

# Sears EDI Guidelines

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## 830 Planning Schedule

v4010

### INTRODUCTION

The Planning Schedule transaction is used to transmit forecast data for the Distribution Resource Planning system (DRP). This transaction is bi-directional; it is: 1) transmitted by the Trading Partner to Sears to convey production scheduling and finished goods information; and, 2) transmitted by Sears to the Trading Partner to convey a forecast of future product needs. This transaction set will be implemented with selected trading partners.

An 830 Planning Schedule is sent each week from the Trading Partner to Sears providing production schedules for between two and ten weeks in the future. The actual range of dates is determined by Sears/Trading Partner agreement. An 830 Planning Schedule is sent each week from Sears to the Trading Partner to forecast requirements for up to 52 weeks for regular goods, and up to 14 - 17 weeks for promotional goods. This forecast should be used by the Trading Partner to schedule finished goods production.

### ISA/GS Qualifier, Sender/Receiver ID

TEST	08, 6111250038
PRODUCTION	08, 6111250039

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Functional Group ID=**PS**

## Transaction Set Table

### Header

<u>Seg. ID</u>	<u>Name</u>	<u>Req. Des.</u>	<u>Max.Use</u>	<u>Loop Repeat</u>
ST	Transaction Set Header	M	1	
BFR	Beginning Segment for Planning Schedule	M	1	
REF	Reference Identification	O	12	
	LOOP ID - N1			200
N1	Name	O	1	

### Detail

<u>Seg. ID</u>	<u>Name</u>	<u>Req. Des.</u>	<u>Max.Use</u>	<u>Loop Repeat</u>
	LOOP ID - LIN			>1
LIN	Item Identification	M	1	
UIT	Unit Detail	O	1	
PID	Product/Item Description	O	1000	
	LOOP ID - N1			200
N1	Name	O	1	
	LOOP ID - FST			>1
FST	Forecast Schedule	O	1	

### Summary

<u>Seg. ID</u>	<u>Name</u>	<u>Req. Des.</u>	<u>Max.Use</u>	<u>Loop Repeat</u>
CTT	Transaction Totals	O	1	
SE	Transaction Set Trailer	M	1	

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**Segment:** **ST** Transaction Set Header  
**Loop:**  
**Level:** Header  
**Usage:** Mandatory  
**Max Use:** 1

### Data Element Summary

<u>Ref.</u>	<u>Data</u>		<u>Sears'</u>
<u>Des.</u>	<u>Element</u>	<u>Name</u>	<u>Attributes</u>
ST01	143	Transaction Set Identifier Code 830 Planning Schedule with Release Capability	M ID 3/3
ST02	329	Transaction Set Control Number	M AN 4/9

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**Segment:** **BFR** Beginning Segment for Planning Schedule  
**Loop:**  
**Level:** Header  
**Usage:** Mandatory  
**Max Use:** 1

- Notes:**
1. Subsequent forecasts always replace previous forecasts.
  2. BFR06 and BFR07 must specify the forecast horizon, i.e., the earliest and latest dates used in the detail start and end dates (FST04 and FST05, respectively).

### Data Element Summary

Ref.	Data		Sears'
<u>Des.</u>	<u>Element</u>	<u>Name</u>	<u>Attributes</u>
BFR01	353	Transaction Set Purpose Code 00 Original	M ID 2/2
BFR02	127	Reference Identification Reference Number assigned by Sender	M AN 1/30
Not Used	BFR03	328 Release Number	
	BFR04	675 Schedule Type Qualifier BB Customer Production (Consumption) Based	M ID 2/2
	BFR05	676 Schedule Quantity Qualifier A Actual Discrete Quantities	M ID 1/1
	BFR06	373 Date Starting date of the forecast	M DT 8/8
	BFR07	373 Date Ending date of the forecast.	M DT 8/8
	BFR08	373 Date Date the forecast is generated (run date)	M DT 8/8
Not Used	BFR09	373 Date	
Not Used	BFR10	367 Contract Number	
Not Used	BFR11	324 Purchase Order Number	
Not Used	BFR12	783 Planning Schedule Type Code	
Not Used	BFR13	306 Action Code	

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**Segment:** **REF** Reference Identification  
**Loop:**  
**Level:** Header  
**Usage:** Required by Sears  
**Max Use:** 2

- Notes:**
1. Two iterations of the REF segment are required; one to specify the vendor number and a second to specify the department number.
  2. The vendor number that will be specified in REF02 (when REF01 contains code IA) must be agreed to by Sears before testing can begin.

### Data Element Summary

<u>Ref. Des.</u>	<u>Data Element</u>	<u>Name</u>	<u>Sears' Attributes</u>
REF01	128	<b>Reference Identification Qualifier</b> DP Department Number IA Internal Vendor Number	M ID 2/2
REF02	127	<b>Reference Identification</b> 3 - 3 Department Number 9 - 9 Internal Vendor Number	M AN 3/9
Not Used	REF03	352 <b>Description</b>	
Not Used	REF04	C040 <b>Reference Identifier</b>	

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**Segment:** **N1** Name  
**Loop:** N1  
**Level:** Header  
**Usage:** Required by Sears - Inbound only  
**Max Use:** 1

- Notes:**
1. This segment is required on all 830 transaction sets that are sent to Sears to identify the sender's company name. The vendor name must be 10 characters, left justified, with no trailing spaces and without any special characters.
  2. This segment will not be present in the transaction sets Sears sends.

### Data Element Summary

<u>Ref.</u>	<u>Data</u>	<u>Name</u>	<u>Sears'</u>
<u>Des.</u>	<u>Element</u>		<u>Attributes</u>
	<b>N101</b>	<b>98 Entity Identifier Code</b> VN Vendor	<b>M ID 2/2</b>
	<b>N102</b>	<b>93 Name</b> 10 - 10 Vendor name	<b>M AN 10/10</b>
Not Used	<b>N103</b>	<b>66 Identification Code Qualifier</b>	
Not Used	<b>N104</b>	<b>67 Identification Code</b>	
Not Used	<b>N105</b>	<b>706 Entity Relationship Code</b>	
Not Used	<b>N106</b>	<b>98 Entity Identifier Code</b>	

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**Segment:** **LIN** Item Identification  
**Loop:** LIN  
**Level:** Detail  
**Usage:** Mandatory  
**Max Use:** 1 per LIN loop; LIN loop may repeat per standards

- Notes:**
1. Separate forecasts are generated for each item/SKU and stocking location. That is, the same item/SKU may be referenced more than once within the transaction set: once for each stocking location.
  2. LIN04 and LIN05 will be present to identify the SKU (size and color), if applicable.

Data Element Summary				Sears' Attributes	
Ref.	Data	Name			
<u>Des.</u>	<u>Element</u>	<u>Name</u>			
Not Used	LIN01	350	Assigned Identification		
	LIN02	235	Product/Service ID Qualifier	M	ID 2/2
			IN Buyer's Item Number		
	LIN03	234	Product/Service ID	M	AN 4/5
			4 - 5 Sears' item number		
	LIN04	235	Product/Service ID Qualifier	O	ID 2/2
			IZ Buyer's Size Code		
	LIN05	234	Product/Service ID	C	AN 3/3
			3 - 3 Sears' SKU number		
Not Used	LIN06	235	Product/Service ID Qualifier		
Not Used	LIN07	234	Product/Service ID		
Not Used	LIN08	235	Product/Service ID Qualifier		
Not Used	LIN09	234	Product/Service ID		
Not Used	LIN10	235	Product/Service ID Qualifier		
Not Used	LIN11	234	Product/Service ID		
Not Used	LIN12	235	Product/Service ID Qualifier		
Not Used	LIN13	234	Product/Service ID		
Not Used	LIN14	235	Product/Service ID Qualifier		
Not Used	LIN15	234	Product/Service ID		
Not Used	LIN16	235	Product/Service ID Qualifier		
Not Used	LIN17	234	Product/Service ID		
Not Used	LIN18	235	Product/Service ID Qualifier		
Not Used	LIN19	234	Product/Service ID		
Not Used	LIN20	235	Product/Service ID Qualifier		
Not Used	LIN21	234	Product/Service ID		
Not Used	LIN22	235	Product/Service ID Qualifier		
Not Used	LIN23	234	Product/Service ID		

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	<u>Ref.</u>	<u>Data</u>		<u>Sears'</u>
	<u>Des.</u>	<u>Element</u>	<u>Name</u>	<u>Attributes</u>
Not Used	LIN24	235	Product/Service ID Qualifier	
Not Used	LIN25	234	Product/Service ID	
Not Used	LIN26	235	Product/Service ID Qualifier	X ID 2/2
Not Used	LIN27	234	Product/Service ID	X AN 1/48
Not Used	LIN28	235	Product/Service ID Qualifier	X ID 2/2
Not Used	LIN29	234	Product/Service ID	X AN 1/48
Not Used	LIN30	235	Product/Service ID Qualifier	X ID 2/2
Not Used	LIN31	234	Product/Service ID	X AN 1/48



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**Segment:** **UIT** Unit Detail  
**Loop:** LIN  
**Level:** Detail  
**Usage:** Required for Sears  
**Max Use:** 1 per LIN loop

**Notes:** 1. The unit of measure for all forecast quantities is each.

### Data Element Summary

<u>Ref.</u>	<u>Data</u>	<u>Name</u>	<u>Sears'</u>
<u>Des.</u>	<u>Element</u>		<u>Attributes</u>
UIT01	C001	Composite Unit of Measure	M
-C00101	355	Unit or Basis for Measurement Code EA                      Each	M ID 2/2
Not Used	-C00102-C00115		
Not Used	UIT02	212 Unit Price	
Not Used	UIT03	639 Basis of Unit Price Code	

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**Segment:** **PID** Product/Item Description  
**Loop:** LIN  
**Level:** Detail  
**Usage:** Conditional for Sears  
**Max Use:** 1 per LIN loop

- Notes:**
1. As predetermined between trading partners, PID05 will provide a forecast ranking for the item/SKU and location referenced in the associated LIN and N1 segments. This ranking is tied to the item/SKU and location, not the forecast quantities for the item/SKU.
  2. The number in the first position (PID05) identifies the ranking (e.g., future forecast, forecast error using standard deviation, etc.) and the alpha character in the second position indicates the inventory stratification for that ranking.

### Data Element Summary

	<u>Ref.</u>	<u>Data</u>		<u>Sears'</u>
	<u>Des.</u>	<u>Element</u>	<u>Name</u>	<u>Attributes</u>
	PID01	349	Item Description Type F Free-form	M ID 1/1
Not Used	PID02	750	Product/Process Characteristic Code	
Not Used	PID03	559	Agency Qualifier Code	
Not Used	PID04	751	Product Description Code	
	PID05	352	Description Forecast ranking	M AN 2/2
Not Used	PID06	752	Surface/Layer/Position Code	
Not Used	PID07	822	Source Subqualifier	
Not Used	PID08	1073	Yes/No Condition or Response Code	
Not Used	PID09	819	Language Code	

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**Segment:** **N1** Name  
**Loop:** N1  
**Level:** Detail  
**Usage:** Required by Sears  
**Max Use:** 1 per LIN loop

- Notes:**
1. The value sent in N104 identifies the reporting location for the item/SKU referenced in the associated LIN segment for which forecast quantities are being sent. This location may be either a Sears' location or vendor location as predetermined between trading partners.
  2. Location codes must be agreed to by Sears before testing can begin.
  3. If N104 contains code NATL, national level data is being transmitted.

### Data Element Summary

Ref.	Data		Sears'
<u>Des.</u>	<u>Element</u>	<u>Name</u>	<u>Attributes</u>
N101	98	<b>Entity Identifier Code</b>	M ID 2/3
		RL Reporting Location	
Not Used	N102	93 <b>Name</b>	
	N103	66 <b>Identification Code Qualifier</b>	M ID 2/2
		92 Assigned by Buyer or Buyer's Agent	
	N104	67 <b>Identification Code</b>	M AN 4/7
		4 - 7 Location code	
Not Used	N105	706 <b>Entity Relationship Code</b>	
Not Used	N106	98 <b>Entity Identifier Code</b>	

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**Segment:** **FST** Forecast Schedule  
**Loop:** FST  
**Level:** Detail  
**Usage:** Required by Sears  
**Max Use:** 1 per FST segment; FST segment may repeat per standards

- Notes:**
1. The forecast start date is the Sunday run date. The forecast end date is required for 830 transactions sent to Sears.
  2. The Forecast Quantity Qualifier code in FST02 represents a DRP Order Planning Type within Sears' DRP application. Some codes are used in transactions Sears receives (inbound) and some codes are used in transactions Sears sends (outbound). E.g., code A (Immediate) may be used on inbound transactions to Sears. Code A is equivalent to the DRP Order Planning Type 3 (quantity available to ship).

### Data Element Summary

Ref.	Data		Sears'
<u>Des.</u>	<u>Element</u>	<u>Name</u>	<u>Attributes</u>
FST01	380	Quantity	M R 1/15
FST02	680	Forecast Qualifier	M ID 1/1

#### Inbound codes:

- A Immediate  
DRP Order Planning Type/Code = Quantity Available to Ship (DRP internal code 3)
- C Firm  
DRP Order Planning Type/Code = Firm Production Schedule Quantity (DRP internal code 1)
- Z Mutually Defined  
DRP Order Planning Type/Code = Customer Orders (DRP internal code 2)

#### Outbound codes:

- B Pilot/Prevolume  
DRP Order Planning Type/Code = Shipment Forecast Actual (DRP internal code D)
- D Planning  
DRP Order Planning Type/Code = Recommended Order Receipt (DRP internal code P)
- N Normal Tooling Capacity  
DRP Order Planning Type/Code = Projected Inventory Needs (DRP internal code Q)

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FST02 continued

Inbound codes continued:

S Strike Protection  
 DRP Order Planning Type/Code = Safety  
 Stock Build-Up (DRP internal code A)  
 T Required Tooling Capacity  
 DRP Order Planning Type/Code = Planned  
 Inventory Needs (DRP internal code R)

Ref.	Data		Sears'
<u>Des.</u>	<u>Element</u>	<u>Name</u>	<u>Attributes</u>
FST03	681	Forecast Timing Qualifier	M ID 1/1
		D Discrete	
FST04	373	Date	M DT 8/8
		Forecast start date	
FST05	373	Date	M DT 8/8
		Forecast end date	
Not Used	FST06	374 Date/Time Qualifier	
Not Used	FST07	337 Time	
Not Used	FST08	128 Reference Identification Qualifier	
Not Used	FST09	127 Reference Identification	
Not Used	FST10	783 Planning Schedule Type Code	

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**Segment:** **CTT** Transaction Totals  
**Loop:**  
**Level:** Summary  
**Usage:** Optional  
**Max Use:** 1

- Notes:**
1. The CTT segment will be present on all transactions Sears sends. It is optional on transactions that Sears receives.
  2. CTT01 is the accumulation of LIN segments present in the transaction, i.e., the count of detail loops.

### Data Element Summary

	<u>Ref.</u>	<u>Data</u>		<u>Sears'</u>
	<u>Des.</u>	<u>Element</u>	<u>Name</u>	<u>Attributes</u>
	CTT01	354	<b>Number of Line Items</b> Count of LIN segments present in the transaction	M NO 1/6
Not Used	CTT02	347	<b>Hash Total</b>	
Not Used	CTT03	81	<b>Weight</b>	
Not Used	CTT04	355	<b>Unit or Basis for Measurement Code</b>	
Not Used	CTT05	183	<b>Volume</b>	
Not Used	CTT06	355	<b>Unit or Basis for Measurement Code</b>	
Not Used	CTT07	352	<b>Description</b>	

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**Segment:** **SE** Transaction Set Trailer  
**Loop:**  
**Level:** Summary  
**Usage:** Mandatory  
**Max Use:** 1

- Notes:**
1. SE01 is the total number of segments present in the transaction, including the control segments.
  2. SE02 must match the number in ST02.

### Data Element Summary

<u>Ref.</u>	<u>Data</u>		<u>Sears'</u>
<u>Des.</u>	<u>Element</u>	<u>Name</u>	<u>Attributes</u>
SE01	96	Number of Included Segments	M N0 1/10
SE02	329	Transaction Set Control Number	M AN 4/9

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### Segment Usage Examples

#### Inbound (from Trading Partner to Sears)

ST\*830\*Control number

BFR\*00\*Document reference number\*\*BB\*A\*Start date\*End date\*Create date

[Document reference, Schedule type and quantity  
qualifiers, Start, end and run dates of schedule]

REF\*DP\*Buying department number

[One department number per 830]

REF\*IA\*Internal vendor number

[Sears-assigned vendor number]

N1\*VN\*Vendor Name

[Vendor name; required on INBOUND  
transactions only]

LIN\*\*IN\*Sears' item number\*IZ\*SKU number [Line item identification; LIN loop repeats for  
each item/reporting location combination]

UIT\*EA

N1\*RL\*\*92\*Reporting Location

[Reporting location]

FST\*Quantity\*Qualifier\*F\*Forecast start date\*Forecast end date

[Identifies forecast period, one iteration for each  
forecast period]

SE\*Segment count\*Control number



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## Segment Usage Examples

### Outbound (from Sears to Trading Partner)

ST\*830\*Control number

BFR\*00\*Document reference number\*\*BB\*A\*Start date\*End date\*Create date

Document reference, Schedule type and quantity  
qualifiers; Start, end and run dates of schedule]

REF\*DP\*Buying department number

[One department number per 830]

REF\*IA\*Internal vendor number

[Sears-assigned vendor number]

LIN\*\*IN\*Sears' item number\*IZ\*SKU number [Line item identification; LIN loop repeats for  
each item/reporting location combination]

UIT\*EA

N1\*RL\*\*92\*Reporting Location

[Reporting location]

FST\*Quantity\*Qualifier\*D\*Forecast start date\*Forecast end date

[Identifies forecast period, one iteration for each  
forecast type and period]

CTT\*Count of LIN segments

SE\*Segment count\*Control number