# View and Acknowledge Planning Schedules and Orders
# Sterling Web Forms

## January 2010

This user guide covers the following topics:

- Access the Inbox

- Form Name

- View and Acknowledge Planning Schedules and Orders

- Planning Schedule

- Ship Schedule

- Replacement Ship Schedules

- Notification of Received Documents

- Sterling Commerce Customer Support

# Access the Inbox

Click on the Inbox link.

# Form Name

The Form Name of each document type reflects different information.  The Form Name of a:

•Planning Schedule is the Release Number

•Purchase Order is the Purchase Order Number

•Ship Schedule is a combination of four pieces of information:

1. Shipping Schedule Issuer Code

2. Ship To Code

3. Ship Date (CCYYMMDD format)

4. Release Number



Sterling Web Forms

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This is your Sterling Web Forms **Inbox**. Forms received from your business partners are displayed below. Click the individual links under **Form Name** to open, read and/or print the selected documents. You can also move forms to your **Trash** folder for deletion by selecting the **Delete forms** button or to your **Archive** folder for filing by selecting the **Archive forms** button.

Click on the column header to sort.

## Inbox

● Delete Forms   ● Archive Forms   ● Check All   ● Clear All   ● Turn Forms   ● Refresh

| Form Name | Company | Form Type | Date Received | Status |
|---|---|---|---|---|
| 7178521878-062629324-20100114-01270047 | Harley Davidson | Ship Schedule | 1/14/2010 3:05:12 PM | Read |
| 7178521878-062629324-20100114-01270046 | Harley Davidson | Ship Schedule | 1/14/2010 3:05:08 PM | Unread |
| 7178521878-062629324-20100114-01270046 | Harley Davidson | Ship Schedule | 1/14/2010 2:47:12 PM | Unread |
| HT657695 | Harley Davidson | Purchase Order | 11/2/2009 8:33:11 AM | Read |
| 2775139 | Harley Davidson | Ship Schedule | 9/22/2009 2:17:50 PM | Read |

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To interpret the Schedule Issuer Code and Ship To codes:

• open the document and reference the Issuer / Buying and Ship To fields; or

•reference Appendix A, Plant – Ship To Location Codes posted in the EDI Standard section on the Electronic Commerce web page on www.h-dsn.com.

## Form Name

7178521878- ◀——— Shipping Schedule Issuer Code

062629324- ◀——— Ship To Code

20100114- ◀——— Ship Date

01270047 ◀——— Release  Number

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# View and Acknowledge Planning Schedules and Orders

Click on the Form Name associated with the document that you want to view.

The selected document will display and an acknowledgement will automatically be sent to H-D.

An order is a Ship Schedule or Purchase Order. Manufacturing plants will send Ship Schedules. P&A and General Merchandise will send Purchase Orders.

## Sterling Web Forms

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To determine the document type, reference the Form Type column.

To determine which documents have been read and unread reference the Status column.

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Manufacturing plants, P&A, and General Merchandise send Planning Schedules to communicate future quantities planned for ordering.

The first time the document displays, Sterling Web Forms will automatically send an acknowledgement to H-D.

If the Material Release issuer is P&A or General Merchandise, the H-D P.O. # field will be blank.  The business will issue a Purchase Order prior to when material is needed.



An ASN can be created by clicking on the **Create Ship Notice from this Planning Schedule** button.

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# Ship Schedule

A ship schedule is sent with the manufacturing plant or the Supplier Direct program requires material to be shipped.

The first time the document displays, Sterling Web Forms will automatically send an acknowledgement to H-D. If the quantity ordered can not be fulfilled, please contact the purchasing representative to discuss.

To determine when to ship the material, reference the Ship Date field.



An ASN can be created by clicking on the **Create Ship Notice from this Ship Schedule** button.

To view this data in Excel, click on the **Create Export File from this Ship Schedule** button, follow the prompts and a *.csv file will be created. Open the file in Excel and format as needed.

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A Purchase Order will be sent when P&A, General Merchandise or MRO requires material to be shipped.

The first time the document displays, Sterling Web Forms will automatically send an acknowledgement to H-D. If the quantity ordered can not be fulfilled, please contact the purchasing representative to discuss.

To determine when the material is needed at the facility, reference the Required Date column.



An ASN can be created by clicking on the **Create Ship Notice from this Purchase Order** button.

## Replacement Ship Schedules

A replacement ship schedule replaces a previously sent ship schedule. A replacement ship schedule is sent when there is a change (i.e. ordered quantity, ship date, etc.) to the original ship schedule. The replacement ship schedule should always be used to fulfill the order or to create the ASN.

Sterling Web Forms manages the replacement process effectively.

•If the previously sent (Original) ship schedule was not opened or has a status of Unread, Web Forms will automatically delete the original ship schedule and save the replacement ship schedule in the Inbox to be opened/read. The user will be unaware of this process

•If the previously sent (Original) ship schedule was opened or has a status of Read, Web Forms will accept the replacement ship schedule. When the replacement ship schedule is opened or read, the below dialog box displays.
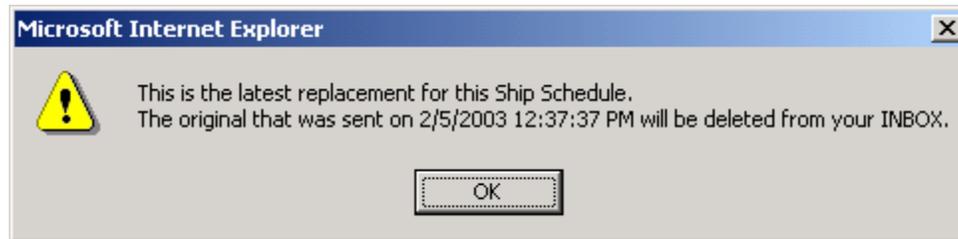


Press the Ok button and Web Forms will automatically delete the previously sent (Original) ship schedule and save and display the replacement ship schedule.

## Notification of Received Documents

Sterling Web Forms has the capability of sending email notifications to specific contacts when documents are added to the Web Forms Inbox.  To set this functionality up, reference the  blue Web Forms menu bar and mouse-over Options and then click on Change Notification Email.

## Sterling Commerce Customer Support

For questions about the Sterling Web Forms product, please call telephone number 1-877-432-4300 or email customer_support@stercomm.com.