



# Automated Reports

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## Introduction

Automated reports are a great way to be kept informed of your quotes and orders. Explained over the next few pages are details of each report available, including the abbreviations used on a daily basis by the Global Services team.

## Quotation Overview Report

The Quotation Overview is a multi-sheet Microsoft Excel workbook.

It contains an **Index** sheet (sheet 1) of all current quotation requests (commonly referred to as RFQ - Request for Quotation) i.e. the quote sent to Global Services by the customer. Each entry hyperlinks to a detailed sheet within the workbook.

It can be tailored to show just items for a specific department, for example, all Engineering quotations, a selection of departments, for example Interior and Deck, or all quotations for the customer irrespective of department.

The overview consists of the following columns:

**Customer Ref** - Example REF123

If the customer has provided a reference number when submitting a request for quotation then it will be displayed on the overview.

**Department** - Example Engineering(4)

Displays the department and the number of quote lines in brackets alongside. A quote line will have a quantity, each individual quantity of a quote line will have a status. Individual quantities of a quote line can be at different statuses to each other.

**Cust Quote Header Description** - Example Bow Thruster Spares

The description assigned to the quote by the Global Services Order Manager. Where available we will use the quote request description provided by the customer. The description is a hyperlink to the detail sheet for the selected quote.

**Cust Quote No.** - Example EA0001EXAMQ

This is the reference generated by the Global Services system.

**Ext Price** - Ext Price (£)

Displays the quoted amount, in the relevant currency, for all quote lines attached to the selected quote.

**Creation Date** - Example 26-Jul-2011

The date that the quotation was created on the Global Services system.

**Approved by** - Example Joe Blogs

The name of the individual who approved the quote to be ordered.

**Status** - Example Q-PWV(19), RTQ(4)

The status of the individual quantities of quote lines. In the above example it indicates that a within the quote, there are quote lines that have a combined quantity of 19 at Q-PWV (**Quote Placed With Vendor**) and quote lines that have a combined quantity of 4 at RTQ (**Ready to Quote**).

The 19 and 4 do not mean there are 23 individual quote lines. The number of individual quote lines are displayed in the Department column. In the above example it shows Engineering(4), so there are 4 quote lines with a combined quantity of 23, 19 at Q-PWV and 4 at RTQ. Clicking the description hyperlink will display a detailed breakdown of the quotation.

**Order Manager** - Example Mick Gaye

The name of the Global Services employee who has processed the quotation.

## Sales Order Overview Report

The **Sales Order Overview** is a multi-sheet Microsoft Excel workbook.

It contains an **Index** sheet (sheet 1) of all current Sales Orders, each entry hyperlinking to a detailed sheet within the workbook.

When requesting the Sales Order Overview you will have the option to include the **PO-PWV** (Purchase Order Placed with Vendor) & **INWH** (In Warehouse) reports.

The Sales Order Overview can be tailored to show just items for a specific department, for example, all Engineering Sales Orders, a selection of departments, for example Interior and Deck, or all Sales Orders for the customer irrespective of department.

The overview consists of the following columns:

**Customer Ref** - Example REF123

If the customer has provided a reference number when submitting the original request for quotation or the Sales Order then it will be displayed on the overview.

**Department** - Example Engineering(4)

Displays the department and the number of order lines in brackets alongside. An order line will have a quantity, each individual quantity of an order line will have a status. Individual quantities of an order line can be at different statuses to each other.

**Cust Order Header Description** - Example Bow Thruster Spares

The description assigned to the Sales Order by the Global Services Order Manager. Where available we will use the Sales Order description provided by the customer. The description is a hyperlink to the detail sheet for the selected Sales Order.

**Cust Order No.** - Example EA0001EXAMQ

This is the reference generated by the Global Services system.

**Ext Price** - Ext Price (£)

Displays the quoted amount, in the relevant currency, for all order lines attached to the selected Sales Order.

**Creation Date** - Example 26-Jul-2011

The date that the Sales Order was created on the Global Services system.

**Approved by** - Example Joe Blogs

The name of the individual who approved the quote to be ordered.

**Status** - Example PO-PWV(19), INWH(4)

The status of the individual quantities of quote lines. In the above example it indicates that a within the quote, there are quote lines that have a combined quantity of 19 at Q-PWV (**Quote Placed With Vendor**) and quote lines that have a combined quantity of 4 at RTQ (**Ready to Quote**).

The 19 and 4 do not mean there are 23 individual quote lines. The number of individual quote lines are displayed in the Department column. In the above example it shows Engineering(4), so there are 4 quote lines with a combined quantity of 23, 19 at Q-PWV and 4 at RTQ. Clicking the description hyperlink will display a detailed breakdown of the quotation.

**Order Manager** - Example Mick Gaye

The name of the Global Services employee who has processed the Sales Order.

## **PO-PWV Status Overview Report**

**PO-PWV** is an abbreviation for '**Purchase Order Placed with Vendor**'

Abbreviations are used by Global Services to determine the status of Quotation and Sales Order line items as they move through the supply chain.

This PO-PWV Status Overview gives a breakdown of all items currently on order with our Vendor(s).

It shows the quantities currently on order, any quantities partially received by Global Services and any quantities shipped to the customer.

If the customer uses reference numbers when placing orders with Global Services then this is also included to allow easy cross referencing.

The overview consists of the following columns:

**Doc Line Number** - Example EA0020EXAMP-1

This reference shows the Sales Order number the order line belongs to as well as its line number within the Sales order. The alphanumeric number before the '-' is the Sales Order Number, the number after the '-' is the order line number.

**Order Description** - Example Bow Thruster Spares

The description assigned to the Sales Order by the Global Services Order Manager. Where available we will use the Sales Order description provided by the customer.

**Manufacturer Part No** - Example TZX19

The number assigned to the part by the manufacturer

**Vendor Part No** - Example 354-675

The number the vendor (supplier to Global Services) assigned to the manufacturers part.

**Manufacturer** - Example Cathelco

Name of the manufacturer

**Description** - Example 'FE Cast Iron Anode'

The description assigned to the part by either the manufacturer, vendor, Global Services or the customer.

**Status** - Example PO-PWV(19)

The status of the individual quantities of the order line. In the above example it indicates that a within the Sales Order the order line has a quantity of 19 at PO-PWV (Purchase Order Placed With Vendor).

**Order Qty**

The overall quantity of the single order line. The order quantity can be equal to or greater than the quantity PO-PWV.

**Rec Qty**

The quantity (of the order line qty) of the order line received by Global Services.

**Shipd Qty**

The quantity (of the order line qty) already shipped to the customer.

**Customer Ref** - Example REF123

If the customer has provided a reference number when submitting a the original request for quotation or the Sales Order then it will be displayed on the overview.

## **INWH Status Overview Report**

**INWH** is an abbreviation for '**In Warehouse**'

**SIP** is an abbreviation for '**Shipment In Preparation**'

**RTS** is an abbreviation for '**Ready To Ship**'

The INWH Status Overview Report shows all order lines that are currently at Global Services (or at a warehouse location owned by Global Services).

The three statuses; INWH, SIP and RTS indicate where the order line is in the supply chain.

If an item is INWH then it indicates that the item is held in our warehouse and we are awaiting instruction to ship.

If an item has a status of SIP then it indicates the item is held in our warehouse but has already been packed into a shipment.

If an item has a status of RTS then it indicates that the item is in our warehouse but has been marked for picking and therefore ready to add to a shipment (existing or new shipment).

The overview consists of the following columns:

**Doc Line Number** - Example EA0020EXAMP-1

This reference shows the Sales Order number the order line belongs to as well as it's line number within the Sales order.

The alphanumeric number before the '-' is the Sales Order Number, the number after the '-' is the order line number.

**Order Description** - Example Bow Thruster Spares

The description assigned to the Sales Order by the Global Services Order Manager. Where available we will use the Sales Order description provided by the customer.

**Manufacturer Part No** - Example TZX19

The number assigned to the part by the manufacturer.

**Vendor Part No** - Example 354-675

The number the vendor (supplier to Global Services) assigned to the manufacturers part.

**Manufacturer** - Example Cathelco

Name of the manufacturer.

**Description** - Example 'FE Cast Iron Anode'

The description assigned to the part by either the manufacturer, vendor, Global Services or the customer.

**Status** - Example PO-PWV(19)

The status of the individual quantities of the order line. In the above example it indicates that a within the Sales Order the order line has a quantity of 19 at PO-PWV (Purchase Order Placed With Vendor).

**Order Qty**

The overall quantity of the single order line. The order quantity can be equal to or greater than the quantity PO-PWV.

**Rec Qty**

The quantity (of the order line qty) of the order line received by Global Services.

**Shipd Qty**

The quantity (of the order line qty) already shipped to the customer.

**Customer Ref** - Example REF123

If the customer has provided a reference number when submitting the original request for quotation or the Sales Order then it will be displayed on the overview.

If you have any questions about our Automated Reporting service, please contact a member of the Sales Team on **+44 (0) 1392 354300** or **sales@globalservicesltd.co.uk**.

## Status Abbreviations

**Q-TBP** = Quote To Be Processed

The customer has requested a quotation, the quotation line item has been added to our system but has yet been priced

**Q-PWV** = Quote Placed With Vendor

The quotation line item has been sent to the vendor to be priced

**QBV** = Quote By Vendor

The vendor has returned a price for the quotation line item and it has been added to our system

**RTC** = Ready To Quote

The quotation line item has been priced and is ready to send to the customer for approval

**QTC** = Quoted To Customer

The quotation line item has been sent to the customer for approval

**PO-TBP** = Purchase Order To Be Processed

The customer has approved an item for order, it has been added to our system but has yet been send to the allocated vendor

**PO-PWV** = Purchase Order Placed With Vendor

The line item has been ordered from the allocated vendor, but has not been received

**INWH** = In Warehouse

The item, ordered from a vendor, has been received into our warehouse

**SIP** = Shipment In Preparation

The ordered item has been received and added directly to a shipment being prepared for onward shipping to the customer

**RTS** = Ready To Ship

The item is in our warehouse and has been marked for picking and packing into a shipment

**SHIPD** = Shipped

The item has been shipped to the customer