i-Global System

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Material Management System User Manual -- Version: 1.02

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About This Manual

This manual has been developed to guide you through the Material Management System of i-Global System with comprehensive, step-by-step method of instruction. This manual was designed in a modular format for the purpose of grouping major topics, and placing emphasis on key product features.

This manual is organized as follows:

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chapter 1</td>
<td>System Overview: Overviews on the Material Management System, highlights features and defines terminology.</td>
</tr>
<tr>
<td>Chapter 2</td>
<td>Master File Setup: Describes procedures how to set up the master records.</td>
</tr>
<tr>
<td>Chapter 3</td>
<td>Material Requirements Planning (MRP): Shows detailed MRP Demand and Supply options and how to select proper process criteria.</td>
</tr>
<tr>
<td>Chapter 4</td>
<td>Inventory Report:</td>
</tr>
<tr>
<td>Chapter 5</td>
<td>Sales Forecast: Describes how to input Sales Forecast for the Material Requirements Planning (MRP) process.</td>
</tr>
<tr>
<td>Chapter 6</td>
<td>Purchase Requisition: Provides operation details to support Back-to-back order materials purchasing mode.</td>
</tr>
<tr>
<td>Chapter 7</td>
<td>Enquiry: Depicts how to enquire necessary information from the system.</td>
</tr>
<tr>
<td>Chapter 8</td>
<td>Report: Gives both operational and analysis report generation for operation and management purposes.</td>
</tr>
<tr>
<td>Chapter 9</td>
<td>Number Prefix: Defines the document number prefix for better control.</td>
</tr>
</tbody>
</table>
Conventions Used in This Manual

The following typeface conventions are used throughout this manual:

**Bold**

Bold text indicates an option to choose or text to type. It usually appears in numbered steps.

*Italics*

Words are italicized for emphasis or to draw your attention to a new term.

*Action ➔ Option Name*

Whenever you see a reference to a menu option, the option is identified using the following notation:

- **Menu Name ➔ Option Name**
- For example, “Type ➔ Create”
## Icon Function

<table>
<thead>
<tr>
<th>Icon Name</th>
<th>Symbol</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active Task</td>
<td><img src="folder.png" alt="Folder" /></td>
<td>To show all active tasks opened in the system, current task is always on the top.</td>
</tr>
<tr>
<td>Add New</td>
<td><img src="addnew.png" alt="AddNew" /></td>
<td>To add a new entry.</td>
</tr>
<tr>
<td>Approval</td>
<td><img src="approval.png" alt="Approval" /></td>
<td>To approve a transaction process.</td>
</tr>
<tr>
<td>Cancel</td>
<td><img src="cancel.png" alt="Cancel" /></td>
<td>To end current process.</td>
</tr>
<tr>
<td>Cancel</td>
<td><img src="cancel.png" alt="Cancel" /></td>
<td>To cancel an entry.</td>
</tr>
<tr>
<td>Confirm</td>
<td><img src="confirm.png" alt="Confirm" /></td>
<td>To confirm an entry.</td>
</tr>
<tr>
<td>Delete</td>
<td><img src="delete.png" alt="Delete" /></td>
<td>To delete a record.</td>
</tr>
<tr>
<td>Delete All</td>
<td><img src="deleteall.png" alt="DeleteALL" /></td>
<td>To delete all records.</td>
</tr>
<tr>
<td>Enquiry</td>
<td><img src="enquiry.png" alt="Enquiry" /></td>
<td>To begin an enquiry process.</td>
</tr>
<tr>
<td>Export</td>
<td><img src="export.png" alt="Export" /></td>
<td>To export data into a specific format file.</td>
</tr>
<tr>
<td>Next</td>
<td><img src="next.png" alt="Next" /></td>
<td>To next record.</td>
</tr>
<tr>
<td>Pop Up</td>
<td><img src="popup.png" alt="Pop Up" /></td>
<td>To display the selection list.</td>
</tr>
<tr>
<td>Preview</td>
<td><img src="preview.png" alt="Preview" /></td>
<td>To preview a retrieved data/report.</td>
</tr>
<tr>
<td>Process</td>
<td><img src="process.png" alt="Process" /></td>
<td>To begin a process.</td>
</tr>
<tr>
<td>Retrieve</td>
<td><img src="retrieve.png" alt="Retrieve" /></td>
<td>To retrieve a selected record.</td>
</tr>
<tr>
<td>Submit</td>
<td><img src="submit.png" alt="Submit" /></td>
<td>To submit an entry.</td>
</tr>
<tr>
<td>Update</td>
<td><img src="update.png" alt="Update" /></td>
<td>To update/amend a record.</td>
</tr>
</tbody>
</table>
1 System Overview

1.1 Introduction

The Material Management System provides different system features to enable material planners to maintain high material availability in a low inventory level environment.

1.2 Material Management Features

Material Requirements Planning (MRP)

MRP establishes and maintains a schedule for the acquisition of components, sub-assemblies, raw materials and/or sub-contracted items needed to produce a product.

MRP is extremely powerful tool. It plans priorities effectively, calculates actual and/or forecasts demand accurately and suggests operation actions to allow better and faster respond to the market place, to reduce inventory as well as to improve productivity.

Safety Stock Report

System allows safety stock level input in the Item Code master for each item. Report can be generated for items that their stock levels reach the safety stock level.

Slow Moving Report

System may generate Slow Moving Report for Items with slow movement within specific time period.
Inactive Report

System may generate Inactive Report for Items with no movement within a specific time period.

Expiration Report

System may generate Expiration Report for Items with expiration date at a specific time.
1.3 Terminology

Terms and meanings of material management are described as follows:

<table>
<thead>
<tr>
<th>Terms</th>
<th>Definitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alternate Item</td>
<td>Items are approved for substitution when the primary item is not available.</td>
</tr>
<tr>
<td>Bills of Material (BOM)</td>
<td>Listing of all subassemblies, components, and raw materials with quantity per that are constituted in a parent item.</td>
</tr>
<tr>
<td>Component</td>
<td>Item used to manufacture another item.</td>
</tr>
<tr>
<td>Engineering Change Notice</td>
<td>Formal notification specifying an engineering change.</td>
</tr>
<tr>
<td>Forecast</td>
<td>Estimate of future demand.</td>
</tr>
<tr>
<td>Gross Requirements</td>
<td>Total independent and dependent demand for an item or assembly within a time period.</td>
</tr>
<tr>
<td>Inventory Item</td>
<td>Purchased or manufactured item that is tracked by Inventory, such as raw materials, components, sub-assemblies, and finished goods.</td>
</tr>
<tr>
<td>Item</td>
<td>Any manufactured or purchased part.</td>
</tr>
<tr>
<td>Item Number</td>
<td>An alphanumeric code that identifies an item. Every item must have a unique item number.</td>
</tr>
<tr>
<td>Make-to-Order</td>
<td>Products are manufactured according to customer order.</td>
</tr>
<tr>
<td>Make-to-Stock</td>
<td>Products are manufactured according to forecast for stock.</td>
</tr>
<tr>
<td>MRP</td>
<td>Material Requirements Planning—Set of techniques using bill of material, inventory data, and master production schedule, to calculate material requirements.</td>
</tr>
<tr>
<td>Terms</td>
<td>Definitions</td>
</tr>
<tr>
<td>-------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>On-Hand Quantity</td>
<td>A calculated quantity shown in inventory records as being physically in stock.</td>
</tr>
<tr>
<td>Parent</td>
<td>Item made up of one or more component items.</td>
</tr>
<tr>
<td>Pegging</td>
<td>Ability to identify source of demand for an item.</td>
</tr>
<tr>
<td>Phantom Item</td>
<td>Term used to describe transient or non-stocked items.</td>
</tr>
<tr>
<td>Planned Purchase Order</td>
<td>System suggested purchase orders not yet accepted by the planner.</td>
</tr>
<tr>
<td>(PPO)</td>
<td></td>
</tr>
<tr>
<td>Quantity-per</td>
<td>Quantity of an item is required to manufacture the parent item.</td>
</tr>
<tr>
<td>Routings</td>
<td>Set of information describing an item manufacturing method and sequence.</td>
</tr>
<tr>
<td>Safety Stock</td>
<td>Additional inventory planned as a safeguard.</td>
</tr>
<tr>
<td>Sales Plan</td>
<td>Overall sales level expected to be achieved.</td>
</tr>
<tr>
<td>Samples</td>
<td>A portion of a lot taken for evaluation purposes.</td>
</tr>
<tr>
<td>Scheduled Receipts</td>
<td>Manufacturing orders, purchase orders, or firm planned orders with an open balance due in a particular time period.</td>
</tr>
<tr>
<td>Scrap Rate</td>
<td>Anticipated loss within manufacture of product.</td>
</tr>
<tr>
<td>Setup Time</td>
<td>Work required to change a specific machine, resource, work center, or production line from one product to another.</td>
</tr>
</tbody>
</table>
2 Master File

2.1 Item File

Update an Item

Steps:

1) In Master File, click Item File.

2) Click the Pop Up button \( \ldots \) from the Item No. field \( \rightarrow \) double click the Item No. you want to update.

3) Click Update button.

4) Amend the data and then click Confirm button to confirm the input.
2.2 Customer Master

Create a new Customer Code

Steps:

1) In Master File, click Customer Master.

2) Click AddNew button.

3) Type Customer Code, Customer Name (English), Customer Name (Chinese), Address, E-mail Address, Contact Person, Telephone No., Fax No. and Exchange Rate.

4) Click the Pop Up button from the following fields to select the data:

<table>
<thead>
<tr>
<th>Buyer</th>
<th>Currency</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Shipment Method</th>
<th>Delivery Term</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Delivery-To</td>
<td>Forwarder Code</td>
</tr>
<tr>
<td>------------</td>
<td>---------------</td>
</tr>
<tr>
<td>Payment Term</td>
<td></td>
</tr>
</tbody>
</table>

5) Click **Confirm** button.

**Search a Customer Code**

**Method 1:**

Steps:

1) Select a **Field** from the **Pull Down menu** type the search criteria.

2) Click **Search** button.

**Method 2:**

Step:

1) Click **the first page** button to find the records in the first page of the **Customer Code Table**; or

2) Click **the previous page** button to find the record in the previous page of the **Customer Code Table**; or

3) Click **the next page** button to find the record in the next page of the **Customer Code Table**; or

4) Click **the last page** button to find the record in the last page of the **Customer Code Table**.
2.3 Vendor Master

Create a new Vendor

Steps:

1) In Master File, click Vendor Master.

2) Click \textbf{Add New} button.

3) Type \textbf{Vendor Code}, \textbf{Vendor Name (English)}, \textbf{Vendor Name (Chinese)}, \textbf{Name (Abbreviate)}, \textbf{Address}, \textbf{E-mail Address}, \textbf{Contact Person}, \textbf{Telephone No.} and \textbf{Fax No.} of the new \textit{Vendor Code}.

4) Click the \textbf{Pop Up} button \ldots{} from the \textbf{Buyer} field \rightarrow double click the \textbf{Buyer} you want to choose.
5) Click the **Pop Up** button from the **Ship Via** field → double click the **Ship Via** you want to choose.

6) Click the **Pop Up** button from the **Delivery To** field → double click the **Delivery To** you want to choose.

7) Click the **Pop Up** button from the **Delivery Term** field → double click the **Delivery Term** you want to choose.

8) Click the **Pop Up** button from the **Payment Term** field → double click the **Payment Term** you want to choose.

9) Type **Allowance** and/or **Maximum Allowance**.

10) Click the **Pop Up** button from the **Currency** field → double click the **Currency** you want to choose.

11) Click **Confirm** button to confirm the input.
2.4 Vendor Item Master

First of all, you need to read a Vendor Code before you create, update or delete an Item Number of the selected Vendor Code.

Read a Vendor Code

Steps:

1) In Master File, click Vendor Item Master.

2) Click the Pop Up button from the Vendor Code field → double click the Vendor Code you want to choose → click Read button.
Create a new Item Number

Steps:

1) After you read the Vendor Code, click the AddNew button.

2) Click the Pop Up button from the Item No. field → double click the Item No. you want to choose.

3) Click the Pop Up button from the UOM field → double click the UOM you want to choose.

4) Type Vendor Item, Item Description, Purchase L/T, Minimum Order and Pack Qty.

5) Click the Confirm button to confirm the input.

Search an Item No.

Method 1:

Steps:

1) Select a Field from the Pull Down menu → type the search criteria.

2) Click Search button.

Method 2:

Step:

1) Click the first page button to find the records in the first page of the Item No. Table; or

2) Click the previous page button to find the record in the previous page of the Item No. Table; or
3) Click the **next page** button to find the record in the next page of the *Item No. Table*; or

4) Click the **last page** button to find the record in the last page of the *Item No. Table*.

**Update an Item Number**

Steps:

1) After you read the *Vendor Code*, click the **Update** button on the left of the *Item No.* you want to update.

2) Amend the data and then click the **Confirm** button to confirm the input.

**Delete an Item Number**

Steps:

1) After you read the *Vendor Code*, click the **Delete** button on the left of the *Item No.* you want to delete.

2) Click the **Confirm** button to confirm the process.

**Delete all Item Numbers**

Steps:

1) After you read the *Vendor Code*, click the **Delete ALL** button to delete all *Item Numbers*.

2) Click **Yes** to delete all records.
2.5 Ship-To Master

Create a new Delivery To

Steps:

1) In Master File, click Ship-To Master.

2) Click AddNew button.

3) Type Delivery-To, Description, Address, E-Mail Address, Contact Person, Telephone No. and Fax No.

4) Click Confirm button.

Search a Delivery To

Method 1:
Steps:

1) Select a **Field** from the **Pull Down** menu→ type the search criteria.

2) Click **Search** button.

**Method 2:**

Step:

1) Click the **first page** button to find the records in the first page of the *Delivery To Table*; or

2) Click the **previous page** button to find the record in the previous page of the *Delivery To Table*; or

3) Click the **next page** button to find the record in the next page of the *Delivery To Table*; or

4) Click the **last page** button to find the record in the last page of the *Delivery To Table*.

**Update a Delivery To**

Steps:

1) To update an existing *Delivery To*, click the **Pick** button on the left of the *Delivery To* you want to update. (or use the search function to search a *Delivery To*)

2) Click **Update** button and then amend the data.

3) Click **Confirm** button to confirm the input.

**Delete a Delivery To**

Steps:
1) To delete an existing Delivery To, click the **Pick** button on the left of the Delivery To you want to delete → click **Delete** button. (or use the search function to search a Delivery To)

2) Click **OK** button to confirm the process.
2.6 Supply Tolerance Code

Create a new Supply Tolerance

Steps:

1) In Master File, click Supply Tolerance Code.

2) Click AddNew button.

3) Type Supply Tolerance Code, Day Delay and Day Expedite.

4) Click Confirm button to confirm the input.
Search a Supply Tolerance Code

Method 1:

Steps:

1) Select a Field from the Pull Down menu → type the search criteria.

2) Click Search button.

Method 2:

Step:

1) Click the first page button to find the records in the first page of the Supply Tolerance Code Table; or

2) Click the previous page button to find the record in the previous page of the Supply Tolerance Code Table; or

3) Click the next page button to find the record in the next page of the Supply Tolerance Code Table; or

4) Click the last page button to find the record in the last page of the Supply Tolerance Code Table.

Update a Supply Tolerance Code

Steps:

1) To update an existing Supply Tolerance, click the Pick button on the left of the Supply Tolerance Code you want to update. (or use the search function to search a Supply Tolerance Code)

2) Click Update button and then amend the data.

3) Click Confirm button to confirm the input.
Delete a Supply Tolerance Code

Steps:

1) To delete an existing Supply Tolerance, click the Pick button on the left of the Supply Tolerance Code you want to delete (or use the search function to search a Supply Tolerance Code).

2) Click the Delete button and then click OK button to delete the record.
2.7 Buyer File

Create a new Buyer

Steps:

1) In Master File, click Buyer File.

2) Click AddNew button.

3) Type Buyer and Buyer Name ➔ click Confirm.

Search a Buyer

Method 1:

Steps:

1) Select a Field from the Pull Down menu ➔ type the search criteria.

2) Click Search button.
Method 2:

Step:

1) Click the first page button to find the records in the first page of the Buyer Table; or
2) Click the previous page button to find the record in the previous page of the Buyer Table; or
3) Click the next page button to find the record in the next page of the Buyer Table; or
4) Click the last page button to find the record in the last page of the Buyer Table.

Update a Buyer

Steps:

1) To update an existing Buyer, click the Pick button on the left of the Buyer you want to update. (or use the search function to search a Buyer)
2) Click Update button and then amend the data.
3) Click Confirm button to confirm the input.

Delete a Buyer

Steps:

1) To delete an existing Buyer, click the Pick button on the left of the Buyer you want to delete (or use the search function to search a Buyer)
2) Click Delete button and then click OK button to delete the record.
2.8 **Region Code Master**

*Create a new Region Code*

Steps:

1) In **Master File**, click **Region Code Master**.

2) Type **Region Code** → press **Tab**.

3) Type **Region Description** → click **Confirm** button.

*Search a Region Code*

**Method 1:**

Steps:

1) Select a **Field** from the **Pull Down** menu → type the search criteria.
2) Click Search button.

Method 2:

Step:

1) Click the first page button to find the records in the first page of the Region Code Table; or

2) Click the previous page button to find the record in the previous page of the Region Code Table; or

3) Click the next page button to find the record in the next page of the Region Code Table; or

4) Click the last page button to find the record in the last page of the Region Code Table.

Update a Region Code

Steps:

1) To update an existing Region Code, click the Pick button on the left of the Region Code you want to update. (or use the search function to search a Region Code)

2) Click Update button and then amend the data.

3) Click Confirm button to confirm the input.

Delete a Region Code

Steps:

1) To delete an existing Region Code, click the Pick button on the left of the Region Code you want to delete → click Delete button. (or use the search function to search a Region Code)

2) Click OK button to confirm the process.
2.9 Salesman Master

*Create a new Buyer*

Steps:

1) In Master File, click **Salesman Master**.

2) Click **AddNew** button.

3) Type **Buyer** → press Tab.

4) Type **Buyer Name** → click **Confirm** button.

*Search a Buyer*

Method 1:

Steps:
Material Management System

1) Select a Field from the Pull Down menu → type the search criteria.

2) Click Search button.

**Method 2:**

Step:

1) Click the first page button to find the records in the first page of the Buyer Table; or

2) Click the previous page button to find the record in the previous page of the Buyer Table; or

3) Click the next page button to find the record in the next page of the Buyer Table; or

4) Click the last page button to find the record in the last page of the Buyer Table.

**Update a Buyer**

Steps:

1) To Update an existing Buyer, click the Pick button on the left of the Buyer you want to update. (or use the search function to search a Buyer)

2) Click Update button and then amend the data.

3) Click Confirm button to confirm the input.

**Delete a Buyer**

Steps:

1) To delete an existing Buyer, click the Pick button on the left of the Buyer you want to delete → click Delete button. (or use the search function to search an Buyer)

2) Click OK button to confirm the process.
2.10 Payment Type Master

*Create a new Payment Term*

Steps:

1) In **Master File**, click **Payment Type Master**.

2) Click **AddNew** button.

3) Type **Payment Term** → press **Tab**.

4) Type **Description** → press **Tab**.

5) Type **Credit Days** → press **Tab**.

6) Tick the **After Monthly Statement** check box if required.

7) Click **Confirm** button.
**Search an Payment Term**

**Method 1:**

Steps:

1) Select a **Field** from the **Pull Down** menu → type the search criteria.
2) Click **Search** button.

**Method 2:**

Step:

1) Click the **first page** button to find the records in the first page of the **Payment Term Table**; or
2) Click the **previous page** button to find the record in the previous page of the **Payment Term Table**; or
3) Click the **next page** button to find the record in the next page of the **Payment Term Table**; or
4) Click the **last page** button to find the record in the last page of the **Payment Term Table**.

**Update Payment Term**

Steps:

1) To Update an existing **Payment Term**, click the **Pick** button on the left of the **Payment Term** you want to update. (or use the search function to search an **Payment Term**) 
2) Click **Update** button and then amend the data.
3) Click **Confirm** button to confirm the input.
**Delete Payment Term**

Steps:

1) To delete an existing Payment Term, click the **Pick** button on the left of the Payment Term you want to delete → click **Delete** button. (or use the search function to search an Payment Term )

2) Click **OK** button to confirm the process.
2.11 Ship Via Master

Create a new Ship Via

Steps:

1) In Master File, click Ship Via Master.

2) Click AddNew button.

3) Type Ship Via and Ship Via Name ➔ click Confirm button.

Search a Ship Via

Method 1:

Steps:

1) Select a Field from the Pull Down menu ➔ type the search criteria.
2) Click **Search** button.

**Method 2:**

Step:

1) Click **the first page** button to find the records in the first page of the *Ship Via Table*; or

2) Click **the previous page** button to find the record in the previous page of the *Ship Via Table*; or

3) Click **the next page** button to find the record in the next page of the *Ship Via Table*; or

4) Click **the last page** button to find the record in the last page of the *Ship Via Table*.

**Update a Ship Via**

Steps:

1) To Update an existing *Ship Via*, click the **Pick** button on the left of the *Ship Via* you want to update. (or use the search function to search a *Ship Via*)

2) Click **Update** button and then amend the data.

3) Click **Confirm** button to confirm the input

**Delete a Ship Via**

Steps:

1) To delete an existing *Ship Via*, click the **Pick** button on the left of the *Ship Via* you want to delete. (or use the search function to search a *Ship Via*)

2) Click **OK** button to confirm the process.
2.12 Delivery Term Master

Create a new Delivery Term

Steps:

1) In Master File, click Delivery Term Master.

2) Click AddNew button.

3) Type Delivery Term and Description → click Confirm button.

Search a Delivery Term

Method 1:

Steps:

1) Select a Field from the Pull Down menu→ type the search criteria.

2) Click Search button.
Method 2:

Step:

1) Click the first page button to find the records in the first page of the Delivery Term Table; or
2) Click the previous page button to find the record in the previous page of the Delivery Term Table; or
3) Click the next page button to find the record in the next page of the Delivery Term Table; or
4) Click the last page button to find the record in the last page of the Delivery Term Table.

Update a Delivery Term

Steps:

1) To update an existing Delivery Term, click the Pick button on the left of the Delivery Term you want to update. (or use the search function to search an Delivery Term )
2) Click Update button and then amend the data.
3) Click Confirm button to confirm the input.

Delete a Delivery Term

Steps:

1) To delete an existing Delivery Term, click the Pick button on the left of the Delivery Term you want to delete → click Delete button. (or use the search function to search an Delivery Term )
2) Click OK button to confirm the process.
2.13 Currency Master

*Create a new Currency*

Steps:

1) In **Master File**, click **Currency Master**.

2) Click **AddNew** button.

3) Type **Currency**, **Exchange Rate** and **Description**.

4) Click **Confirm** button.
**Search a Currency**

Method 1:

Steps:

1) Select a **Field** from the **Pull Down** menu → type the search criteria.

2) Click **Search** button.

Method 2:

Step:

1) Click the **first page** button to find the records in the first page of the **Currency Table**; or

2) Click the **previous page** button to find the record in the previous page of the **Currency Table**; or

3) Click the **next page** button to find the record in the next page of the **Currency Table**; or

4) Click the **last page** button to find the record in the last page of the **Currency Table**.

**Update a Currency**

Steps:

1) To Update an existing **Currency**, click the **Pick** button on the left of the **Currency** you want to update. (or use the search function to search a **Currency**)

2) Click **Update** button and then amend the data.

3) Click **Confirm** button to confirm the input.


**Delete a Currency**

Steps:

1) To delete an existing *Currency*, click the **Pick** button on the left of the *Currency* you want to delete. (or use the search function to search a *Currency*)

2) Click **OK** button to confirm the process.
3 Material Requirements Planning (MRP)

3.1 MRP Generation

*Generate a MRP Report*

Steps:

1. In M.R.P., click MRP Generation.
2. Type From/To Company Code, click Pop Up button \( \text{to choose the Project No.} \)
3. Type From/To Site Code, click Pop Up button \( \text{to choose the Project No.} \)
4. Type From/To Project No., click Pop Up button \( \text{to choose the Project No.} \)
5. Type From/To Category Code, click Pop Up button \( \text{to choose the Project No.} \)
6. Type From/To Item No., click Pop Up button \( \text{to choose the Project No.} \)
7. Type Start Date if required.
8) Type From/To Item No. or click Pop Up button ⋮ to choose the item no.

9) Type Shortage if required.

10) Type From/To Category or click Pop Up button ⋮ to choose the category code.

11) Type Off-Set Day if required.

12) Tick PPO if required.

13) Type PPO No. or click Pop Up button ⋮ to choose the Plan P/O No.

14) Type Company Code or click Pop Up button ⋮ to choose the Company Code.

15) Type Group Day if required.

16) Tick Demand Traceability and/or Rescheduling if required.

17) Type Up To Date if required.

18) Click Submit button.
3.2 MRP Report

Submit a MRP Report

Steps:

1) In M.R.P., click MRP Report.

2) Type From/To Project No. or click Pop Up button to choose the Project No.

3) Type Start Date if required.

4) Type From/To Item No. or click Pop Up button to choose the item no.

5) Type Shortage if required.

6) Type From/To Category or click Pop Up button to choose the category code.

7) Type Off-Set Day if required.
8) Tick PPO if required.

9) Type PPO No. or click Pop Up button to choose the Plan P/O No.

10) Type Company Code or click Pop Up button to choose the Company Code.

11) Type Group Day if required.

12) Tick Demand Traceability and/or Rescheduling if required.

13) Type Up To Date if required.

14) Click Submit button.
3.3 **M.R.D Detail Report**

*Preview a MRD Detail Report*

Steps:

1) In **M.R.P.**, click **MRD Detail Report**.

2) Type From/To Item No., Project No., Category Code, Handler or click Pop Up button to choose.

3) Click **Preview** button to preview and/or print the report.
3.4 MRP Header Report

Preview a MRP Header Report

Steps:

1) In MRP, click MRP Header Report.

2) Click Preview button to preview and/or print the report.
3.5 M.R.P Summary

Steps:

1) In MRP, click **MRP Summary**.

2) Type From/To Item No., Project No., Category Code, Handler or click Pop Up button ⋮ to choose.

3) Click **Preview** button to preview and/or print the report.
3.6 Demand Traceability

**Preview a Demand Traceability**

Steps:

1) In MRP, click **Demand Traceability**.

2) Click **Preview** button to preview and/or print the report.
3.7 **Suggest Schedule**

Steps:

1) In M.R.P., click **Suggest Schedule**

2) Type From/To Item No., Project No., Category Code, Handler or click Pop Up button to choose.

3) Click **Preview** button to preview and/or print the report.
3.8 Material Requirement Distribution Report

*Preview a Material Requirement Distribution Report*

Steps:

1) In MRP, click **Material Requirement Distribution Report**.

2) Click **Preview** button to preview and/or print the report.
3.9 MRD Detail Report (ALT Item)

Steps:

1) In MRP, click Material Requirement Distribution Detail Report.

2) Click button to preview and/or print the report.
3.10 M.R.B Color Size Report

Search a **M.R.B Color Size Report** to preview

Steps:

1) In **M.R.P.**, click **M.R.B Color Size Report**.

2) Type From/To Item No., Project No., Category Code, Handler or click Pop Up button to choose.

3) Click **Preview** button to preview and/or print the report.
3.11 Plan P/O Report

Preview a Plan P/O Report

Steps:

1) In MRP, click Plan P/O Report.

2) Type PPO No. or click Pop Up button to choose the PPO No.

3) Click button to preview and/or print the report.
3.12 Supply Reschedule

*Preview a Supply Reschedule*

**Steps:**

1) In MRP, click **Supply Reschedule**.

2) Click **preview** button to preview and/or print the report.
3.13 Plan Work Order Report

Preview a Plan Work Order Report

Steps:

1) In MRP, click Plan Work Order Report.

2) Click Preview button to preview and/or print the report.
4 Inventory Report

4.1 Detail Inventory Report

*Preview an Detail Inventory Report*

Steps:

1) In **Detail Inventory Report**, Type the information → Click **Search** button.

2) Click **Preview** button to preview and/or print the report.
4.2 Summary Inventory Report

Preview an Summary Inventory Report

Steps:

1) In Summary Inventory Report, Type the information → Click Search button.

2) Click Preview button to preview and/or print the report.
4.3 Part Movement Report

**Preview a Part Movement Report**

Steps:

1) In *Summary Inventory Report*, type the information \( \rightarrow \) Click **Search** button.

2) Click **Preview** button to preview and/or print the report.
4.4 Part Summary Inventory Report

**Preview a Summary Inventory Report**

Steps:

1) In *Summary Inventory Report*, Type the information → Click **Search** button.

2) Click **Preview** button to preview and/or print the report.
5 Sales Forecast

5.1 Sales Forecast Maintenance

a) Master File

Create a Sales Forecast in Master File

Steps:

1) In Sales Forecast, click S/F Maintenance.

2) Click AddNew button.

3) Type S/F No. ➔ press Tab.

4) Click the Pop Up button from the Customer Code field ➔ double click the Customer Code you want to choose.

5) Type Request Date ➔ press Tab.

6) Click the Pop Up button from the Company Code field ➔ double click the Company Code you want to choose.
7) Click the Pop Up button from the Region Code field → double click the Region Code you want to choose.

8) Click the Pop Up button from the Currency field → double click the Currency you want to choose.

9) Click the Pop Up button from the Salesman field → double click the Salesman you want to choose.

10) Type Exchange Rate → press Tab.

11) Click the Pop Up button from the Delivery To field → double click the Delivery To you want to choose.

12) Type Remark if required.

13) Press Confirm button.

Search a Sales Forecast No.

Method 1:

Steps:

1) Select a Field from the Pull Down menu → type the search criteria.

2) Click Search button.

Method 2:

Step:

1) Click the first page button to find the records in the first page of the S/F No. Table; or

2) Click the previous page button to find the record in the previous page of the S/F No. Table; or

3) Click the next page button to find the record in the next page of the S/F No. Table; or

4) Click the last page button to find the record in the last page of the S/F No. Table.

Update a Sales Forecast in Master File

Steps:
1) To Update an existing Sales Forecast, click the Pick button on the left of the S/F No. you want to update. (or use the search function to search a S/F No.)

2) Click Update button and then amend the data.

3) Click Confirm button to confirm the input.

**Delete a Sales Forecast in Master File**

Steps:

1) To delete an existing Sales Forecast, click the Pick button on the left of the S/F No. you want to delete ➔ click Delete button. (or use the search function to search a S/F No.)

2) Click OK button to confirm the process.

**Print a Sales Forecast**

1) To print a Sales Forecast, click the Pick button on the left of the S/F No. you want to print ➔ click Print button to print the Sales Forecast.
Approve a Sales Forecast

Steps:

1) To approve a Sales Forecast, click the Pick button on the left of the S/F No. you want to approve → click Approval button to approve the Sales Forecast.
b) Detail File

*Add detail information in Sales Forecast*

Steps:

1) In *Sales Forecast*, click *S/F Maintenance*.

2) Click *Detail File*.

3) Click *Add New* button.

4) Click the *Pop Up* button from the *Item No.* field → double click the *Item No.* you want to choose.

5) Click the *Pop Up* button from the *Region Code* field → double click the *Region Code* you want to choose.

6) Type *Req Qty, Request Date* and *Unit Price* → press Tab.

7) Click the *Pop Up* button from the *Work Centre* field → double click the *Work Centre* you want to choose.

8) Click the *Pop Up* button from the *Purchase Type* field → double click the *Purchase Type* you want to choose.

9) Type *Remark* and/or Tick *Exposure* check box if required.

10) Click *Confirm* button.
Search a Sales Forecast

Method 1:
Steps:
1) Select a Field from the Pull Down menu → type the search criteria.
2) Click Search button.

Method 2:
Step:
1) Click the first page button to find the records in the first page of the S/F Line Table; or
2) Click the previous page button to find the record in the previous page of the S/F Line Table; or
3) Click the next page button to find the record in the next page of the S/F Line Table; or
4) Click the last page button to find the record in the last page of the S/F Line Table.

Update detail information in Sales Forecast
Steps:
1) In Sales Forecast, click S/F Maintenance.
2) Click Detail File.
3) Click the Pick button on the left of the S/F Line you want to update. (or use the search function to search a S/F Line)
4) Click Update button and then amend the data.
5) Click Confirm button to confirm the input.
**Delete detail information in Sales Forecast**

Steps:

1) In **Sales Forecast**, click **S/F Maintenance**.

2) Click **Detail File**.

3) Click the **Pick** button on the left of the **S/F Line** you want to delete → click **Delete** button. (or use the search function to search a **S/F Line**.)

4) Click **OK** button to confirm the process.
5.2 Sales Forecast Approval

Approve a Sales Forecast

Steps:

1) In Sales Forecast, click S/F Approval.

2) Click the Pick button on the left of the S/F No. that you want to approve.

3) Click Approval button to approve the Sales Forecast.
6 Purchase Requisition

6.1 Planned Purchase Order Generation

Generate a Planned Purchase Order

Steps:

1) In Purchase Requisition, click PPO Generation.

2) Click the Pop Up button from the Plan P/O Prefix field → double click the Plan P/O Prefix you want to choose → press Tab.

3) Click the Pop Up button from the Company Code field → double click the Company Code you want to choose → press Tab.

4) In Purchase Requisition Range, click the Pop Up button from the Range From/To Company Code field → double click the Company Code you want to choose.

5) Click the Pop Up button from the Range From/To Item No. field → double click the Item No you want to choose.

6) Type Range From/To P/R Date.
7) Click the Pop Up button from the Range From/To Category Code field → double click the Category Code you want to choose.

8) Click the Pop Up button from the Range From/To Work Centre field → double click the Work Centre you want to choose.

9) Click the Pop Up button from the Range From/To S/O No. field → double click the S/O No. you want to choose.

10) Click the Pop Up button from the Range From/To P/R No. field → double click the P/R No. you want to choose → press Tab.

11) Type Work Order Date if required.

12) Click button.
First of all, you need to read a Planned Purchase Order Number before you accept or abort a Vendor Code of the selected Planned Purchase Order Number.

**Read a Planned Purchase Order Number**

Steps:

1) In Purchase Requisition, click PPO Amendment.

2) Click the Pop Up button from the PPO No. field → double click the PPO No. you want to choose → click Retrieve button.

**Search a Vendor Code**

**Method 1:**

Steps:

1) Select a Field from the Pull Down menu → type the search criteria.

2) Click Search button.

**Method 2:**
Step:

1) Click the first page button to find the records in the first page of the Vendor Code Table; or
2) Click the previous page button to find the record in the previous page of the Vendor Code Table; or
3) Click the next page button to find the record in the next page of the Vendor Code Table; or
4) Click the last page button to find the record in the last page of the Vendor Code Table.

Update a Planned Purchase Order

Steps:

1) After you read the PPO No., click the Pick button on the left of the Line you want to update. (or use the search function to search a Line)
2) Click Update button and then amend the data.
3) Click Confirm button to confirm the input.

Accept a Vendor Code

Steps:

1) After you read the PPO No., click on the Vendor Code you want to Accept → click Accept button.

Abort a Vendor Code

Steps:

1) After you read the PPO No., click on the Vendor Code you want to Abort → click Abort button.
6.3 Planned Purchase Order Convert to Purchase Order

Convert Planned Purchase Order to Purchase Order

Steps:

1) In Purchase Requisition, click PPO Generation or PPO Amendment → click PPO Convert to P/O.

2) Click the Pop Up button from the PPO No. field → double click the PPO No. you want to choose.

3) Click the Pop Up button from the P/O Prefix field → double click the P/O Prefix you want to choose.

4) Click Confirm button.
6.4 Purchase Requisition Maintenance

Create a new Purchase Requisition in Master File

Steps:

1) In Purchase Requisition, click P/R Maintenance.

2) Click AddNew button.

3) Click the Pop Up button from the P/R Prefix field → double click the P/R Prefix you want to choose.

4) Click the Pop Up button from the Company Code field → double click the Company Code you want to choose.

5) Click the Pop Up button from the Assembly No. field → double click the Item No. you want to choose.

6) Type the P/R Req Date.

7) Click the Pop Up button from the Work Centre field → double click the Work Centre you want to choose.
8) Type the P/R Req Qty.

9) Type Remarks if required.

10) Click Confirm button.

Search a P/R No.

Method 1:

Steps:

1) Select a Field from the Pull Down menu → type the search criteria.

2) Click Search button.

Method 2:

Step:

1) Click the first page button to find the records in the first page of the P/R No. Table; or

2) Click the previous page button to find the record in the previous page of the P/R No. Table; or

3) Click the next page button to find the record in the next page of the P/R No. Table; or

4) Click the last page button to find the record in the last page of the P/R No. Table.

Update a Purchase Requisition in Master File

Steps:

1) To Update an existing P/R No., click the Pick button on the left of the P/R No. you want to update. (or use the search function to search an P/R No.)

2) Click Update button and then amend the data.

3) Click Confirm button to confirm the input.
Delete a Purchase Requisition in Master File

Steps:

1) To delete an existing P/R No., click the Pick button on the left of the P/R No. you want to delete \( \rightarrow \) click Delete button. (or use the search function to search an P/R No. )

2) Click OK button to confirm the process.

Print a Purchase Requisition

Steps:

1) To print a Purchase Requisition, click the Pick button on the left of the P/R No. you want to print \( \rightarrow \) click Print button to print the Purchase Requisition.
b) Detail File

Add detail information in Purchase Requisition

Steps:

1) In Purchase Requisition, click P/R Maintenance.
2) Click Detail File.
3) Click AddNew button.
4) Click the Pop Up button from the Item No. field \(\rightarrow\) double click the Item No. you want to choose.
5) Type Q/P(Inv), P/R Req Qty and P/R Req Date.
6) Click Confirm button to confirm the input.

Search an Assembly No.

Method 1:

Steps:

1) Select a Field from the Pull Down menu \(\rightarrow\) type the search criteria.
2) Click Search button.

Method 2:

Step:

1) Click the first page button to find the records in the first page of the Assembly No. Table; or
2) Click the previous page button to find the record in the previous page of the Assembly No. Table; or
3) Click the next page button to find the record in the next page of the Assembly No. Table; or
4) Click the last page button to find the record in the last page of the Assembly No. Table.
Update detail information in Purchase Requisition

Steps:

1) In Purchase Requisition, click P/R Maintenance.
2) Click Detail File.
3) Click the Pick button on the left of the Assembly No. you want to update. (or use the search function to search an Assembly No.)
4) Click Update button and then amend the data.
5) Click Confirm button to confirm the input.

Delete detail information in Purchase Requisition

Steps:

1) In Purchase Requisition, click P/R Maintenance.
2) Click Detail File.
3) Click the Pick button on the left of the Assembly No. you want to delete. (or use the search function to search an Assembly No.)
4) Click OK button to confirm the process.

Delete all detail information in Purchase Requisition

Steps:

1) In Purchase Requisition, click P/R Maintenance.
2) Click Detail File.
3) Click Delete button to delete all Assembly Numbers of Purchase Requisition.
4) Click OK button to confirm the process.
7 Enquiry

Enquiry can help to retrieve data on screen instantly according to various criteria.

7.1 Item Master Enquiry

Steps:

1) In Enquiry File, click Item Master Enquiry.

2) Click the Pop Up button from the Item No. field → double click the Item No. you want to choose → press Tab.

3) Type From/To Warehouse if required.

4) Type From/To Tran Date if required.

5) Select Options from the Pull Down menu → click button.
7.2 **Vendor Master Enquiry**

Steps:

1) In **Enquiry File**, click **Vendor Master Enquiry**.

2) Click the **Pop Up** button from the **Vendor Code** field → double click the **Vendor Code** you want to choose → press **Tab**.

3) Type **From/To Warehouse** if required.

4) Type **From/To Tran Date** if required.

5) Select **Options** from the **Pull Down** menu → click **Enquiry** button.
7.3 Purchase Order Transaction Enquiry

Steps:

1) **In Enquiry File, click P/O Transaction Enquiry.**

2) **Click the Pop Up button from the P/O No. field → double click the P/O No. you want to choose → press Tab.**

3) **Select Options from the Pull Down menu → click Enquiry button.**
8 Report

All the reports in the Materials Management System can be:

- Enquired
- Retrieved
- Previewed
- Text Searched
- Printed/Faxed/E-mailed
- Exported

The following are the list of reports in the Materials Management System:

a) Master File List
b) Customer List
c) Item Report
d) BOM Report
e) Where Used Report
f) Alternate Item Report
g) Outstanding Purchase Order Report
a) Master File List

Steps:

1) In Report File, click Master File List.

2) Select one of the following Options:
   - Vendor Report
   - Primary Quotation Report
   - Purchase Order Prefix Report
   - Ship-To Report
   - Vendor-Item Report
   - Buyer Report
   - Currency Report
   - Debit / Credit Note No. Prefix

3) e.g. Vendor Report, type From/To Vendor Code or click Pop Up button to choose the Vendor Code.

4) Click Preview button to preview and/or print the report.
b) Customer List

Steps:

1) In Report File, click Customer List.

2) Type From/To Customer Code or click Pop Up button to choose the Customer Code.

3) Click Preview button to preview and/or print the report.
c) Item Report

Steps:

1) In Report File, click Item Report.

2) Type From/To Item No. or click Pop Up button to choose the Item No.

3) Type From/To Category or click Pop Up button to choose the Category Code.

4) Type From/To Description.

5) Select Printing Sequence from Pull Down menu.

6) Click button to preview and/or print the report.
d) BOM Report

Steps:

1) In Report File, click BOM Report.

2) Type From/To Item No. or click Pop Up button to choose the Item No.

3) Select Options from Pull Down menu.

4) Click Preview button to preview and/or print the report.
e) Where Used Report

Steps:


2) Type From/To Item No. or click Pop Up button to choose the Item No.

3) Type From/To Category or click Pop Up button to choose the Category Code.

4) Click button to preview and/or print the report
f) Alternate Item Report

Steps:

1) In Report File, click Alternate Item Report.

2) Type From/To Item No. or Click Pop Up button to choose the Item No.

3) Type From/To Category or Click Pop Up button to choose the Category Code.

4) Click Preview button to preview and/or print the report.
g) O/S P/O Report

Steps:

1) In Report File, click Customer List.

2) Type From/To Assembly No. or click Pop Up button to choose the Assembly No.

3) Type From/To Category or click Pop Up button to choose the Category Code.

4) Type From/To Item No. or click Pop Up button to choose the Item No.

5) Type From/To Require Date.

6) Type From/To P/O No. or click Pop Up button to choose the P/O No.

7) Type From/To P/R No. or click Pop Up button to choose the P/R No.

8) Type From/To Buyer or click Pop Up button to choose the Buyer.

9) Type From/To Vendor Code or click Pop Up button to choose the Vendor Code.

10) Type From/To Company Code or click Pop Up button to choose the Company Code.

11) Select Options from Pull Down menu.

12) Select Printing Sequence from Pull Down menu.
13) Click **Preview** button to preview and/or print the report.
9 Number Prefix

The following are the list of number prefix in the Material Management System:

a) Purchase Requisition Prefix
b) Purchase Requisition Prefix List
c) Sales Forecast Prefix
d) Sales Forecast Prefix List

a) Purchase Requisition Prefix

Create a new Purchase Requisition Prefix

Steps:

1) In Number Prefix, click P/R Prefix.

2) Click AddNew button.

3) Type Prefix, Prefix Description and Initial No.

4) Click Confirm button to confirm the input.
Search a Prefix

Method 1:

Steps:

1) Select a Field from the Pull Down menu type the search criteria.

2) Click Search button.

Method 2:

Step:

1) Click the first page button to find the records in the first page of the Prefix Table; or

2) Click the previous page button to find the record in the previous page of the Prefix Table; or

3) Click the next page button to find the record in the next page of the Prefix Table; or

4) Click the last page button to find the record in the last page of the Prefix Table.

Update a Purchase Requisition Prefix

Steps:

1) To Update an existing Prefix, click the Pick button on the left of the Prefix you want to update. (or use the search function to search a Prefix)

2) Click Update button and then amend the data.

3) Click Confirm button to confirm the input.
Delete a Purchase Requisition Prefix

Steps:

1) To delete an existing Prefix, click the Pick button on the left of the Prefix you want to delete. (or use the search function to search a Prefix)

2) Click OK button to confirm the process.
b) Purchase Requisition Prefix List

*Preview a P/R Prefix List*

Steps:

1) In **Number Prefix**, click **P/R Prefix. List**.

2) Type **From/To P/R Prefix** or click **Pop Up** button to choose the **P/R Prefix**

3) Click **Preview** button to preview and/or print the report.
e) Sales Forecast Prefix

Create a new Sales Forecast Prefix

Steps:

1) In Number Prefix, click S/F Prefix.

2) Click AddNew button.

3) Type Prefix, Prefix Description and Initial No.

4) Click Confirm button to confirm the input.

Update a Sales Forecast Prefix

Steps:

1) To Update an existing Prefix, click the Pick button on the left of the Prefix you want to update. (or use the search function to search a Prefix)

2) Click Update button and then amend the data.

3) Click Confirm button to confirm the input.

Delete a Sales Forecast Prefix

Steps:

1) To delete an existing Prefix, click the Pick button on the left of the Prefix you want to delete. (or use the search function to search a Prefix)

2) Click OK button to confirm the process.
d) Sales Forecast Prefix List

**Preview a S/F Prefix List**

Steps:

1) In **Number Prefix**, click **S/F Prefix List**.

2) Type **From/To Prefix** or click **Pop Up** button to choose the **Prefix**.

3) Click button to preview and/or print the report.