

ZLPIs in SupplyOn Training for Suppliers

Schaeffler Industrial

February 21, 2023



Agenda

1 General information about S&OP and ZLPI

2 Training focus

3 Next steps

You get all information about the S&OP Program on our Supplier Landing Page!

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Supply chain performance program purchasing Industrial

In our Supply Chain Performance Program we want to step-up our end-to-end supply chain performance: from fluctuating forecasts and long lead times to rolling demand plans, confirmed supplier capacity and competitive lead times. A key element is the Sales & Operations Planning (S&OP) project in Schaeffler's Industrial division which requires intensified supplier alignment. With this we are putting the integration, planning and control of the supply chain on a new level and want to realize potential for improvement in our cooperation.

General information



Here you can find:

- Webinars for S&OP
- Communication material
- Information about the Supply Agreement

... and much more!



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New scheduling agreement (ZLPI) for Schaeffler Industrial provides a long-term forecast and longer frozen horizons for suppliers in exchange for delivery line confirmations





Early checking of alternatives (e.g., smoothening of demand peaks over a time period, insourcing) where feasible



"Give-and-take logic": We provide an 18-month forecast & longer frozen horizons and expect reliable confirmations

ZLPI = new supply agreement with confirmation requirement; MRP = Material Requirement Planning



Better transparency in Scheduling due to feedback from suppliers on all ZLPI scheduling agreements (+ purchase orders)



Proactive steering and escalations if deviating supplier confirmations cannot be accepted by Schaeffler

General process: From receiving ZLPIs to confirming scheduling lines

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Receipt of Scheduling Agreements

Check of Feasibility

Confirmation of Scheduling Lines

All scheduling lines of all scheduling agreements need to be reviewed as before. This procedure does not change.

If an **infeasibility** of an already confirmed scheduling line is **detected** by the supplier, an **adjustment of the confirmation** can be made subsequently to indicate bottlenecks early towards Schaeffler. Initially, all scheduling lines need to be confirmed.

When the **ZLPI gets updated**, **only new and changed scheduling lines** need to be confirmed. Reasons for a changed scheduling lines can be the following:

- The horizon of the ZLPI is 18 months. Every month, the 19th month is added.
- Only the first 6 months are on a daily base, month 7-18 are cumulated on a monthly base. Every month, the 7th month is added with detailed scheduling lines.
- In case a deviating confirmation is accepted by Schaeffler, the ZLPI gets adapted to the deviation and therefore the correlating scheduling lines need to be reconfirmed.

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- 2.1 Overview of SupplyOn
- 2.2 Assigning required roles
- 2.3 Accessing scheduling agreements and customizing search and view profiles
- 2.4 Confirm scheduling lines with and without deviations
- 2.5 Download and upload functionality for scheduling agreements
- 2.6 Adjustment or integration of EDI interfaces

3 Next steps

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Overview of SupplyOn web-interface



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Assigning roles via user account settings



Assigning roles via user account settings

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Assigning roles via user account settings

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WebEDISellerDP	not assigned	Access to development parts.		
UwebEDISellerDP_OR	not assigned	Access to development parts. Sending order confirmations to the purchasing company.		
WebEDISellerDTM	assigned	Access to DTM UI for configuration of downloads.		
WebEDISellerDemandReminder	not assigned	Display to demand reminder messages.		
WebEDISellerDemandReminderConf	not assigned	Display and confirm demand reminder messages.		
WebEDISellerFC	not assigned	Access to Forecast Collaboration module. Creating and editing supply plans.		
UWebEDISellerFPA	not assigned	Receiving delivery and transportation data for forwarding agents.		
WebEDISellerFPA_TMS	not assigned	Display due deliveries and create FPA (Transport Management). Execute print functionality for the FPA (Transport Manage	ment) process.	
WebEDISellerFPA_TMSRead	not assigned	Read access to due deliveries and FPA (Transport Management). Execute print function for the FPA (Transport Manageme	ent) process.	
WebEDISellerFinance	not assigned	Access to self billing invoices, invoices, reevaluations, remittance advices and settlement advices.		
U WebEDISellerGRRead	not assigned	Read access to the Goods Receipt screen.		
WebEDISellerIC	not assigned	Access to Issue Center.		
U WebEDISellerKanban	not assigned	Display of Kanbans.		
WebEDISellerLogistics	assigned	Access to logistical processes (requirement instructions, delivery and transport data and stock movements). Self billing invo	Mark these roles (1) and
WebEDISellerOverdueDevAlert	not assigned	Display alerts for overdue and deviating confirmations.		
WebEDISellerPO	assigned	Access to purchase orders.	press "Request" (.2).
WebEDISellerPO_OR	assigned	Access purchase orders and order confirmations.		
WebEDISellerReleases	assigned	Access to delivery instructions and delivery instruction confirmations or delivery instruction acknowledge receipts.		
WebEDISellerSR	assigned	View schedule responses.		
WebEDISellerSR_OR	assigned	Edit schedule responses.		
WebEDISellerStock	not assigned	Viewing stock movements.		
WebEDI_EntryOFServicesPerformed	not assigned	Display and send values for services performed. The purchase order is received via Supply Chain Collaboration.		
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elnv Seller P2P	assigned	Suppliencan create invoices. Procure 2 Pay - based on demand.		
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Training focus/Accessing scheduling agreements and customizing search and view profiles

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Access to ZLPI scheduling agreements and scheduling lines via Supply Chain Collaboration





Access ZLPI scheduling agreements using the tile or menu

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Training focus/Accessing scheduling agreements and customizing search and view profiles

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Creating new customized search profiles

SupplyOn > Supply Chain Collaboration > Delivery Instructions

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Training focus/Accessing scheduling agreements and customizing search and view profiles

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Overview of scheduling lines and access to confirmation view

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Default view for scheduling lines

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Training focus/Accessing scheduling agreements and customizing search and view profiles

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Editing the search profile for easy access to just new and adapted scheduling lines SUGGESTION SUPPLYON SupplyOn Services Vews Administration More V Log Ou Supply Chain Collaboration > Schedule Response Contact | O Help for this page | Print Quick Sear h Advanced Search Hide Sei Delete line Order no. ✓ equal to 0005360707 3 Manage View ✓ 10 Delete line ✓ equal to Delete line Create new Materia equal to 038005786000 Delete line Type ✓ equal to ✓ Delivery Instruction Update Add line | Delete line Status v not equal to Delete Unchanged Search Reset Set as/unset default Schedule Response ✓ Manage **Default View** Reset all Filters Open "Advanced Search". 1 Status Customer cu... Cum. Last Supply date Qty. sup... Last Response Comment ID (Supply) Change 1st Supply date Initial Schaeffler Roma -1200 X 26.03.23 Add line and set "Status not equal to unchanged". Initial Schaeffler Roma 2 -2000 19.04.23 Initial Schaeffler Roma -2000 22.05.23 -2000 Initial Schaeffler Roma 18.09.23 Enter an individual name. 3 Initial Schaeffler Roma. -2000 01.03.24 \square Initial Schaeffler Roma -3000 11.03.24 Initial -4000 01.07.24 Schaeffler Roma Click on "Manage View". 4 -5000 Initial Schaeffler Roma 01.12.24 100 Initial Schaeffler Roma -5891 01.06.25 Click on "Create new". 5 Initially, all scheduling lines have the status "Initial". Once confirmed, scheduling lines are saved by SupplyOn and don't need to be reconfirmed. Therefore, you can filter out all "Unchanged" entries using the advanced search. Select changed rows Split selected row Clear selected planned shipments Adopt Demand Restore original values Save & send Refresh table Upload-Download -9 matches Select all matches Clear selection Entries per page 100 🗸

Training focus/Accessing scheduling agreements and customizing search and view profiles

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Customize the view for scheduling lines

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Agenda

1 General information about S&OP and ZLPI

2 Training focus

- 2.1 Overview of SupplyOn
- 2.2 Assigning required roles
- 2.3 Accessing scheduling agreements and customizing search and view profiles
- 2.4 Confirm scheduling lines with and without deviations
- 2.5 Download and upload functionality for scheduling agreements
- 2.6 Adjustment or integration of EDI interfaces

3 Next steps

Use case 1: Confirm requested quantities and dates Enough capacity for the requested quantities and dates



After checking the raw material, machine capacity and workforce, all components (1.200 & 800) can be made in time (26.03.2023 & 19.04.2023).

ightarrow All requested dates and quantities are feasible.

Training focus/Confirm scheduling lines with and without deviations

SCHAEFFLER

Case 1: Confirm date and quantity as requested (24

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Case 1: Confirm date and quantity as requested (25

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Use case 2: Adjustment of delivery date

Delivery needs to be postponed due to late arrival of raw material



The machine capacity and workforce is enough for the requested quantities (1.000), but the raw material will be available too late to fulfill the requested delivery date (11.04.2024).

→ Requested quantities (1.000) can be made but can only be delivered later than requested (12.04.2024).

Case 2: Confirm with deviating date, but requested quantity (27

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Case 2: Confirm with deviating date, but requested quantity (28

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Training focus/Confirm scheduling lines with and without deviations

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Use case 3: Partial delivery combined with next planned delivery Worker hands in his notice short-term and needs to be replaced



Even with raw material and machine capacity being available, a worker that has quit can only be replaced a week after the requested date. To compensate, people will work overtime.

 \rightarrow The requested date (01.07.2024) will be held for a portion of the delivery (800 instead of 1.000). The missing parts (200) will be delivered with the following delivery (01.12.2024, 1.200 instead of 1.000).

Case 3: Confirm with deviating quantity, but requested date (30

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Case 3: Confirm with deviating quantity, but requested date (31

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Use case 4: Partial delivery with extra delivery Machine capacity is not ready for a peak in demand



While raw material and workforce can be organized for a peak in demand (891), but the machine capacity can not be increased in time to enable the required date (01.06.2025).

→ The requested demand needs to be smoothened out over a period and therefore is split into multiple deliveries towards Schaeffler (500 on 01.06.2025 & 391 on 02.06.2025).

SCHAEFFLER



Case 4: Confirm with split scheduling lines (33

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Case 4: Confirm with split scheduling lines (2/2)

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Agenda

1 General information about S&OP and ZLPI

2 Training focus

- 2.1 Overview of SupplyOn
- 2.2 Assigning required roles
- 2.3 Accessing scheduling agreements and customizing search and view profiles
- 2.4 Confirm scheduling lines with and without deviations
- 2.5 Download and upload functionality for scheduling agreements
- 2.6 Adjustment or integration of EDI interfaces

3 Next steps

Training focus/Download and upload functionality for scheduling agreements

Interface of SupplyOn to download and upload scheduling agreements

Confirming each ZLPI one by one...

2/21/2023



Perform manual feasibility checks without connection to your planning system

... or download multiple ZLPIs to process the data in your system.



Import scheduling lines directly into your planning system

SCHAEFFLER

or

Fill the template with your data from your planning system more easily.

Training for Suppliers | S&OP - Workstream Purchasing | Schaeffler Industrial

Download scheduling agreements Alternative 1: Direct access via Schedule Responses

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Download scheduling agreements Alternative 1: Direct access via Schedule Responses





Download scheduling agreements Alternative 2: Select individual scheduling agreements and customize the search criteria.

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Agenda

1 General information about S&OP and ZLPI

2 Training focus

- 2.1 Overview of SupplyOn
- 2.2 Assigning required roles
- 2.3 Accessing scheduling agreements and customizing search and view profiles
- 2.4 Confirm scheduling lines with and without deviations
- 2.5 Download and upload functionality for scheduling agreements
- 2.6 Adjustment or integration of EDI interfaces

3 Next steps

Training focus/Adjustment or integration of EDI interfaces

Adapting existing EDI interface or new integration \rightarrow Ordering via SupplyOn web-store

SCHAEFFLER

If you want to confirm ZLPI scheduling agreements via an EDI interface, you can order the necessary packages via the SupplyOn web-store.

EO3

Demand Forecast Response

Basic Service Package with limited included service time for Inbound message type

- Agree on service tasks, dates and team
- Message configuration on SupplyOn EDI system
- SupplyOn provides for some message types and customers a self-service test tool to validate message structure for e.g. Invoice or ASN. Per inbound message type one test coupon is included. Each coupon is valid for 90 days (starting from the first test). SupplyOn supports manual error analyses after successful syntax test.
- Alternatively support to meet required SupplyOn and customer data quality level
- Test support for defined use cases
- Go-Live and stabilization phase support
- Handover to SupplyOn operations team
- Language: English (French or German may be offered in some cases)
- Exchange via ticket system or e-mail

Your Connection

Your Customer * Schaeffler Technologies AG & Co. KG

Application *

Supply-Chain-Collaboration (SCC) 🗸 🗸

Message Protocol *
EDIFACT
Quantity

1

Service time included 7,50h

Procedure:

- 1. Go to the web-store and log in.
- 2. Search for the package "*Demand Forecast Response*" to be able to confirm ZLPI delivery agreements.*
- 3. Enter "Schaeffler Technologies AG & Co. KG" as customer and purchase the package.

Notice:

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"Demand Forecast Response" is necessary for confirming delivery schedules. Existing processes, such as the processing of "Purchase Orders", are not affected by this. Corresponding packages are still to be used.

> <u>Please note</u>: If you have not yet adjusted your EDI interface at the time of sending the Warm-Up-ZLPI, we still ask you to confirm the delivery agreement via SupplyOn's WebEDI service as described in this document!

*) Direct product link: Demand Forecast Response

For further training material and support also go to our SupplyOn Information portal for Schaeffler production material suppliers





Infoportal | Schaeffler (supplyon.com)



Agenda

1 General information about S&OP and ZLPI

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3 Next steps

Next steps

Next steps



SCHAEFFLER

Next steps



Thank you!

