

## **May 2008: Increasing the Efficiency of Exception Driven PO Worksheet Reviews**

### **Overview:**

We continue to update the Datalliance™ offering to increase the value of the service provided to our customers. With the April 2008 release, extended functionality was added to help increase the efficiency and effectiveness of VMI Planners during their PO Worksheet reviews. During the PO Worksheet review process, we want to continue to assist the VMI Planner to be exception driven. This means focusing only on those items that are associated with one or more Alerts. If in your strive to be as efficient as possible you have:

- wished you had the ability to view items with like 'Alerts' together or
- wanted to see PA History or PO History for an item without having to navigate to Item Details,

You will want to read on. The enhancements outlined below were added based on customer feedback, with the express intent of increasing Planner efficiency in the review of Alerts.

### **PO Worksheet Details:**

In the past, the default sort order for a worksheet was 'Alert Count'. This sort order ranked items based on the number of alerts for an item. While those items with the most Alerts may deserve the most attention, feedback from customers indicates that some prefer to 'work' Alerts of the same type together. We have listened to this feedback and added an option to sort a PO Worksheet by 'Alert Grouping'. This will group together 'like' Alerts and based on the lowest Alert Number (Alerts 1 to 26) associated with an item. By navigating to the sort menu, the Alert Grouping can be selected as the sort order. In addition, the user now has the option to set his/her own preferences for the Default Sort Order for a PO Worksheet. If you want to use the new Alert Grouping as your default sort order, select the Default Sort Order entry and click on the radio button next to Alert Grouping. This selection will now be used as the sort order each time you open a PO Worksheet. The screen shot below show how these selections can be made:

AC	Supp Cat	Dist UPC	Description	Use...	PG	OQ	OQ U...	NQA	OP	Dst ...	OP Type	Ext Val	Last PA	Las...	Pre Da...	Post D...
3	1051 1/2C					100	EA	3	47	EA	Calc OP	136...	03-25-2008		2	88
2	128ATK					20	EA	0	18	EA	Calc OP	648...	02-08-2008		0	87
2	7338					25	EA	0	4	EA	Calc OP	166...	03-24-2008		0	227
2	003/8A1					100	EA	9	100	EA	Dist OP	117...	03-12-2008		47	574
2	2-TB14					100	EA	1	10	EA	Calc OP	17.78	03-06-2008		2	297
2	2 170					100	EA	39	100	EA	Dist OP	140...	03-06-2008		1300	4633
2	2 11/270					50	EA	21	50	EA	Dist OP	91.24	03-19-2008		N/A	N/A
2	70-TB38					50	EA	5	10	EA	Calc OP	173...	03-06-2008		25	275
2	50GR-TBH0					25	EA	8	12	EA	Calc OP	177...	02-12-2008		25	106
1	125ATK					50	EA	0	44	EA	Calc OP	508...	02-08-2008		0	51
1	2-1FCW6					100	EA	0	3	EA	Dist OP	409...	02-12-2008		0	2500
1	27MXTY					500	EA	0	500	EA	Dist OP	147...	03-06-2008		N/A	N/A
1	50GR-TBH1					10	EA	0	3	EA	Dist OP	121...	03-11-2008		N/A	N/A
1	C172	802060029...	4-11/16 ROUND SLV PL...	A	5	100	EA	0	60	EA	Calc OP	134...	03-24-2008		0	75
1	5353	802060018...	2/3" INSUL RIGHT ANG...	A	4	40	EA	2	37	EA	Calc OP	279...	03-24-2008		2	51
1	2SL14	802060003...	2/3" JAM NUT, SEALING	A	10	100	EA	10	100	EA	Dist OP	90.79	08-06-2007		142	1571

**Total Value** 10680.29      **Total Weight** 104961.70      **Total Items** 72      **Total Units** 6483      **Row 1 of 72**

In addition to this enhancement, a change has been made to the PO Worksheet Details page to allow for additional Item Detail related information to be available more quickly during the order review process. To allow Planners to gather more information about an item when Alerts are present, the PA and PO History for an item is now available by simply right clicking on the item and making the selection appropriate to the data you want to see, as shown in the screen shot below.

Order	Item	View	Sort
<b>Location</b> World Parts - CDC (90008025) <b>PO Worksheet Name</b> STOCK			

AC	Supp Cat	Dist UPC	Description	Use...	PG	OQ	OQ U...	NQA	OP	Dst ...	OP Type	Ext Val	Last PA	Las...	Pre Da...	Post D...
1	LBA-1/2CI	80206004721	SCREW-CAP			300	EA	-39	143	EA	Calc OP	790....	03-25-2008	03...	0	32
1	1544CI	80206004623	LOCK-RING			10000	EA	12...	13...	EA	Calc OP	414....	03-04-2008	03...	17	32
0	1724CI	80206004631	PIN-SPRING-GUID			100	EA	27	66	EA	Calc OP	113....	03-25-2008	03...	8	41
0	LBA-1 1/4CI	80206004720	SCREW-CALIPER	A	8	40	EA	13	21	EA	Calc OP	290....	03-25-2008	03...	13	54

Both windows can be viewed at the same time and will refresh each time the PA History or PO History is selected for a new item. The PA History window will be sorted with dates in descending order, in

the same manor as it shows from the Item Details screen. The screen shot below shows what this pop-up might look like:

PA Reporting Date	Item Status	Item Status Ovr'd	Qty On Hand	Qty Comm't'd To Sale	Qty Dmg'd	Qty Rsv'd	Qty on Back Order	Qty on Order	Qty in Transit	System Qty on Order	System Qty in Transit	Qty Last Rec'd	Qty X-fer'd	Qty Sold	NQA
01/29/08	A		59	98	0	0	0	0	0	0	0	0	0	73	-39
01/28/08	A		132	160	0	0	0	0	0	0	0	0	0	30	-28
01/25/08	A		162	10	0	0	0	0	0	0	0	0	0	5	152
01/24/08	A		167	0	0	0	0	0	0	0	0	0	0	0	167
01/23/08	A		167	0	0	0	0	0	0	0	0	0	0	22	167
01/22/08	A		189	0	0	0	0	0	0	0	0	0	0	4	189
01/21/08	A		193	0	0	0	0	0	0	0	0	0	0	0	193
01/18/08	A		193	0	0	0	0	0	0	0	100	0	0	55	193
01/17/08	A		248	25	0	0	0	0	0	0	100	0	0	0	223

This new pop-up can be very useful in expediting your review of 'Item Not Sold in Recent History' or 'Item Not Reported Since Last Order' Alerts. Perhaps you'll notice a new Customer Commitment that will lead to a sale even though there hasn't been a sale in 6 months. Having this data available to you on the spot saves 'clicks' and can help you quickly move on to the next item up for Alert review.

The PO History (or Order History as it is referenced) will also be sorted in descending date order and will also include dates for which the item was suggested, but not ordered. In this case, the Qty Ordered will show as zero (0) and will be bolded in red. An example of this pop-up is shown below.

PO Number	PO Date	Qty Ordered	Qty Shipped	Qty Received	Order Comments
201088	03/26/08	10000	0	0	
201087	03/24/08	10000	10000	0	
201086	03/21/08	10000	10000	0	
201085	03/19/08	10000	10000	0	
201084	03/17/08	10000	10000	10000	
201083	03/14/08	<b>0</b>	0	0	X-fer from Hamilton

A useful feature of the Order History pop-up, is that it allows you to copy (Ctrl-C or Edit-Copy or right mouse click-Copy) the comments from a previous order (or non-order) and then paste (Ctrl-V) them into the Item Comments right on the PO Worksheet. This functionality is very useful for items with the 'Item Removed From Last Order - Suggested on' Alert. Perhaps the rationale for removing the item last time is that the Buyer agreed to transfer in from another location but never followed up. Or, maybe it was removed due to a Negative on Hand value or 'bad' Min OP value that the Buyer has yet

to 'clean up'. Either way, this new pop-up makes it easier to quickly find the reason and then copy the old comments right back over...allowing you to then simply remove the item from the current day's PO Worksheet. Of course, if you remove items, you'll want to make sure that you send the Buyer the Post Launch Summary – Items Added/Changed/Removed report.

It is our hope that the changes made to the PO Worksheet details screen will help you to better focus on what is 'most' important to you and your business while ultimately leading to greater efficiency.