 1001 | | | | |
| 9 | 1E20-BJG2 | | LASER PRINTER | 3200000250 | 00040 | 1 | 3/21/2015 | 10 | EA | | | Not Confirmed | | 004@QE1CLNT1 |
| 10 | 1E20-BJG2 | | LASER PRINTER | 3200000250 | 00050 | 1 | 3/22/2015 | 100 | EA | | | Not Confirmed | | 004@QE1CLNT1 |
| 11 | MW80324 | | ASSY-MOISTENER DECK (PROD : | 4500670671 | 00010 | 1 | 3/30/2015 | 10 | EA | | | Not Confirmed | | 727@QE1CLNT1 |
| 12 | MW80305 | | ASSY - TAR 3 DRIVE | 4500670671 | 00020 | 1 | 3/30/2015 | 4 | EA | | | Not Confirmed | | 727@QE1CLNT1 |

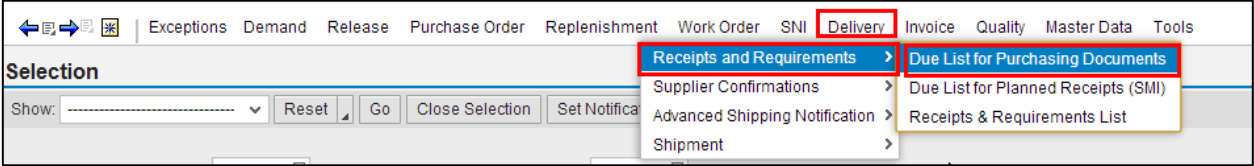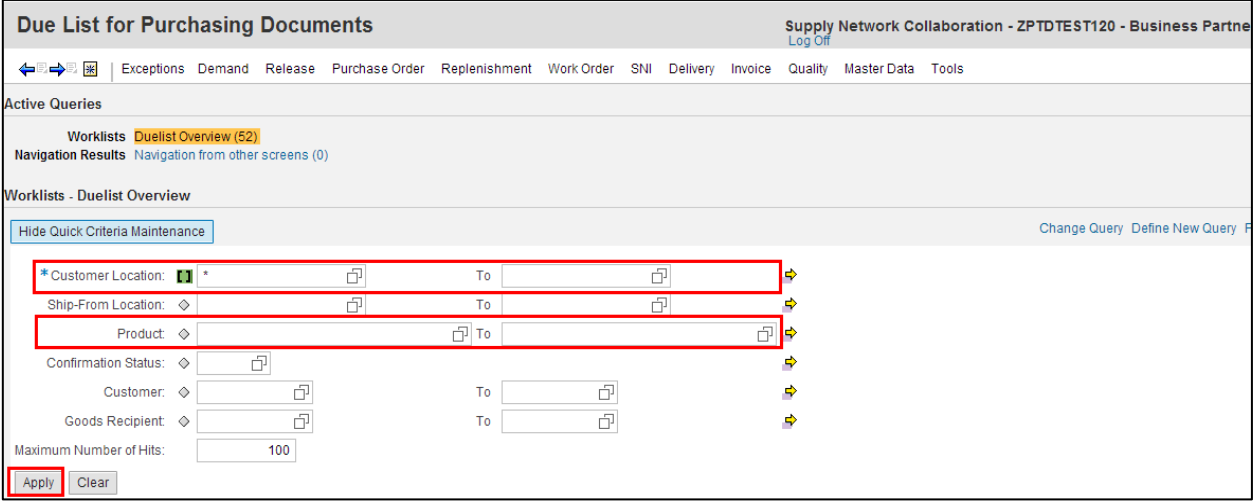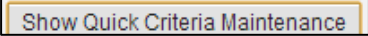**END OF DUE-LIST PROCESS**

# Section-4

# SNC – ASN Creation

**Objective:** **Process to create Advanced Shipping Notifications (ASNs).**

# SNC ASN Maintenance – Overview

This job aid provides an overview of the process flow for creating ASNs. ASNs are key documents in the collaboration between suppliers and Pitney Bowes. A supplier uses an ASN to inform Pitney Bowes when a delivery has been sent. The ASN informs Pitney Bowes which products and quantities are in transit and the expected arrival time of the delivery.

## Creating an ASN

The following are the steps involved in creating an ASN and, subsequently, an invoice:

| Step | Description |
|---|---|
| 1 | From the Delivery menu, use the menu path *Receipts and Requirements>Due List for Purchasing Documents.*<br><br> |
| 2 | The Due List of Purchasing Documents will display.<br>• **Customer Location** will default to all locations (*); Update as needed.<br>• The **Maximum Number of Hits** will default to 100. Update to 9999 to capture all open documents.<br>• **Product** field will default to blank. Enter material number for ASN being created, as needed.<br>• Click **Apply** to retrieve orders.<br><br><br><br>**Note:** If the selection criteria does not display click **Show Quick Criteria Maintenance**  to open.<br>**Note:** It is a good practice to click on "**Refresh**" when going to a new screen, located on lower right of your screen. Refresh ensures the latest version is displaying. |

| 3 | • Select the item(s) for which an ASN needs to be created by clicking the grey-box on the left of the line item.<br>• Click **Create ASN**.<br><br>*An ASN can include multiple line items. Hold down control-key and then select multiple lines. |
|---|---|
| 4 | The *Create ASN* screen will display.<br>• Enter **ASN No.** (step-1)<br>   o Note: The ASN number can be 10 characters and must be unique. It is recommended that the pack slip number is used.<br>• Review the **Delivery Date** and **Shipping Date**; update as needed. (step-2)<br>• Review the **Quantity**; update as needed.(step-3)<br>• *Optional*: To enter the Tracking Number, click the *Shipping Details* tab and enter the tracking number into **Bill/Lading No**. (optional)<br>• Click **Publish ASN** to complete ASN. (step-4)<br> |

| 5 | The Confirmation box will display. |
|---|---|
| | • Click **Yes** to save and send ASN to Pitney Bowes. |

**Confirmation** ✕

Publish the ASN? If yes, the system will check the ASN and publish it if valid.

Yes | No
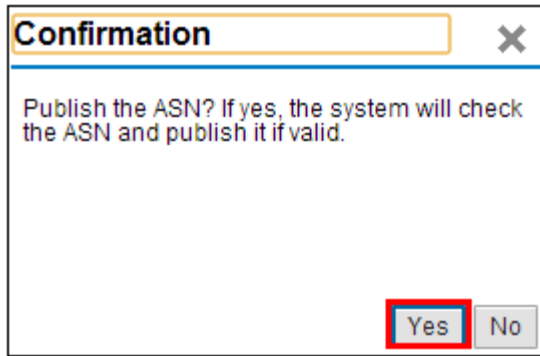
**Note**: Click the back arrow ⬅️ ➡️ twice on upper right of the screen to return to the Due List Report. Refresh screen.

**Note:** It is a good practice to click on "**Refresh"** when going to a new screen, located on lower right of your screen. Refresh ensures the latest version is displaying.

Last Refresh **01.09.2015 10:43:05 EST** Refresh
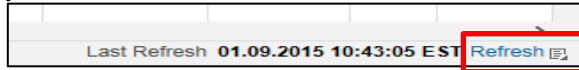
**END OF ASN PROCESS**

# Section-5

# SNC – Invoice Creation
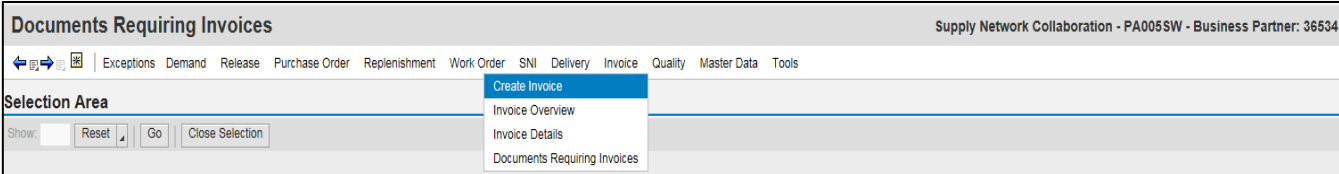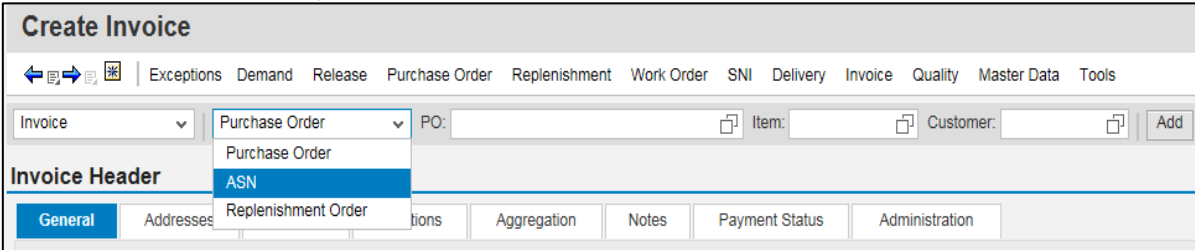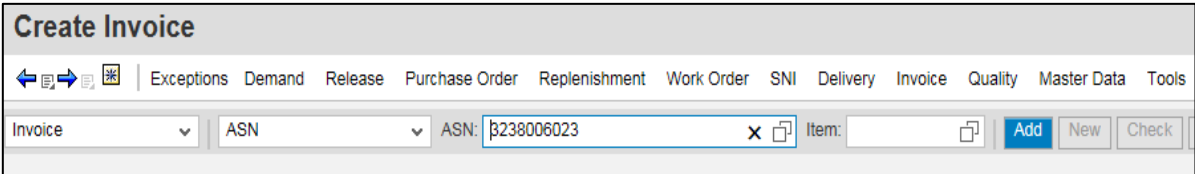
## Objective: Process to Create an Invoice

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## Invoice Creation Overview

This Job Aid provides an overview of the process for creating an invoice in the SNC system. Invoices are submitted to the PB payables system electronically and eliminates the need for paper invoices to be mailed to Pitney Bowes' Accounts Payable. Suppliers can create an invoice for a valid scheduling agreement or purchase order item by using an associated advanced shipping notification as a reference document

## Invoice Creation
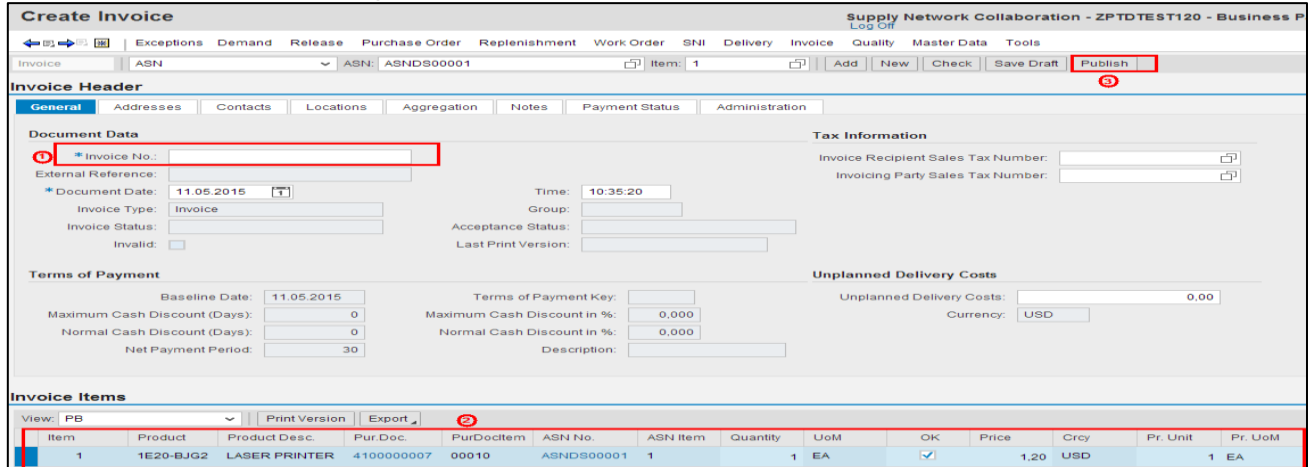
The following are the steps involved in creating an invoice:

| Step | Description |
|------|-------------|
| 1 | From the Invoice menu, click **Create Invoice**  |
| 2 | Select ASN from the drop down list:  Enter or select the ASN number and click on Add:  Note: One or more ASNs can be selected for invoice processing. |

| 3 | Create Invoice screen displays. |
|---|---|

- Enter the **Invoice Number.**
- Review the **Quantity** and **Price**.
- Where applicaple - enter tax (VAT)
- Click **Publish** to complete the invoice.
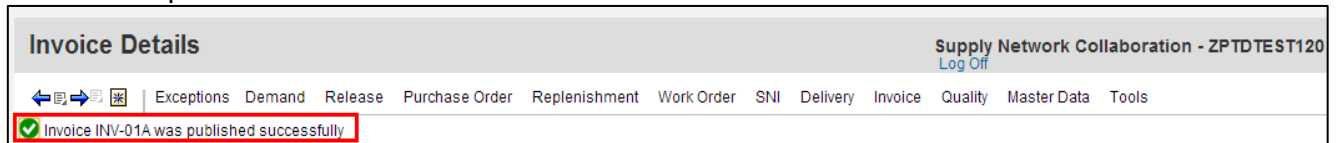


*Where Applicaple*: Entering VAT
Scroll to the right and enter total tax in **Tax Amt** field

| Price | Crcy | Pr. Unit | Pr. UoM | Gross | Net | Tax Amt | Tax Code | Tax Code Desc. |
|---|---|---|---|---|---|---|---|---|
| 7.74 | GBP | 1 | EA | 77.40 | 77.40 | 0.00 | V2 | GBTax code |
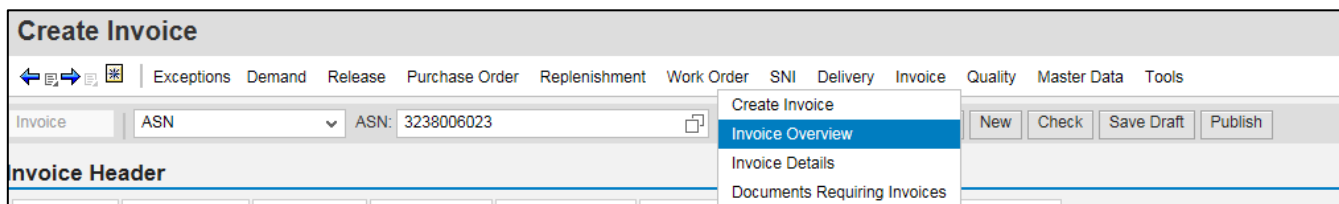
Invoice Complete.



**Note:** Notice of a successful invoice creation will display on top left of screen. The invoice has now been sent to Pitney Bowes' Accounts Payable for processing.

Note:  To view Invoice Status, click on Invoice, Invoice Overview.



**END OF INVOICE PROCESS**

# Section-6

# SMI – Supplier Managed Inventory

**Objective:** Interpret SMI Replenishment Monitor and Create Replenishment Plan
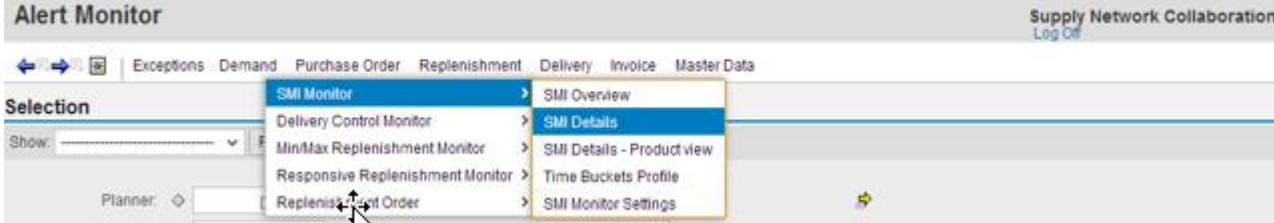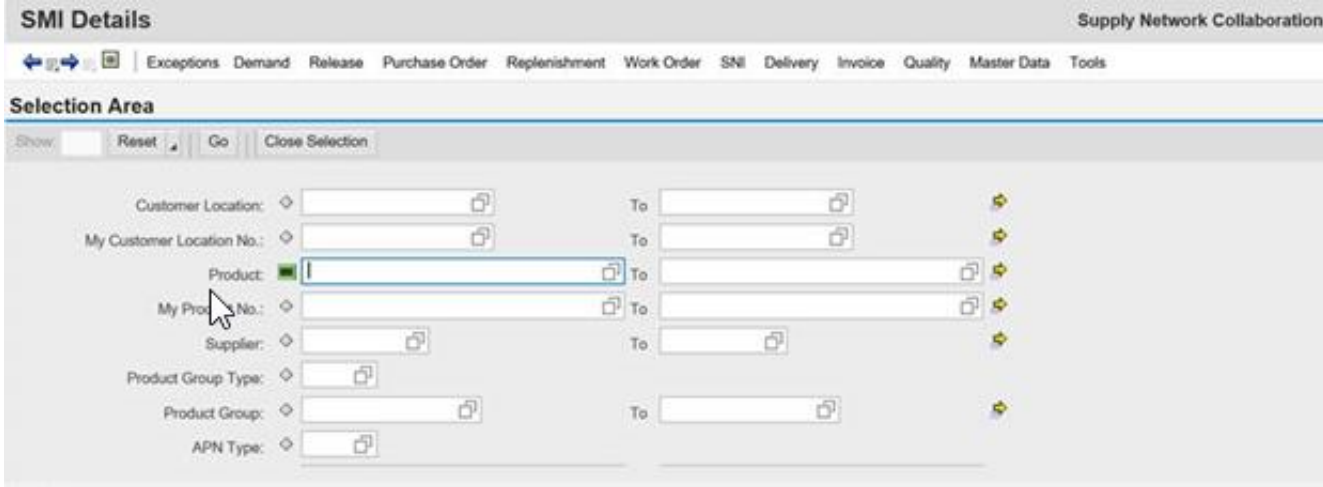
# Supplier Manager Inventory – Overview

This job aid provides an overview of planning using Supplier Managed Inventory (SMI)/ Replenishment Monitor with SAP SNC.  The basis of SMI revolves around providing the supplier information about Pitney Bowes' dependent demand, the current stock level, the minimum stock (safety stock), and the maximum stock levels allowed. Based on this information the supplier can plan the deliveries through Advanced Shipping Notifications (ASN).

The supplier can view this information through the SMI monitor which shows the demand, the min/max stock levels and the projected stock levels based on the demand. The supplier can then enter planned receipts – to see the effect on the proposed stock levels. Alternatively, they can ask the system to suggest planned receipts as well.

# SNC SMI Planning Process
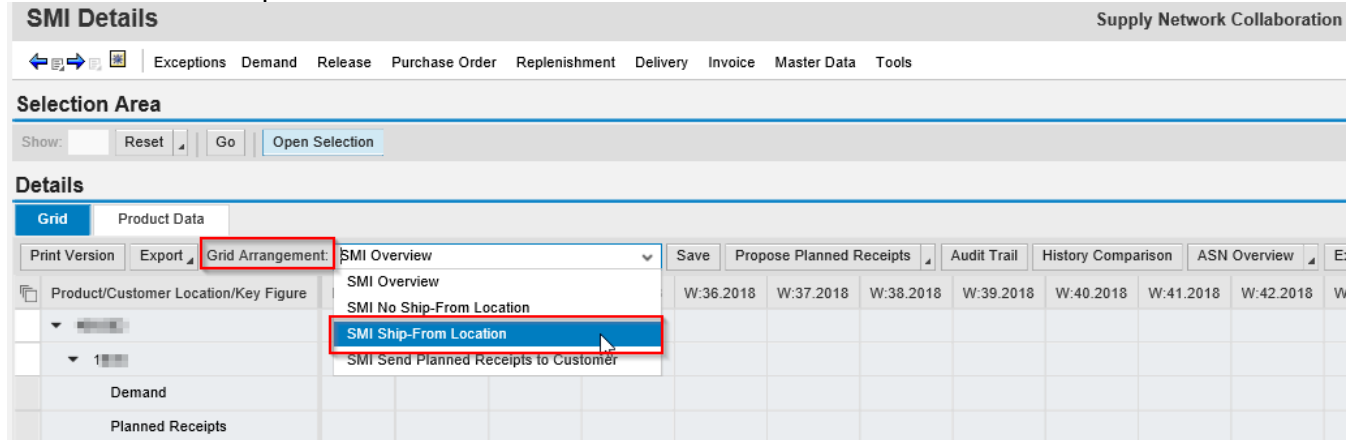
The following are the steps involved in planning with SMI:

| Step | Description |
|------|-------------|
| 1 | From the menu goto *Replenishment> SMI Monitor>SMI Details*. <br><br>  <br><br> Enter Selection Criteria, then select **Go** button <br><br>  |

| 2 | The SMI details will display.<br>• Suppliers should plan to keep projected stock between minimum and maximum stock levels.<br>• The formula for projected stock is:<br>   o (Stock on hand +*plus* Receipts) -*minus* Demand =*equals* projected stock on a given day<br>• To enter or propose planned receipts, choose: **Grid Arrangement >SMI Ship From Location** from the dropdown. |
|---|---|
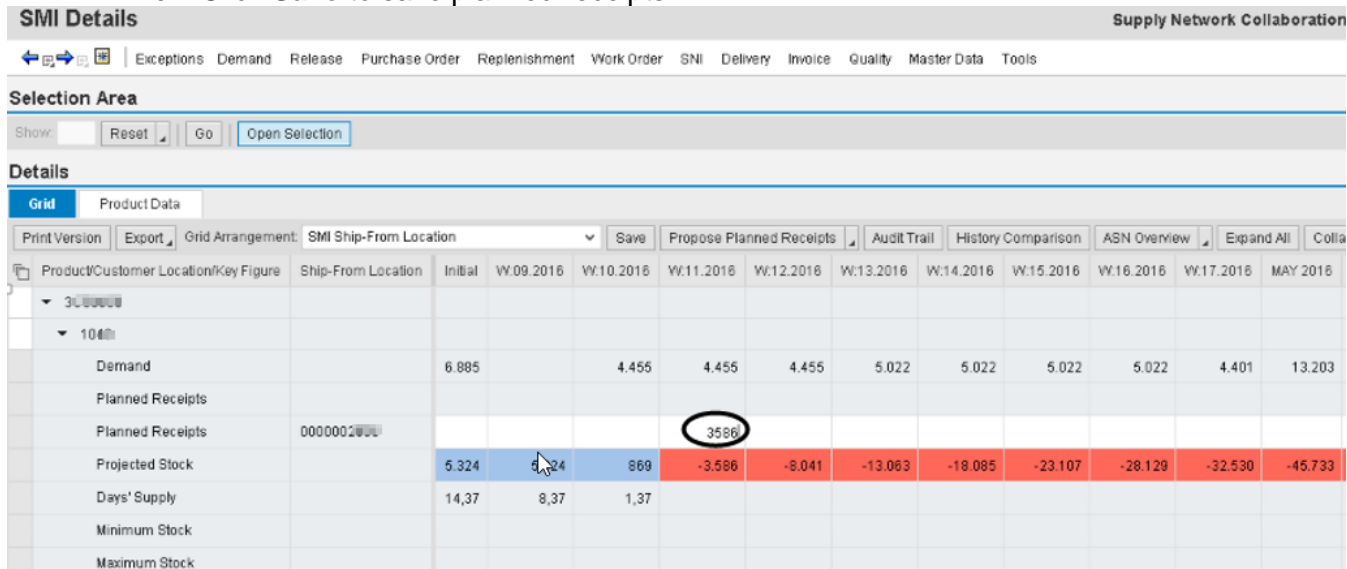
**SMI Details**                  Supply Network Collaboration

← ⮕ 📧 | Exceptions  Demand  Release  Purchase Order  Replenishment  Delivery  Invoice  Master Data  Tools

**Selection Area**

Show: [ ]  Reset | Go | Open Selection

**Details**

Grid | Product Data

Print Version | Export | **Grid Arrangement:** SMI Overview ▾ | Save | Propose Planned Receipts | Audit Trail | History Comparison | ASN Overview | E

| Product/Customer Location/Key Figure | | | W:36.2018 | W:37.2018 | W:38.2018 | W:39.2018 | W:40.2018 | W:41.2018 | W:42.2018 | W |
|---|---|---|---|---|---|---|---|---|---|---|
| ▾ ▓▓▓ | SMI Overview | | | | | | | | | |
| ▾ 1▓▓ | SMI No Ship-From Location | | | | | | | | | |
| Demand | **SMI Ship-From Location** | | | | | | | | | |
| Planned Receipts | SMI Send Planned Receipts to Customer | | | | | | | | | |

| 3 | Enter Planned Receipts.<br>• Manually<br>   o Enter planned receipts and click **Enter** on your keyboard so that the projected stock is updated to consider newly entered planned receipts.<br>   o Click **Save** to save planned receipts. |
|---|---|
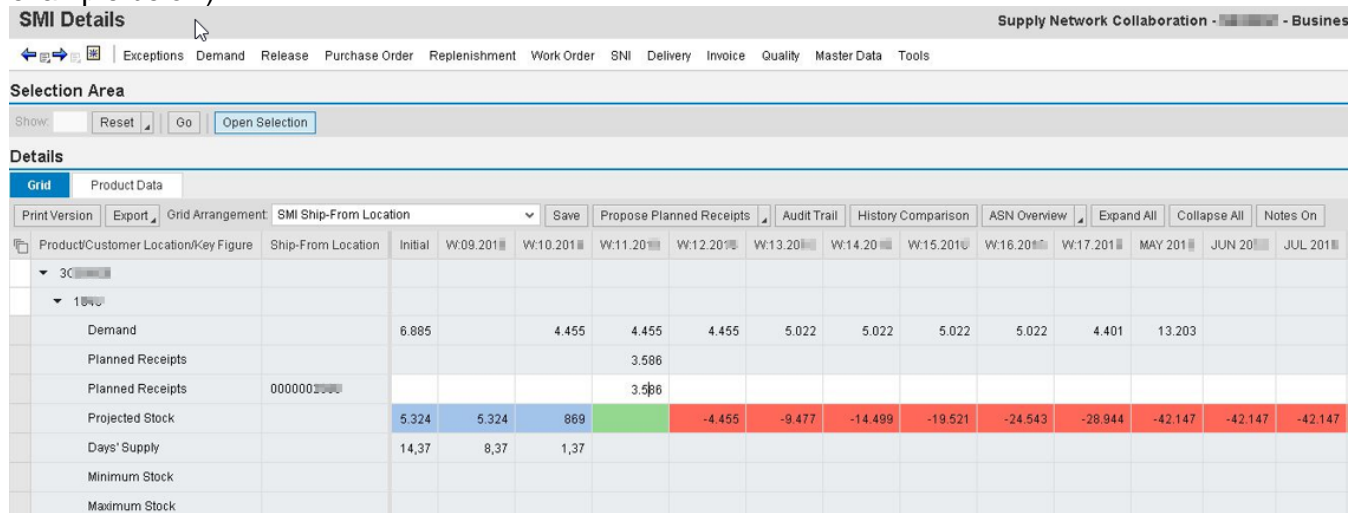
**SMI Details**                  Supply Network Collaboration

← ⮕ 📧 | Exceptions  Demand  Release  Purchase Order  Replenishment  Work Order  SNI  Delivery  Invoice  Quality  Master Data  Tools

**Selection Area**

Show: [ ]  Reset | Go | Open Selection

**Details**

Grid | Product Data

Print Version | Export | Grid Arrangement: SMI Ship-From Location ▾ | Save | Propose Planned Receipts | Audit Trail | History Comparison | ASN Overview | Expand All | Colla
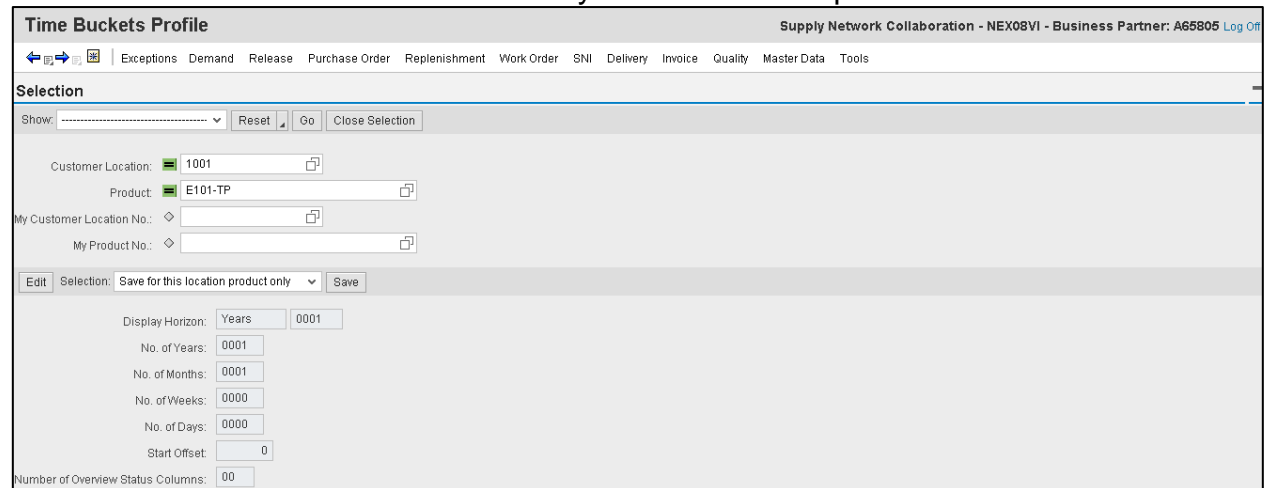
| Product/Customer Location/Key Figure | Ship-From Location | Initial | W.09.2016 | W.10.2016 | W.11.2016 | W.12.2016 | W.13.2016 | W.14.2016 | W.15.2016 | W.16.2016 | W.17.2016 | MAY 2016 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ▾ 3▓▓▓▓▓ | | | | | | | | | | | | |
| ▾ 10▓▓ | | | | | | | | | | | | |
| Demand | | 6.885 | | 4.455 | 4.455 | 4.455 | 5.022 | 5.022 | 5.022 | 5.022 | 4.401 | 13.203 |
| Planned Receipts | | | | | | | | | | | | |
| Planned Receipts | 0000002▓▓▓ | | | | 3586 | | | | | | | |
| Projected Stock | | 5.324 | 5.324 | 869 | -3.586 | -8.041 | -13.063 | -18.085 | -23.107 | -28.129 | -32.530 | -45.733 |
| Days' Supply | | 14,37 | 8,37 | 1,37 | | | | | | | | |
| Minimum Stock | | | | | | | | | | | | |
| Maximum Stock | | | | | | | | | | | | |

• Propose Planned Receipts
   o Click **Propose Planned Receipts** option for the system to propose planned receipts.
      ▪ Note: Propose planned receipts will propose planned receipts so that projected stock will reach maximum stock limit
   o Click **Save** to save planned receipts.

| 4 | New "planned receipts" will calculate and update the "projected stock" (note this is green in the example below) |
|---|---|



Note: This view can be exported by clicking **Export**.
        Key figure values are displayed in periods set in **Time Buckets Profile**.

| 5 | **Time Bucket Settings** |
|---|---|

- Time Buckets Profile can be updated/set by using the menu path ***Replishment>SMI Monitor>Time Buckets Profile***.
  - o **No. of Weeks** is the number of weeks to display <u>in days</u>.
  - o **No. of Months** is the number of months to display <u>in weeks</u>.
  - o **No. of Years** is the number of years to display <u>in months</u>.
  - o **Offset** is the number of days in the future or past.

![Pitney Bowes logo]
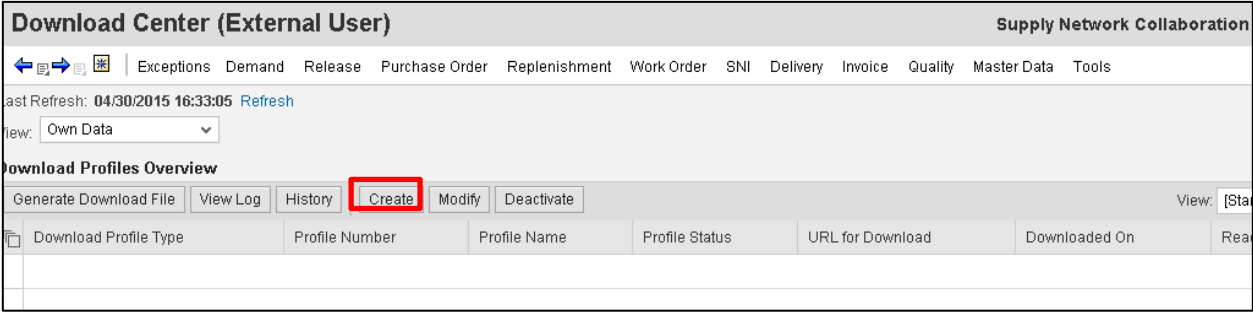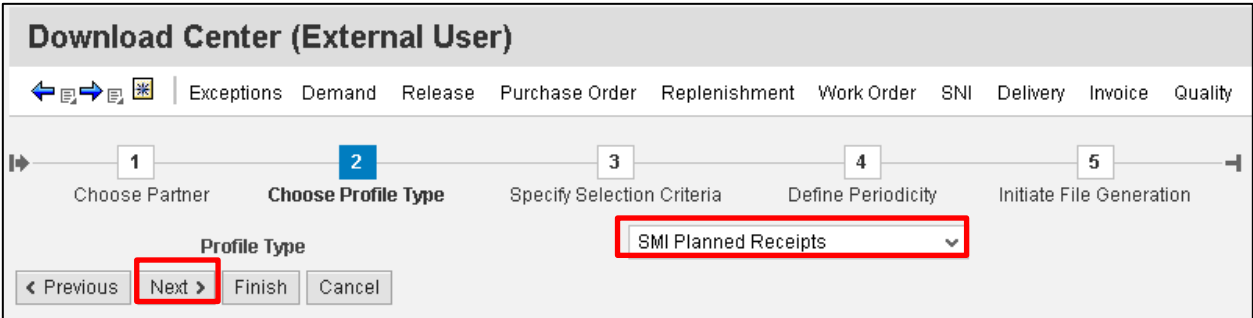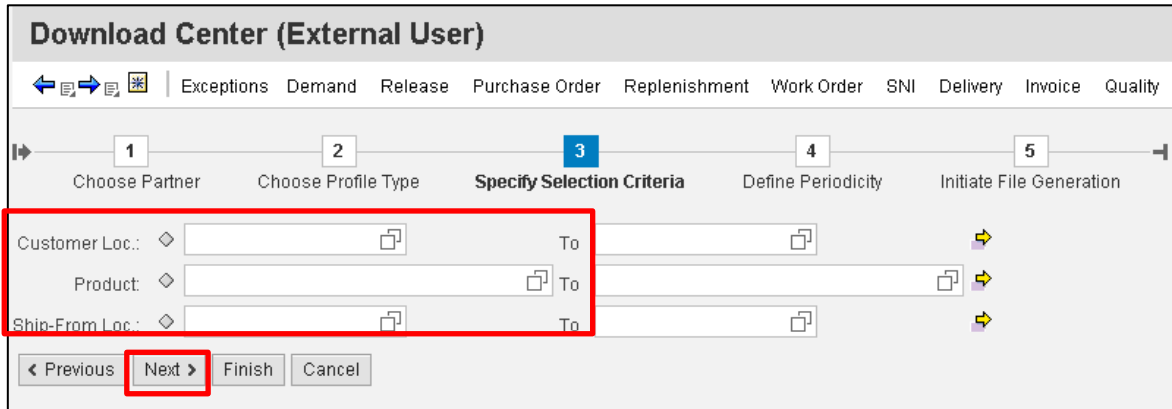
**Planned Receipts:**
**The following are the steps involved in downloading planned receipts in SMI:**

| Step | Description |
|---|---|
| 1 | To download planned receipts, follow the menu path *Tools>File Transfer>Download Center(External User).*<br>• The *Download Center* screen is displayed.<br>• Select **Create**.<br> |
| 2 | • Enter 'PB' in the **Customer** field.<br>• Click **Next**.<br> |
| 3 | • Select **SMI Planned Receipts** from the dropdown.<br>• Click **Next**.<br> |

| 4 | • Enter selection (PB Plant or Product).<br>    o Note: All products data is downloaded if no selection is maintained at this step.<br>• Click **Next**.<br><br>**Download Center (External User)**<br>Exceptions  Demand  Release  Purchase Order  Replenishment  Work Order  SNI  Delivery  Invoice  Quality<br><br>1 Choose Partner — 2 Choose Profile Type — **3 Specify Selection Criteria** — 4 Define Periodicity — 5 Initiate File Generation<br><br>Customer Loc.: ◇ [          ] To [          ]<br>Product: ◇ [          ] To [          ]<br>Ship-From Loc.: ◇ [          ] To [          ]<br><br>‹ Previous   Next ›   Finish   Cancel |
|---|---|
| 5 | • Select **Choose Every day at this time** from the Periodicity dropdown.<br>• Click **Next**.<br><br>**Download Center (External User)**<br>Exceptions  Demand  Release  Purchase Order  Replenishment  Work Order  SNI  Delivery  Invoice  Quality<br><br>1 Choose Partner — 2 Choose Profile Type — 3 Specify Selection Criteria — **4 Define Periodicity** — 5 Initiate File Generation<br><br>Periodicity of File Generation [Every Day at This Time ⌄]<br>‹ Previous   Next ›   Finish   Cancel |
| 6 | • Enter **Profile Name**<br>• Select **Pick Up in Download Center** to access this from Download Center.<br>    o **Note:** This can be sent as an attachment in email by selecting **Deliver as Attachment.**<br>    o **Note:** This can be sent as a link in an email by selecting **Link to Document**.<br>• Select **Finish.**<br><br>**Download Center (External User)**<br>Exceptions  Demand  Release  Purchase Order  Replenishment  Work Order  SNI  Delivery  Invoice  Quality<br><br>1 Choose Partner — 2 Choose Profile Type — 3 Specify Selection Criteria — 4 Define Periodicity — **5 Initiate File Generation**<br><br>*Profile Name [SMI]<br>*Delivery Type of Download File [Pick Up in Download Center ⌄]<br>E-Mail Address naveen.bathini@pb.co[          ]<br>Immediate File Generation ☑<br>‹ Previous   Next ›   Finish   Cancel |

| 7 | The *Download Center* screen is displayed with the profile. |
| --- | --- |
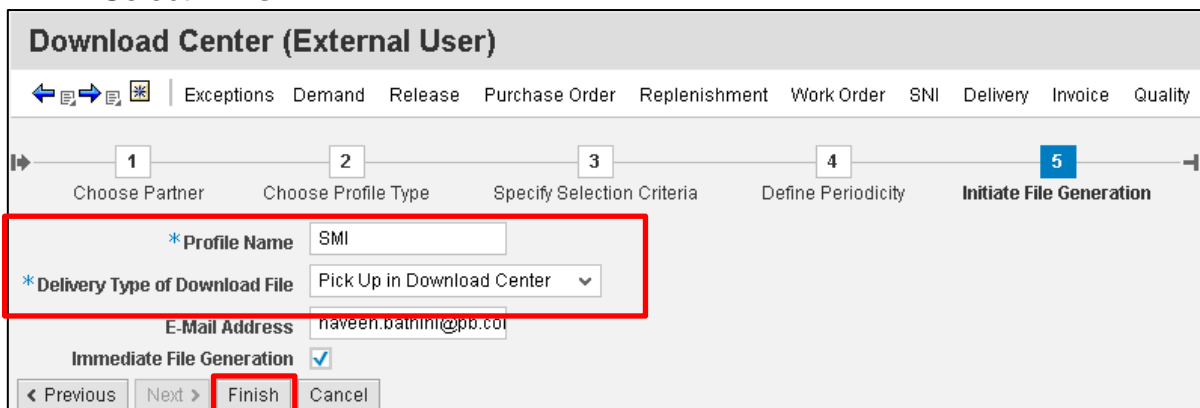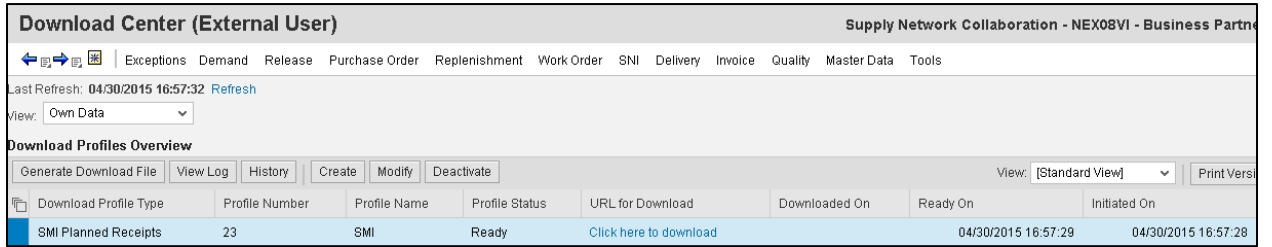


**Note**: The file is available for download since **Pick Up in Download Center** was selected.  Click **Click Here to Download**. Save the file.
The file can be downloaded from the Download Center.

**The following are the steps involved in UPLOADING planned receipts:**

| Step | Description |
|------|-------------|
| 1 | • Open the downloaded file.<br><br>Interface: SMIPLR<br>Owner Pa: 106061<br>Partner: PBUSA<br>Selection: 23<br>Selection: SMI<br>Created B: NEX08VI<br>Created O: 04/30/2015 16:57:28 EST<br><br>*(spreadsheet table)*<br><br>PRODUCT / CUST_LOC / KPRM / KPRMDESC / SHIPFROM / EDITABLE / PERID0 (01/20/201) / PERID1 (########) / PERID2 (5/1/2015) / PERID3 (5/2/2015) / PERID4 (5/3/2015) / PERID5 (5/4/2015) / PERID6 (5/5/2015) / PERID7 (5/6/2015) / PERID8 (5/7/2015) / PEI (5/...<br><br>787-D 1001 DEMAND Demand — PERID0: 2.083<br>787-D 1001 AVGDEMA Average Demand<br>787-D 1001 PLANSHIP Planned Receipts - Aggregated — PERID2: 10, PERID3: 20, PERID4: 30<br>787-D 1001 PLANSHIP Planned R 106061 — PERID2: 10, PERID3: 20, PERID4: 30<br>787-D 1001 PLANSHIP Planned R 106061 X<br>787-D 1001 URPLANSH Raw Net Demand<br>787-D 1001 INTRANSI In-Transit Quantity - Aggregated<br>787-D 1001 INTRANSI In-Transit 106061<br>787-D 1001 PROJSTOC Projected Stock — -1.502, -1.502, -1.492, -1.472, -1.442, -1.442, -1.442, -1.442, -1.442<br>787-D 1001 DAYSOFSU Days' Supply<br>787-D 1001 MINPROP Minimum Proposal — 1.512, 1.512, 1.502, 1.482, 1.452, 1.452, 1.452, 1.452, 1.452<br>787-D 1001 MAXPROP Maximum Proposal — 1.602, 1.602, 1.592, 1.572, 1.542, 1.542, 1.542, 1.542, 1.542 |
| 2 | • Update **Ship From Location** field to add leading zeros (total 10 characters) when numeric<br>• Update Planned Receipts in row marked with 'X' on time buckets.<br><br>Interface: SMIPLR<br>Owner Pa: 106061<br>Partner: PBUSA<br>Selection: 23<br>Selection: SMI<br>Created B: NEX08VI<br>Created O: 04/30/2015 16:57:28 EST<br><br>*(spreadsheet table)*<br><br>PRODUCT / CUST_LOC / KPRM / KPRMDESC / SHIPFROM / EDITABLE / PERID0 (01/20/201) / PERID1 (########) / PERID2 (5/1/2015) / PERID3 (5/2/2015) / PERID4 (5/3/2015) / PERID5 (5/4/2015) / PERID6 (5/5/2015) / PERID7 (5/6/2015) / PERID8 (5/7/2015)<br><br>787-D 1001 DEMAND Demand — PERID0: 2.083<br>787-D 1001 AVGDEMA Average Demand<br>787-D 1001 PLANSHIP Planned Receipts - Aggregated — PERID2: 10, PERID3: 20, PERID4: 30<br>787-D 1001 PLANSHIP Planned R 106061 — PERID2: 10, PERID3: 20, PERID4: 30<br>787-D 1001 PLANSHIP Planned R 0000106060 X — PERID6: 50, PERID7: 80, PERID8: 90<br>787-D 1001 URPLANSH Raw Net Demand<br>787-D 1001 INTRANSI In-Transit Quantity - Aggregated<br>787-D 1001 INTRANSI In-Transit 106061<br>787-D 1001 PROJSTOC Projected Stock — -1.502, -1.502, -1.492, -1.472, -1.442, -1.442, -1.442, -1.442, -1.442<br>787-D 1001 DAYSOFSU Days' Supply<br>787-D 1001 MINPROP Minimum Proposal — 1.512, 1.512, 1.502, 1.482, 1.452, 1.452, 1.452, 1.452, 1.452<br>787-D 1001 MAXPROP Maximum Proposal — 1.602, 1.602, 1.592, 1.572, 1.542, 1.542, 1.542, 1.542, 1.542 |

| 3 | • Save the file in .csv format to your local drive<br>• Follow the menu path *Tools>File Transfer>Upload Center (External User)*<br>• The *Upload Center* screen is displayed.<br><br><br>Click **Create**. |
|---|---|
| 4 | • Enter **Profile Name**.<br>• Choose **SMI Planned Receipts** as Object Type.<br>• Enter **PB** as Customer<br>• Click **Browse** to select the file.<br>• Click **Save**.<br> |

Planned receipts are updated in SMI when the status shows **Ready**.



The same profile can be used to upload new files by clicking Upload.

**END OF SMI PROCESS**

P a g e | 2 9

# Section-7

# Scheduling Agreements

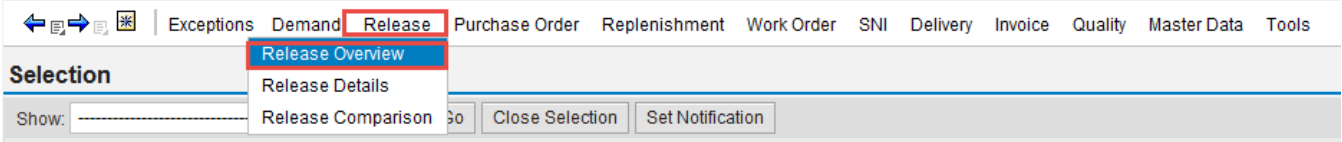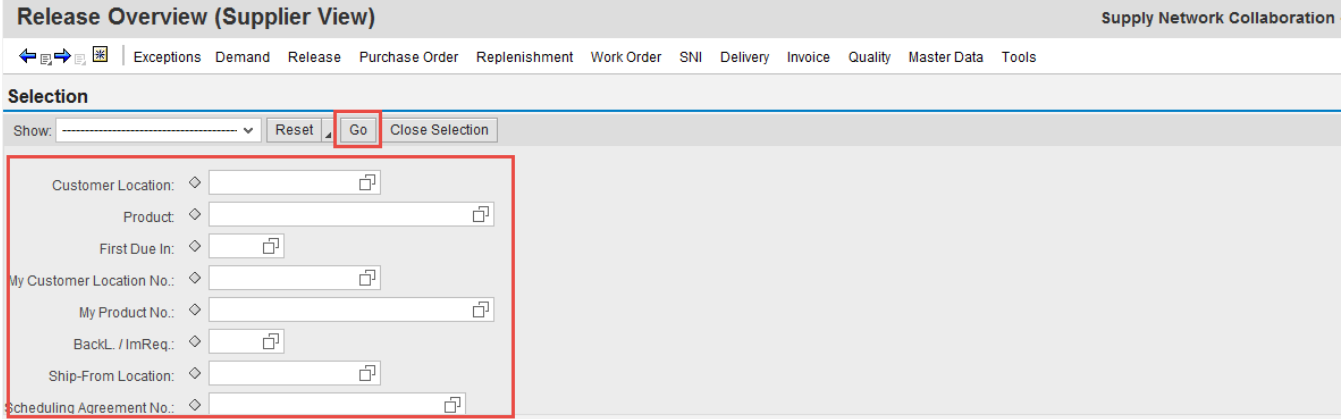### Objective: Scheduling Agreement Overview and Details views

## Scheduling Agreement – Overview

This job aid provides an overview of how to access Scheduling Agreements and order details within SAP SNC.  .

## Purchase Order Worklist

The following are the steps involved in managing the Purchase Order Worklist:

| Step | Description |
|------|-------------|
| 1 | From the menu bar, use the path Release -> Release Overview<br> |
| 2 | Enter selection criteria as required. Click **Go**.<br> |

**3** Scheduling Agreement Releases will display



**4** Select Scheduling Agreement by clicking the box to the left of the order number, then **Details** button to display details



**5** Details of selected Scheduling Agreement will display

| 6 | Note the "Commitment Level" of the scheduled delivery; |
|---|---|

- <u>Production and Material Go-Ahead</u> = This is a firm order, build and ship according to the delivery-date and quantity listed *unless managing materials using SMI*.
- <u>Material Go-Ahead</u> = *If authorized by PB Procurement*, the material go-ahead status allows for the purchase of materials but not to build as dates and quantities may change.
- <u>Forecast</u> = Forecast line for informational purposes only.

Release History - Product R700066 ( Scheduling Agreement 5500020417 Item 10 ) Ship-To Location : 1040

Display SL | Print | Acknowledge | Reject | Compare Releases | Notes | Related ASNs | Due List | R/R List

View: [Standard View] | Print Version | Export

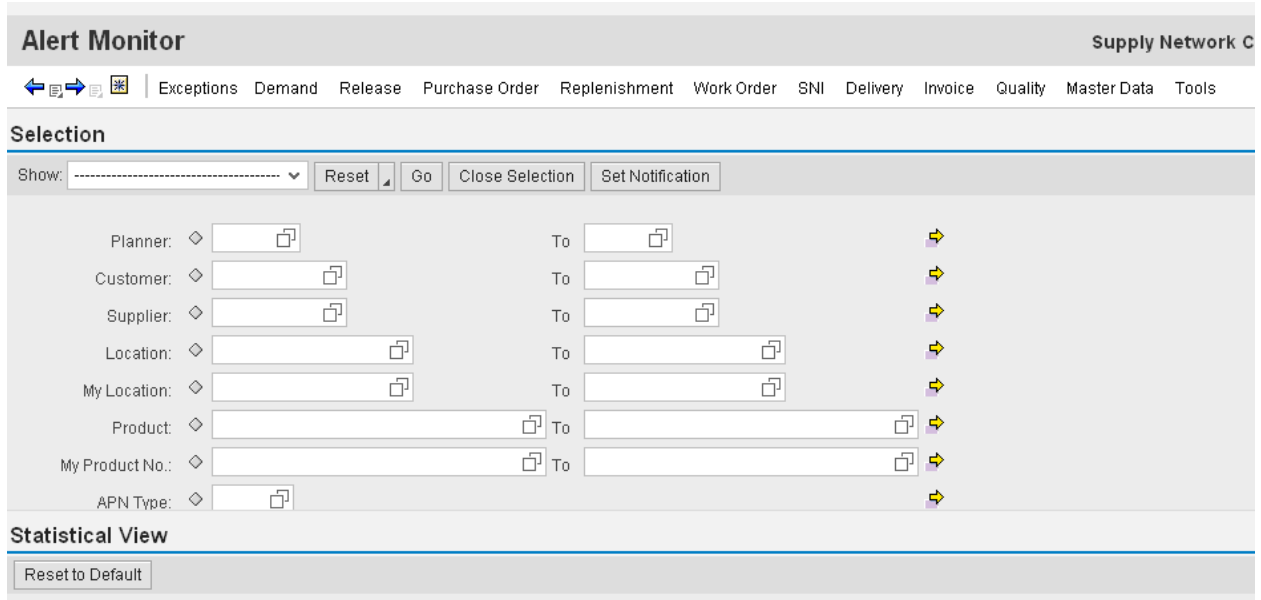| Period | Shipping Date | Delivery Date | Schedule Line Quantity | Due Quantity | UoM | Commitment Level | Cml. Sched. Qty | Change No. | Notes |
|---|---|---|---|---|---|---|---|---|---|
| Day | 01.04.2016 | 01.04.2016 | | 142 | 142 EA | Production and Material Go-Ahead | 142 | | ☐ |
| Day | 02.05.2016 | 02.05.2016 | | 378 | 378 EA | Production and Material Go-Ahead | 520 | | ☐ |
| Day | 01.06.2016 | 01.06.2016 | | 252 | 252 EA | Production and Material Go-Ahead | 772 | | ☐ |
| Day | 05.07.2016 | 05.07.2016 | | 756 | 756 EA | Material Go-Ahead | 1.528 | | ☐ |
| Day | 01.08.2016 | 01.08.2016 | | 500 | 500 EA | Material Go-Ahead | 2.028 | | ☐ |
| Day | 01.08.2016 | 01.08.2016 | | 1.152 | 1.152 EA | Forecast | 142 | | ☐ |
| Day | 01.09.2016 | 01.09.2016 | | 1.152 | 1.152 EA | Forecast | 520 | | ☐ |

**END OF SCHEDULING AGREEMENT PROCESS**

# Section-8

# Alerts – Alert-Monitor

### Objective: Setting and Using Alerts

**Follow menu path Exceptions – Alert Monitor**
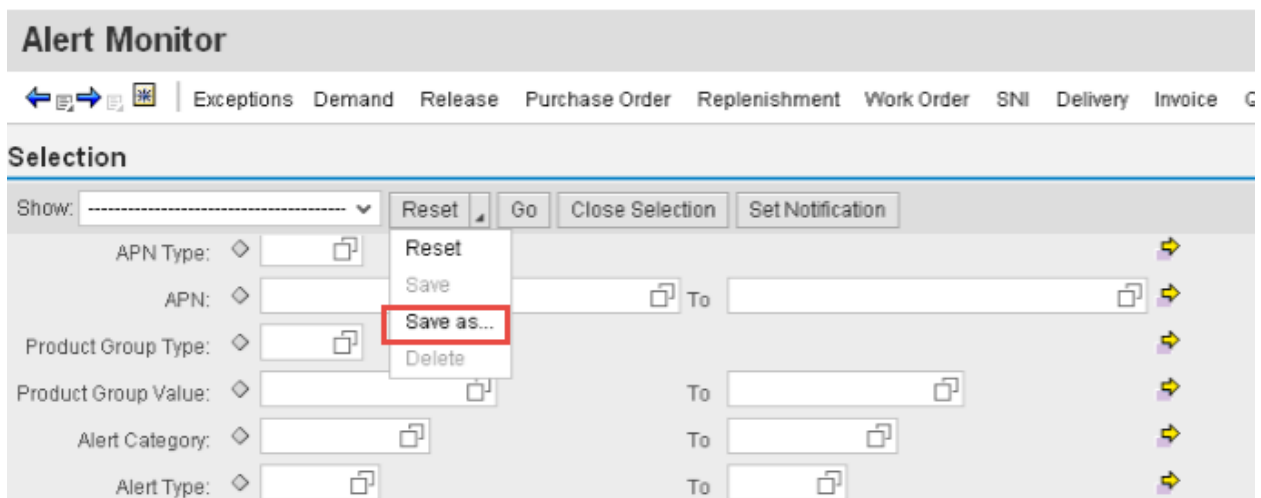


In order to use alert notification users must save selections first. This selection determines which alerts are sent in alert notification email.

To receive all alerts in email click on save button without entering any selection filters. To filter alerts enter alert types that should be displayed/emailed.

To save selection, click on dropdown icon on bottom-right corner to expand and click on "Save as".

Receive all alerts:

**Receive New PO, change PO alerts:**

Enter the following Alert Types;

- 7051 – New PO Item
- 7052 – Changed PO Item



Provide a unique name. Choose "Default" checkbox if this should be used as default selection every time alert monitor screen is called.
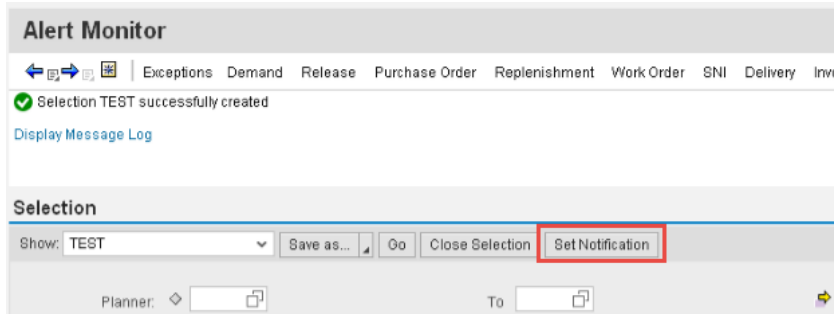


The dropdown User-Specific and Partner-Specific determines whether the selection can be used by other users within your organization or is the selection is only valid for your user id.



Click on Ok to save. System will display a message that selection is saved.

P a g e  |  3 6

**Now, click on Set Notification tab to create alert notification**.



- Recipient Type:
    o U – User in System (Uses email address associated with the user)
    o C- Channel (Enables to enter email address and/or phone, fax numbers)

- Message Channel: Email – Email (alert management) – Choose this option for email.
- Minimum Priority: Choose 3 – information
- Immediate notification/periodic notification: Choose immediate notification to be notified immediately every time an alert is created. (For example, every time a new PO is created in SNC)
- Provide start date, time, and interval for periodic jobs.
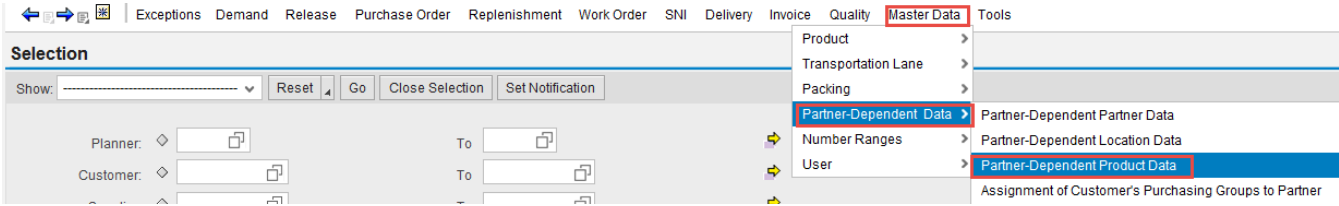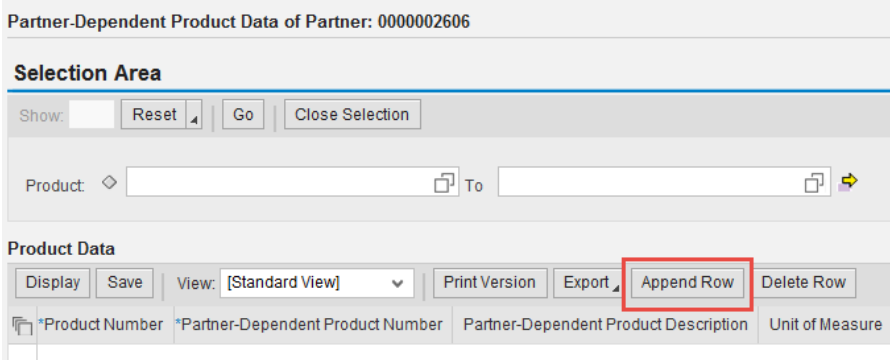


**END OF ALERT PROCESS**

**Section-9**
**Product Data (vendor part number)**
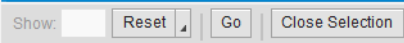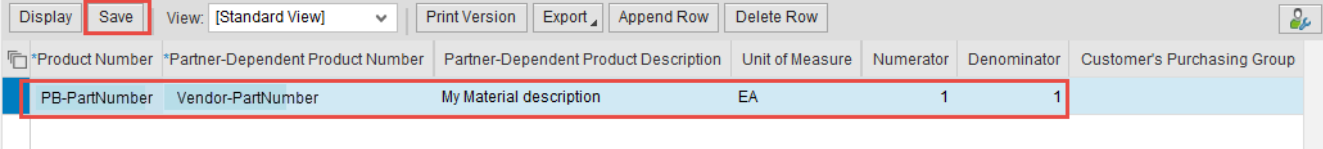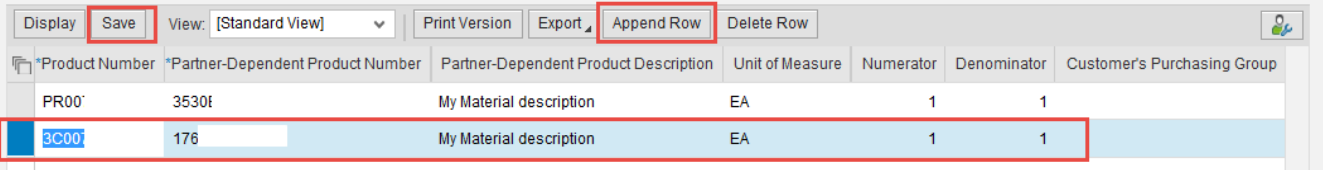**Report Settings**
**Download/Upload Center**

✓ **Objective: Product Data and Report Settings.** Here you'll also find how to add your part numbers to SNC and adjust report formats to include and exclude fields.

This job aid provides an overview of how to associate your part numbers with PB part numbers .

## Product Data Administration (Vendor Part Numbers)

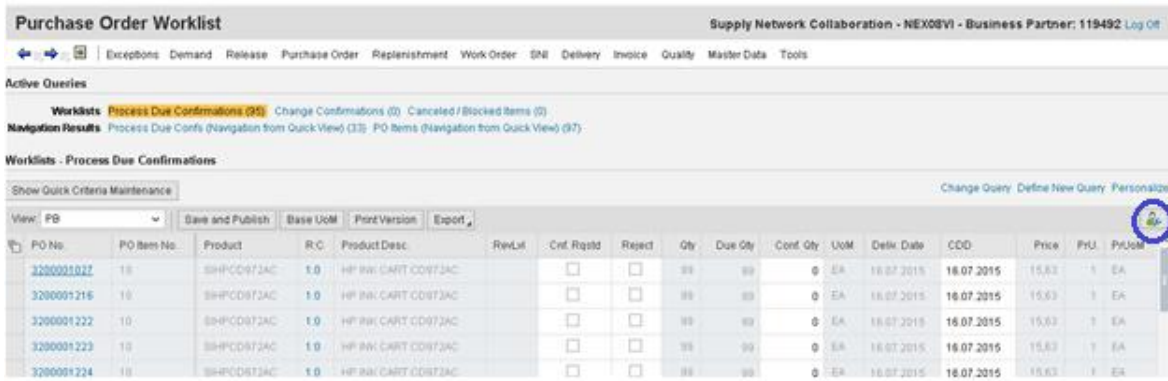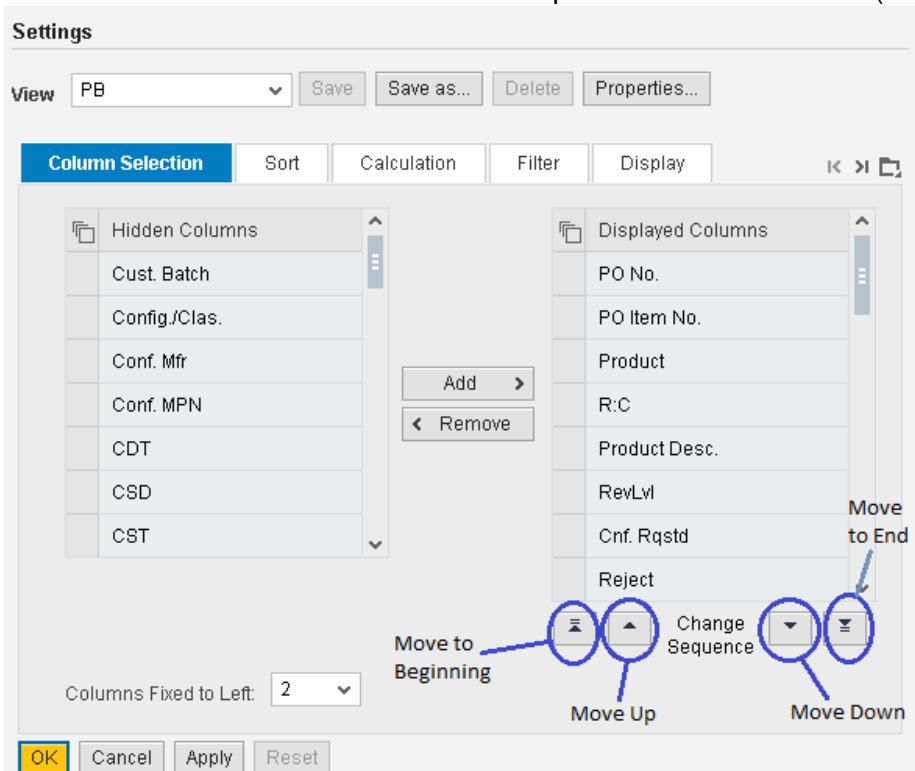The following are the steps involved in managing vendor/customer material numbers

| Step | Description |
|------|-------------|
| 1 | Vendor Material Numbers Navigation Path:<br>Master Data > Partner Dependent Data >Partner Dependent Product Data<br><br> |
| 2 | Select Append Row button<br><br> |

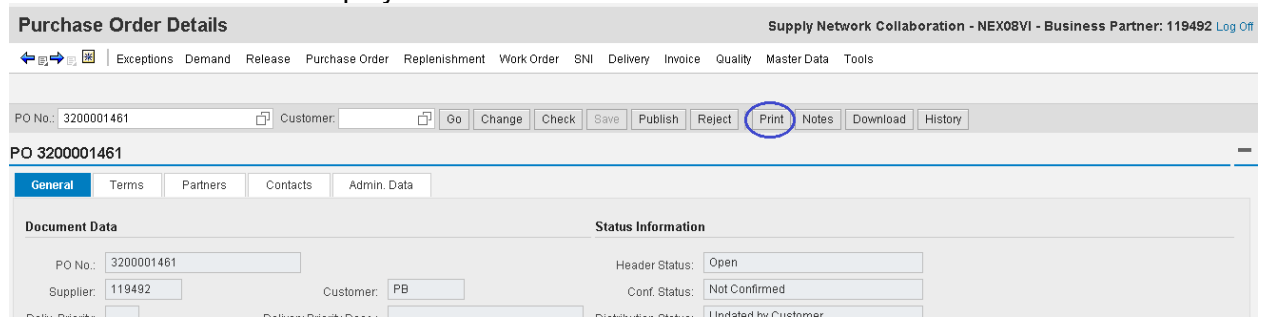| Step | Description |
|---|---|
| 3 | Editable row is added. In each row enter the PB part-number, then your part-number, followed by description. Unit-of-measure enter "EA", Numerator/Denominator enter "1" in each field. Click "Save".<br><br>**Selection Area**<br>Show: [ ] Reset Go Close Selection<br><br>Product: ◇ [ ] To [ ] →<br><br>**Product Data**<br>Display **Save** View: [Standard View] ⌄ Print Version Export Append Row Delete Row<br><br>| *Product Number | *Partner-Dependent Product Number | Partner-Dependent Product Description | Unit of Measure | Numerator | Denominator | Customer's Purchasing Group |<br>| PB-PartNumber | Vendor-PartNumber | My Material description | EA | 1 | 1 | | |
| 4 | Repeat process to add additional parts. Click Append Row, enter data, click Save. Repeat as needed.<br><br>**Product Data**<br>Display **Save** View: [Standard View] ⌄ Print Version Export **Append Row** Delete Row<br><br>| *Product Number | *Partner-Dependent Product Number | Partner-Dependent Product Description | Unit of Measure | Numerator | Denominator | Customer's Purchasing Group |<br>| PR00` | 3530E | My Material description | EA | 1 | 1 | |<br>| 3C00` | 176 | My Material description | EA | 1 | 1 | |<br><br>**END OF VENDOR PART NUMBER ADD PROCESS** |

### Report Settings
The following are the steps involved in adding or removing columns to a report.

| Step | Description |
|------|-------------|
| 1 | When in any report view click on "Open Settings Dialog" (Tool) button.  |
| 2 | Hidden fields are displayed on the left side, displayed fields are on the right side.<br><br>To Hide fields:<br>• Select field from 'Displayed Columns' and click on Remove button to hide fields.<br>To Unhide fields:<br>• Select field or fields from 'Hidden Columns' and click on Remove button to hide fields.<br>To Change column position.<br>• Select column and click on move up or move down buttons (Change Sequence).  |

| 3 | Print PO:<br>• Go to PO details screen<br>• PO Details are displayed. Click "Print" button.<br><br><br><br>**END OF REPORT FORMATTING PROCESS** |
|---|---|
|   |   |

## Download and Upload Center

The following are the steps involved in downloading (and uploading)information from SNC.

| Step | Description |
|------|-------------|
| 1 | Go to Tools > File Transfer > Download Center (External user).<br><br> |
| 2 | Download Center will display. Click "Create" button.<br><br> |

| | | |
|---|---|---|
| 3 | Select Customer "PB", then click "Next" button |  |
| 4 | Choose Report to Download using dropdown (in this example we will use Due-List for Purchasing Documents). Then click "Next" button. |  |
| 5 | Enter Selections (if needed), then click "Next" |  |

| 6 | Select frequency of report generation (i.e. one-time, every-day, etc). Then click "Next" |
|---|---|



| 7 | Enter a name for the report in the "Profile Name "field. Select Delivery type; |
|---|---|
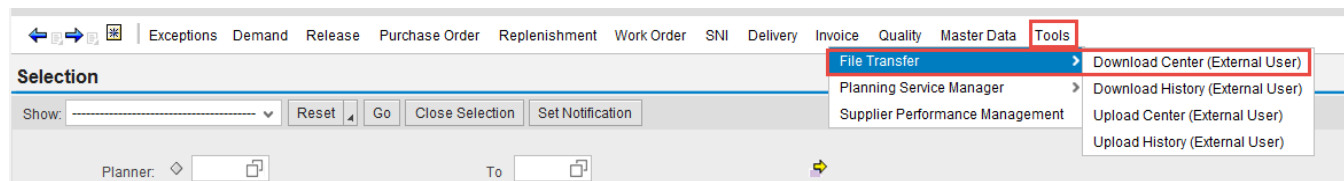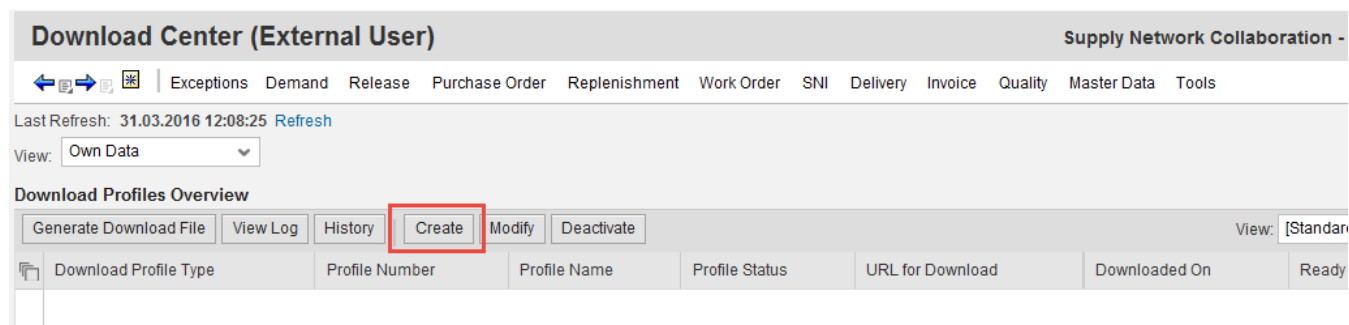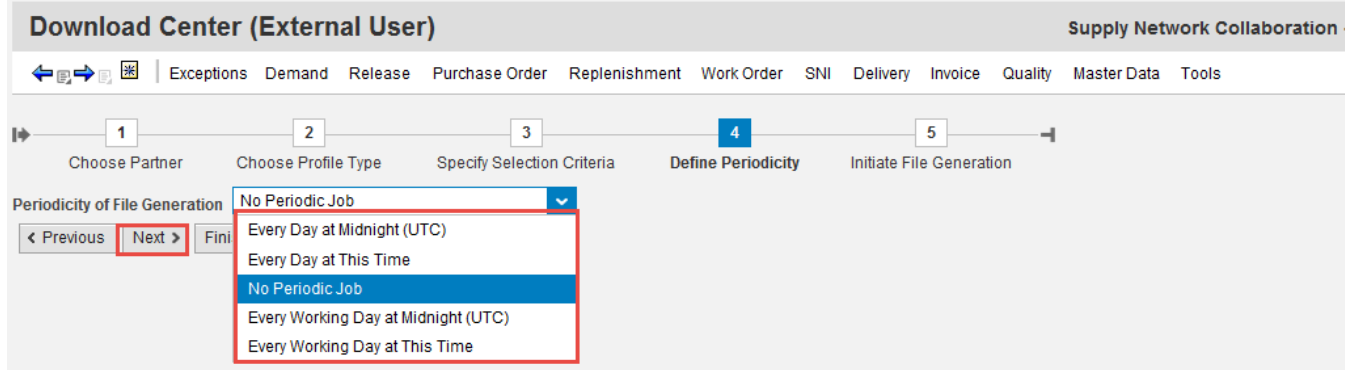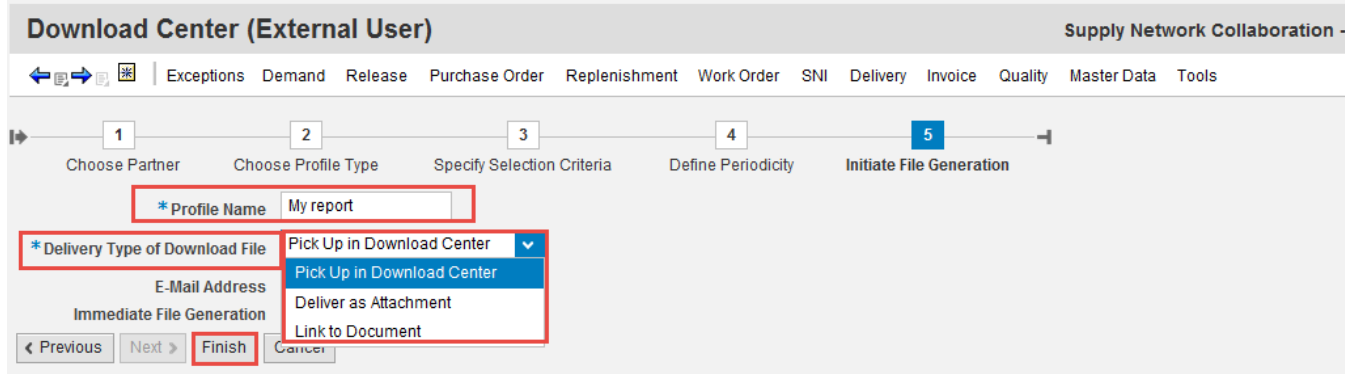
- o "Pick Up in Download Center" means it will be picked up within SNC
- o "Delivered as Attachment" means it will be emailed as an attachment to the email address noted in the "E-Mail Address" field
- o "Link to Document" means a link will be emailed to access the report within SNC



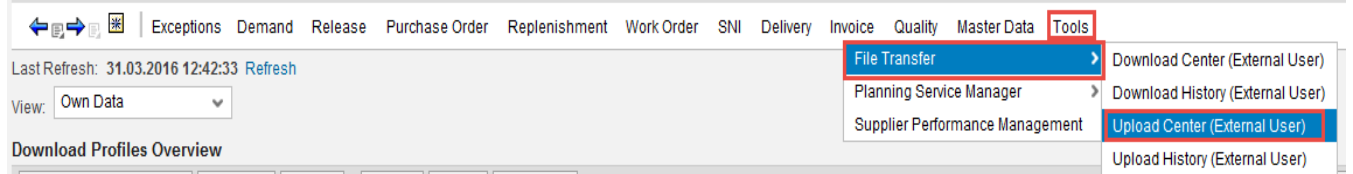| 8 | Click "Refresh", then "Click here to download" |
|---|---|

| 9 | Report will Download |
|---|---|



| 10 | Enter ASN Number, Ship Date.<br>Update Means of Transportation( in this field you must leading zeros '0001)<br>Update Quantity if needed.<br>SAVE the file locally after updates. |
|---|---|



| 11 | Go to SNC Menu and access Upload Center |
|---|---|



| 12 | Upload Center will display, click on "Create" button |
|---|---|

| 13 | Enter the following; |
|---|---|
| | - "Profile Name" enter report name (any name you choose)<br>- "Object Type" select from drop-down<br>- "Customer" enter PB<br>- Browse and select file for upload<br>- Click "Save" when done |
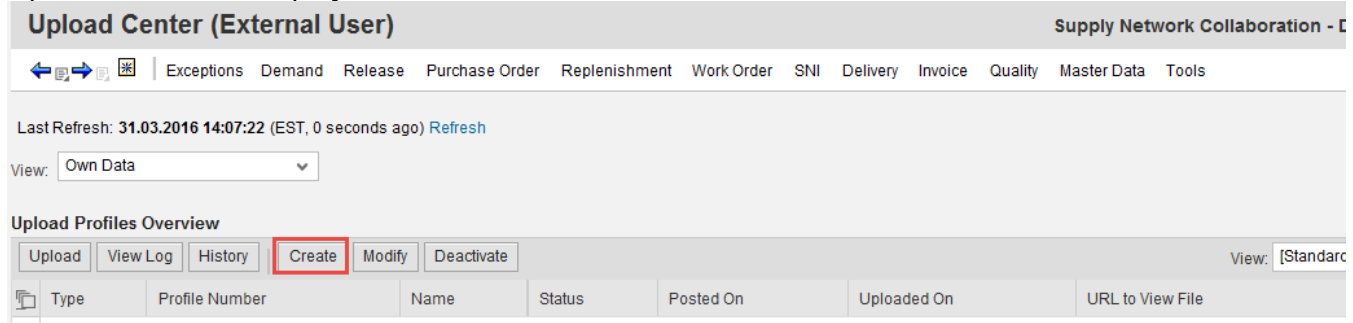


**END OF DOWNLOAD-UPLOAD CENTER PROCESS**