ProcessForce User's Guide

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How to Guide – ProcessForce Supplier Score Card

ProcessForce Supplier Score Card is a reporting function based on the concept of weighted supplier scorecard. It helps to evaluate Suppliers' performance based on information about quality, quantity accuracy and punctuality of deliveries.

On this page:

- <u>Settings</u>
 - <u>General Settings</u>
- Supplier Score Card
 - o <u>Header</u>
 - o <u>Summary</u>
 - o <u>Details</u>
 - <u>Details tab</u>
 Calculation
 - o <u>Notes</u>
 - o <u>Attachment</u>
- Delivery and Quantity calculations on Supplier Score Card is made based on Purchase Order and Goods Receipt PO documents. In order for the function to work properly, a specific Purchase Order and Goods Receipt PO have to be linked. It can be done by creating Goods Receipt PO by using Copy To option on a Purchase Order or linking Purchase Order by Copy From Option on Goods Receipt PO.
- Dates are compared between lines of documents (not document header dates).

1.1 Settings

1.1.1 General Settings

Path

Administration > System Initialization > General Settings > ProcessForce tab > Supplier Score Card tab

<u>BP</u> Budget <u>Services</u>	Display Font & Bkgd Path Inventory I	Resources Cash Flow Cockpit Cost Accounting	essForce Priging Hide Functions
General Inventory	Bill of Materials and Manufacturing Orders	MRP QC Costing Subcontracting	PDC Supplier Score Card
of Complaints of Failed QC Tests of Returns	11.00 No of Time 11.00 No Early 11.00 No Late	11.00 No Equal Quantity 11.00 No Under Quantity 11.00 No Over Quantity	11.00 11.00 12.00
al Percentage	100.00		

Here you can define a number of values connected to Supplier (which have to add up to 100%), which define a rank of specific value. These setting are created based on weighted Supplier scorecard idea.

1.2 Supplier Score Card

Path

- Business Partners > Supplier Score Card
- You can also reach the form for a specific Business Partner from Business Partner form header context menu (available only when BP type is set to Supplier for this Business Partner).

BP Code 📫 🕅	0001	BP Name ABC	Inc		
Configuration No of Days Early 0	No of Days Late	5 Qua	ntity Over % 33	Quantity Under	~ % 12
Summary	Details Notes	Attachments			
Score Card	Weighted Values	Month to Date	Previous Month	Year to Date	Previous Year
Total Weight	100	0	0	4	0
Quality Weight	34	0	0	4	0
Delivery Weight	33	0	0	0	0
Quantity Weight	33	0	0	0	0

1.2.1 Header

Here you can define additional settings for a specific Supplier related to two factors: <u>delivery</u> and <u>quantity</u>.

 No of Days Early and No of Days Late define a period before and after the order date in which delivery is still acceptable,

Example

Order date is 16.11.2016

No of Days Early: 2

No of Days Late: 2

Every delivery before 14.11.2016 will be deemed as early, every delivery after 18.11.2016 will be deemed as late.

 Quantity Over % and Quantity Under % define a range of quantity of delivery that is still acceptable.

Example

Ordered quantity is 100.

Quantity Over %: 10

Quantity Under %: 10

Everything delivery less than 90 will be deemed as too small, everything delivery bigger that 110 will be deemed as too big.

1.2.2 Summary

Weighted Values are the values defined for each individual weights as defined in General Settings e.g. No. of Complaints, No. of Failed QC Tests, No of Returns etc.

Month to Date is the total of transactions for the current month, e.g. if now is 15th October, transactions from 1st October until 15th of October are taken under consideration.

Month to date relates to the weighted values calculated in the current month.

Previous Month relates to the weighted values calculated in the previous month.

Year to Date relates to the total of the each months weighted values to the current month e.g. January to May, where May is the current month

Previous Year relates to the total of each months weighted value for a full 12 month period i.e. January to December.

1.2.3 Details

BP Code	➡ 00001		BP Name	ABC Inc					
Configuration									
No of Days Early	0	No of Days Late	5		Quantity Over 9	6 33	Quantity Ur	nder % 12	
Summ	nary D	Details Not	es Att	achments					
Score Card	Month to Dat	e Weighted Value	Previous Month	Weighted Value	Year to Date	Weighted Value	Previous Year	Weighted Value	
Quality									
No. of Com	plains 0		0		1		0		
No. of Faile	d QC 0		0		0		0		
No. of Retu	ms 0		0		4	4.00	0		
Deliveries									
No. on Time	0		0		0		0		
No. Early	0		0		0		0		
No. Late	0		0		0		0		
Quantity									
No. Equal	0		0		0		0		
No. Over	0		0		0		0		
No. Under	0		0		0		0		

On this tab there are three values from <u>Summary tab</u> broken down into specific weighted score card positions.

All the values in the Details tab are display only, calculated based on specific settings and transactions, e.g. QC Tests, Returns etc.

Details tab Calculation

Note Grade = Amount / Total and Weighted Score = Weight x Grade

Quality	No of	Weighted Value
No. of Complaints	A = Total Number of Complaints (for this supplier)	(A / Total number of Complaints (for all suppliers)) x No of Complaints (value from General Settings)
No. of Failed QC Tests	B = Number of Failed Tests (QC Test has the status = Failed	(B / Total number of QC Tests (Passed + Failed)) x No of Failed QC Tests (value from General Settings)
No. of Returns	C = Number of Returns	(C / Total number of GRPO's) x No of Returns (value from General setting)

Deliveries	No of	Weighted Value
No. On Time	D = Total number of GRPOs where the GRPO Posting Date is = to Purchase Order Delivery Date	(D / Total number of GRPO) x No on Time (value from General setting)
No. Early	E = Total number of GRPOs where the GRPO Posting Date - No of Days Early Value is < than Purchase Order Delivery Date	(E / Total number of GRPO) x No Early (value from General setting)
No. Late	F = Total number of GRPOs where the GRPO Posting Date + No of Days Late Value is > than Purchase Order Delivery Date	(F / Total number of GRPO) x No Late (value from General setting)

Quantity	No of	Weighted Value
No. Equal	G = Total number of GRPO's where the Purchase Order and GRPO quantity are the same	(G / Total number of GRPO) x No Equal (value from General Settings)
No. Over	H = Total number of GRPO where the quantity is > the Purchase Order quantity + Quantity Over %	(H / Total number of GRPO) x No Over (value from General Settings)
No. Under	I = Total number of GRPO where the quantity is < the Purchase Order quantity - Quantity Under %	(I / Total number of GRPO) x No Under (value from General Settings)

1.2.4 Notes

In this form you can put any written notes to be connected to Score Card.

1.2.5 Attachment

Here you can add, display or delete files connected to Score Card.

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