7.7. Program Window

The program window consists of the menu, toolbar, and tabs (see figure below).



The menu provides access to all the Streamline commands. The toolbar contains the most used commands. Tabs are the major elements of the program window and correspond to the main activities Streamline is designed to implement. They are logically divided into:

- **Start** tab aims to help you get started using Streamline quickly. It gives access to the built-in Streamline examples, useful resources, and your recent projects.
- **Demand forecasting** is where the planning of your customers' demand takes place. Streamline automatically generates demand forecasts as soon as your data is imported. It also gives you the ability to override the forecasts with your own. To learn more about the capabilities of this tab, refer to the Demand forecasting tab article.
- **Inventory planning** tab is where Streamline generates a supply (or ordering) plan automatically aligning it with the demand plan that you come up with at the **Demand forecasting** tab. If your supply chain involves distribution centers, the ordering plan is generated for locations that are not replenished from those DCs. The ordering plan is generated based on a set of replenishment parameters that are set up by the user. To learn more about the capabilities of this tab, refer to the Inventory planning tab article.
- **Distribution center** is designed to generate a replenishment plan for your distribution centers. It is shown if you import and configure DCs when importing your data. To learn more about the capabilities of this tab, refer to the Distribution center tab article.
- **Intersite** is specially designed to generate intersite transfer orders. By default, this tab is hidden. Streamline shows it if you enable the intersite optimization feature in the program settings. It displays available transfers that are generated based on available overstocks at your

locations.

File menu is used to manipulate Streamline project files, create new projects using different data sources, open existing or recent projects, update and configure the current project, change the data source of the current project, and show its statistical information.

Item menu is used to manipulate items in the Tree View, Reports, Inventory planning, and Distribution center. The manipulations include removing item code from import, setting item substitutions, making item removals, adding/editing notes of the tree view leaf nodes, and explaining calculations.

Help menu provides access to Streamline's documentation and video tutorials, and allows users to change the language, check for updates, enter a license key, and to move the software to another computer.

File Item Help New project Spreadsheet connection ۲ 2020 Open... Ctrl+O Database connection Alt+F2 Recent projects Server connection Save Ctrl+S Cin7 connection Ctrl+Shift+S Save as... Ľ Open project Connect to server DEAR connection C Update data Ctrl+R Dynamics 365 Business Central connection Edit connection settings Dynamics GP connection Settings Dynamics NAV connection Exact Online connection Project statistics Fishbowl connection Time machine NetSuite connection Odoo connection Reports Pronto Xi connection QuickBooks connection 11 QuickBooks Online connection Dashboard SAP B1 connection Sellercloud connection Shopify connection Skubana connection Spire connection Unleashed connection Multiple connection ? User Guide

Menu File

File > New is used to create a new Streamline project from several data sources.

File > **New** > **Spreadsheet connection** > Aggregated data is used to create a new project from an Excel spreadsheet or CSV file having your sales data aggregated into particular periods (e.g. days, months, quarters,...).

File > **New** > **Spreadsheet connection** > Transactional data is used to create a new project from an Excel or CSV file containing a list of sales transactions. Such a list is usually an extract from a

database or ERP, accounting, or inventory management system.

File > **New** > Database connection is used to create a new project via direct SQL requests to a database using ODBC or MySQL driver.

File > New > Cin7 connection is used to create a new project from Cin7 software file.

File > New > DEAR connection is used to create a new project from DEAR software.

File > New > QuickBooks connection/QuickBooks Online connection is used to create a new project from QuickBooks software file.

File > New > Dynamics NAV connection is used to create a new project from Dynamics NAV software.

File > New > Dynamics 365 Business central connection is used to create a new project from Microsoft Dynamics 365 Business central software.

File > New > Dynamics GP connection is used to create a new project from Dynamics GP software.

File > New > Exact Online connection is used to create a new project from Exact Online software.

File > New > Fishbowl connection is used to create a new project from Fishbowl software.

File > New > NetSuite connection is used to create a new project from NetSuite software.

File > New > Odoo connection is used to create a new project from Odoo software.

File > New > Pronto XI connection is used to create a new project from Pronto Xi ERP system.

File > New > SAP B1 connection is used to create a new project from SAP Business One system.

File > New > Sellercloud connection is used to create a new project from Sellercloud system.

File > New > Shopify connection is used to create a new project from Shopify system.

File > New > Skubana connection is used to create a new project from Skubana system.

File > New > Spire connection is used to create a new project from Spire system database.

File > New > Unleashed connection is used to create a new project from Unleashed system.

File > New > Multiple connection is used to create a new project from multiple data source connections.

File > Open allows users to open existing projects in Streamline.

File > Recent projects allow users to open recent projects.

File > Save saves a new project or saves changes to an already created project.

File > Save as... is used to save the current project under a new name.

File > Update data loads new data from the data source into the current project, for example, a new sales period.

File > Edit connection settings are used to change the data source of the current project.

File > Settings opens the Program settings dialog which allows customizing the program, current project, and the main Streamline tabs.

File > Project statistics shows the statistics of the current projects.

S Project statistics × Import: Spreadsheet, C:\Users\User\Documents\GMDH Streamline\Multi-Location Demand & Revenue Forecasting\Data Example by location.xlsx Items: 8 Locations: 2 Planning items: 16 Models: 48 Base currency: OK

The statistics includes:

- Import method the connection that was used to import the data.
- *Data source* the path to the data source.
- *Items* the number of SKUs.
- Locations the number of warehouses or stores.
- Planning items the number of unique (item, location) pairs.
- *Models* the number of planning items multiplied by the number of periods in the past where forecasts were obtained.
- Base currency the base currency of the project.

File > Time Machine starts a simulation tool that executes future purchasing recommendations in a simulated ERP system.

Menu Item

File	ltem	He	elp			7				
Ŀ		Rem	iove fr	rom import A	Alt+Del	- C	Update data 🔻	Last updated on Apr 22, 2	2021	
		Substitute Ctrl+U Removal/substitution rules Bill of materials								
				tings 🎩	In transition	🗄 Export table 🔻 🖪 Expo	ort parameters 🛛 🖪 I	mport parameters		
			atches on hand		ategory 2	Item code	Description	Location	Supplier	
De		Expla	ain ca	lculation C	Ctrl+E	icies	05-T48	Cold & Flu Tablets [s	WH-001	56892-P
1	1	Т	2	Pharmacies	Pharma	acies	05-T48	Cold & Flu Tablets [s	WH-002	56892-P
	• entory	,	3	Pharmacies	Pharma	acies	05-T48	Cold & Flu Tablets [s	WH-003	56892-P
	→		4	Pharmacies	Pharma	acies	05-T48	Cold & Flu Tablets [s	WH-004	56892-P
Inte	erstore	2	5	Consumer g	Furnitu	re	1866-MB	Desk [linear trend m	WH-001	125689
	0		6	Consumer g	Furnitu	re	1866-MB	Desk [linear trend m	WH-002	125689
	Solution DC		7	Consumer g	Furnitu	re	1866-MB	Desk [linear trend m	WH-003	125689
			8	Consumer g	Furnitu	re	1866-MB	Desk [linear trend m	WH-004	125689
	Ê.		9	Fashion	Clothir	ng Sum	004652 Blue	Swimwear [seasonal	WH-001	5612457
Re	eports		10	Fashion	Clothir	ng Sum	004652 Blue	Swimwear [seasonal	WH-002	5612457
Ŀ	<u>.lıl</u>		11	Fashion	Clothin	ng Sum	004652 Blue	Swimwear [seasonal	WH-003	5612457
Das	hboar		12	Fashion	Clothir	ng Sum	004652 Blue	Swimwear [seasonal	WH-004	5612457

Item > Remove from Import bans selected item from import. After the command has been executed, the item will be removed from the current project and added to the list of removals and substitutions. To return the item to the project, you should first remove the corresponding rule in the Removal/substitution rules dialog, and re-import the data using the **Update Data** button then. In this situation, the Update data command makes a full re-import of the data.

Item > Substitute makes a substitution for the currently selected item code by a new item code, entered by a user in the newly appeared **Substitute an item** dialog shown below. This command merges sales history and inventory information of the items and entitles the result with the item code typed in the dialog. If you enter an item code that is not in the project, the command will rename the source item code.



If the item to be removed or substituted is referenced by any other item (for example, the reference is

built via the 'Use model from' option), Streamline removes the reference and notifies the user about that.

Item > Removal substitution rules... is used to manage item code removals and substitutions made in the current project. The command opens the Removal/substitution rules dialog.

Removal/substitution	rules					_		×
Items rules Ch	hannels rules						Crea	te
Source item co	de Substitute with	Item description	Multiplier	Substitution date	In use	Туре	Dele	te
C1020	C1040		1		Unknown	Custom	Clear	All
		•					Edit in	CSV
					Г	Save	Cano	

Bill of materials > Entire bill opens the Bill of materials dialog (see figure below).

Bill of materials — 🗆 🗡						
Expand Collapse		Search		0		
Item code On h	hand	Available on hand	Available max build	Οı		
✓ 1866-MB R — Raisins mix [material] 225	2	225	25			
4× 1866-MB-R white — Raisins white [material] 628	6	528				
6× 1866-MB-R black — Raisins black [material] 150	1	150				
✓ 56213-P — Milk Chocolate Bar Pack [seasonal model] 4525	5 4	4525	634			
10× 500461 — Milk Chocolate bar 200g [linear trend model] 8340	06	5340				
✓ 100× MB-50046 — Muesli box, 500 g [seasonal model] 2522	20 2	25220	500			
200× 1866-MB-RO — Rolled oats [material] 1175	5 1	1175				
50× 1866-MB-TWG — Toasted wheat germ [material] 3935	5 3	3935				
100× 1866-MB-WB — Wheat bran [material] 2750	0 2	2750				
50× 1866-MB-OB — Oat bran [material] 3320	0 3	3320				
50× 1866-MB-CW — Chopped walnuts [material] 293	2	293				
50× 1866-MB R — Raisins mix [material] 225	2	225				
<				>		
Export to XLSX			Close			

The dialog shows an imported bill of materials expressed in materials only using a tree view. The tree doesn't contain intermediate items. Streamline automatically converts them into materials. The top level of the tree indicates finished items, and the bottom, the materials the finished items are made of. The number before the \times sign indicates the quantity of the item required to create the given number of the finished item.

Bill of materials > Material/product tree opens the **Material/product tree** dialog. Depending on the type of the item selected in the **Tree view** the dialog changes as follows:

- if the item is a product, the dialog shows the materials and intermediate items it uses to be manufactured (see figure below).
- the sum symbol at the end of each tree node shows the quantity of this item required to build the given number of the finished item. In our example, to create 1 unit of 1866-MB we need 20 units of 1866-MB-R white, which is 50 * 0.4.

Material/product tree	X C
 1866-MB Uses materials 200× 1866-MB-RO — Rolled oats Σ=200 50× 1866-MB-TWG — Toasted wheat germ Σ=3 100× 1866-MB-WB — Wheat bran Σ=100 50× 1866-MB-OB — Oat bran Σ=50 50× 1866-MB-CW — Chopped walnuts Σ=50 50× 1866-MB R — Raisins mix Σ=50 0.4× 1866-MB-R white — Raisins white Σ=2 0.6× 1866-MB-R black — Raisins black Σ=3 	20
Copy code	Close

The **Copy code** button copies the code of the selected item of this dialog to the clipboard.

- if the item is of intermediate type, the dialog shows two categories, Uses materials and Used in products. The Uses materials category lists the materials (or subassemblies) that the item uses to be produced, and the Used in products shows the finished items that use this intermediate item to be manufactured.
- if the item is material, the dialog shows the products this item is used in.

Item > **Batches on hand** command opens the **Batches on hand** dialog (see figure below). This dialog displays items and the corresponding batches information that are under the selected node in the **Tree view**.

atch	es on hand				_		×
					Search		9
Ba	tches list						
	Item code	Description	Location	Batch code	Expiration date	On hand	^
1	05-T48	Cold & Flu Tablets [seasonal model]	DC — Distribution Center	10789	Jun 2, 2020	80,970	
2	05-T48	Cold & Flu Tablets [seasonal model]	WH-001 — WH New Jersey	10258	May 23, 2020	980	
3	05-T48	Cold & Flu Tablets [seasonal model]	WH-002 — WH San Francisco	10259	Mar 3, 2020	63,770	
4	05-T48	Cold & Flu Tablets [seasonal model]	WH-002 — WH San Francisco	10256	Nov 25, 2020	10,000	
5	05-T48	Cold & Flu Tablets [seasonal model]	WH-003 — WH New York	10584	May 23, 2020	9,850	
6	05-T48	Cold & Flu Tablets [seasonal model]	WH-004 — WH Los Angeles	10259	Oct 2, 2020	47,350	
7	VB2166 150	Vital Blue 150 g Vitamins new [seasonal model]	DC — Distribution Center	10789	Jun 2, 2020	56,730	
8	VB2166 150	Vital Blue 150 g Vitamins new [seasonal model]	WH-001 — WH New Jersey	10256	Mar 1, 2020	2,000	
9	VB2166 150	Vital Blue 150 g Vitamins new [seasonal model]	WH-002 — WH San Francisco	10259	May 25, 2020	86,850	
10	VB2166 150	Vital Blue 150 g Vitamins new [seasonal model]	WH-003 — WH New York	10256	Sep 30, 2020	16,950	
11	VB2166 150	Vital Blue 150 g Vitamins new [seasonal model]	WH-004 — WH Los Angeles	10259	May 25, 2020	33,470	

Item > Add note... and **Item > Edit note** are used to add and edit an annotation to item code (if no locations imported), or to planning item (if locations are imported). If selected item code has a note, the **Add note** command is changed to the **Edit note** command in the menu.

Item > Add note... opens the Edit note dialog shown below.

Edit note — Anonymous	×
You are adding a new note.	
Promoted.	
ОК	Cancel

The title of the dialog contains the username specified in the **General settings**. If the name is empty, the name **Anonymous** is used. The icon is added to the items with notes in the **Reports**, **Inventory, and Distribution Center**. In the **Tree view**, such items are prefixed as shown below.

Expand Collapse



If you hover over the cell with the triangle, Streamline pops up a little tooltip, showing the content of the note, its date, and the user who wrote it.

Item > **Edit note** opens the **Edit note dialog** allowing to change the note. It also shows, who last edited the note, and when that was.

Item > Explain calculation is designed to show and explain Streamline's planning process for each planning item.

Menu Help

Help > Documentation opens the Streamline's online documentation in the default browser.

Help > Language allows changing the language of Streamline's user interface.

Help > **Move to another computer...** is used to deactivate Streamline on the current machine. You can activate the software on another computer later using the same license key.

Help > Check for updates is used to check whether the new version of Streamline is available.

Toolbar

The toolbar contains the most commonly used operations and options.



New button is used to create a new project from different data sources.

Open... is used to open an existing project.

Save saves a new project or save changes to the already created project. Update data loads new data from the data source into the current project, for example, a new sales period.

Next: Start

Download PDF

From: https://gmdhsoftware.com/documentation-sl/ - **GMDH Streamline Docs**

Permanent link: https://gmdhsoftware.com/documentation-sl/program-window



Last update: 2022/12/06 16:49