Working with SAP Business One Settings

1. Managing UoM Groups

UoM – Unit of Measure is the quantitation (or pack size) in which an item can be counted. Some items can be counted in different UoMs, for example it can be counted separately or in a bundle of six. For this mechanism, SAP BO Business One has UoM Groups, where these pack sizes can be pre-defined. For example how many ‘pieces’ are in a ‘box’. This can be set in the Item Master Data form.



When dealing with an item with a pre-defined UoM group, the user will be able to select any applicable UoM in the Warehouse system. All quantities in the Warehouse system will be handled in the UoM specified and will be booked to SAP BO in the UoM defined in the Item Master Data’s relevant setting.

1.1. Example: Goods Receipt

To present the business logic through an example, several goods receipt will be shown in different UoM-s. The logic of handling UoMs is the same in other tasks.

In this simple example 5 ‘pallet’ of white printer paper was ordered. It is being delivered in different quantities for example a man can reasonable carry a few ‘boxes’ or a ‘pallet’ that is the default payload of a trolley.

Tapping the options button in line with the UoM field opens up the options for UoMs. These were defined in SAP BO, with the UoM Group. In this example ‘box’ is the base quantity. A ‘box’ can be divided into two ‘packs’ or 24 ‘boxes’ can be combined into one ‘carton’, etc.



In this example the ‘carton’ was chosen. Next 6 ‘cartons’ will be added to the goods receipt.
The bin location will be specified.

As it can be seen, 6 ‘cartons’ have been received for the first order. At first there were 5 ‘pallets’ in the order, it was converted to 10 ‘cartons’. Hence 6 / 10 cartons can be read in the first order.



Further in this example, if 10 ’boxes’ are added to the first order, the system will correctly calculate:
The already reported quantity 6 ’cartons’ = 6*24 ’boxes’ = 144 ’boxes’. Adding 10 will give 154 ’boxes’.
The full order is 5 ’pallets’ = 5*48 ’boxes’ = 240 ’boxes’.
So 144/240 ’boxes’ can be read in the goods receipt form.

1.2. Example: Deliveries picking

When picking for deliveries, the user can specify the quantities in the UoM of his choice. Tapping the options button in line with the UoM field opens up the options for UoMs.



These were defined in SAP BO, with the UoM Group. In this example ‘box’ is the base quantity. For example one ‘box’ is worth 2 ‘packs’. In this example ‘box’ was chosen.
The logic is the same as before. Next to the quantity field the current UoM can be viewed.

1.3. Example: Stock counting

When counting stocks, the user can specify the quantities in the UoM of his choice. Tapping the options button in line with the UoM field opens up the options for UoMs. These were defined in SAP BO, with the UoM Group. In this example ‘box’ is the base quantity. For example one ‘pallet' is worth 48 ‘boxes’. In this example ‘pallet’ was chosen.



Continuing the example one ’pallet’ has been counted and now can be seen in the list. Further 24 ’boxes’ were added to the counting. It can be seen, the system handles both UoMs in one list.



2. Multiple Branches

2.1. Setup

During the setup of a multiple branch managed company on the Service Manager, make sure that the defined SBO user is enabled for all company branches. This way the Service Broker will be able to perform transactions for each branch.

Note: Produmex Scan does not support branches linked to SAP B1 document series.



2.2. On the mobile device

If the company has branches enabled, an additional Branch field is displayed on the Login screen.

- (1) If the employee is not assigned to a branch and is allowed to work on all branches, you can specify the branch in this field. Tap the **…** button to select the branch from a list.
- (2) If the employee is assigned to a branch, this field is automatically populated and the

employee is not allowed to change it.
- (3) Restriction - not supported by Produmex Scan: The employee is allowed to work on two or more branches, but not on all of them.



On the main menu header, the branch is also displayed next to the company name and the employee.



After the branch has been selected, all transactions are applied with that branch.

A warehouse/bin location can only be selected if the warehouse is assigned to the branch or the warehouse is not assigned to any branch. Only stock stored in warehouses assigned to the branch/assigned to no branch are listed.

The employee will only be able to see documents assigned to the branch. In the case of inventory transfer documents, the employee will only be able to see the documents where the source warehouse is assigned to the branch.

Transactions can only be created for the business partner assigned to the selected branch.

Documents created from the mobile device will be assigned to the selected branch.

3. Working with Serial Managed items

When working with SAP serial numbers in Produmex, set the ‘Unique Serial Numbers by’ parameter to ‘Serial Numbers’ on the General Settings window in SAP B1.

3.1. On every transaction management method

If an item is managed by ‘On every transaction’ serial numbers, after the item quantity is added, the system proceeds to a screen where the serial numbers can be scanned.
Scan the serial numbers.

If the warehouse is managed by bin locations, enter the bin location first. It is possible to add the serial numbers into different bin locations.

The total number of the scanned serial numbers must equal to the quantity added on the previous screen.

3.2. On release only management method

Produmex only supports serial numbered items with ’on release only’ management method when the ’Automatic Serial Number Creation on Receipt’ option is enabled.

When this option is enabled, SAP B1 creates ‘blank’ serial numbers when receiving stocks without entering serial numbers. When creating outbound transactions, Produmex first checks if there are already existing ‘real’ serial numbers. If not, the system updates the “blank” serial numbers in SAP B1 with the serial numbers that will be issued and the transaction will be booked with these updated serial numbers.

Depending on the process, the quantity can be added by entering the quantity or by scanning the serial numbers.

Limitation:
Please note that you cannot change the base Unit of Measurement (UoM) group for an On Release Only (ORO) Serial Number managed item. The default UoM group for the item will be the base UoM group.

While you have the option to change the UoM group on the document line screen, the system will not save this setting, and the UoM will revert to the base UoM group.

Therefore, for the following flows the UoM group selection for ORO Serial Number managed items is temporarily not supported.

Affected functions:

- **GRPO**
- **Free GRPO**
- **Stock Transfer Request**

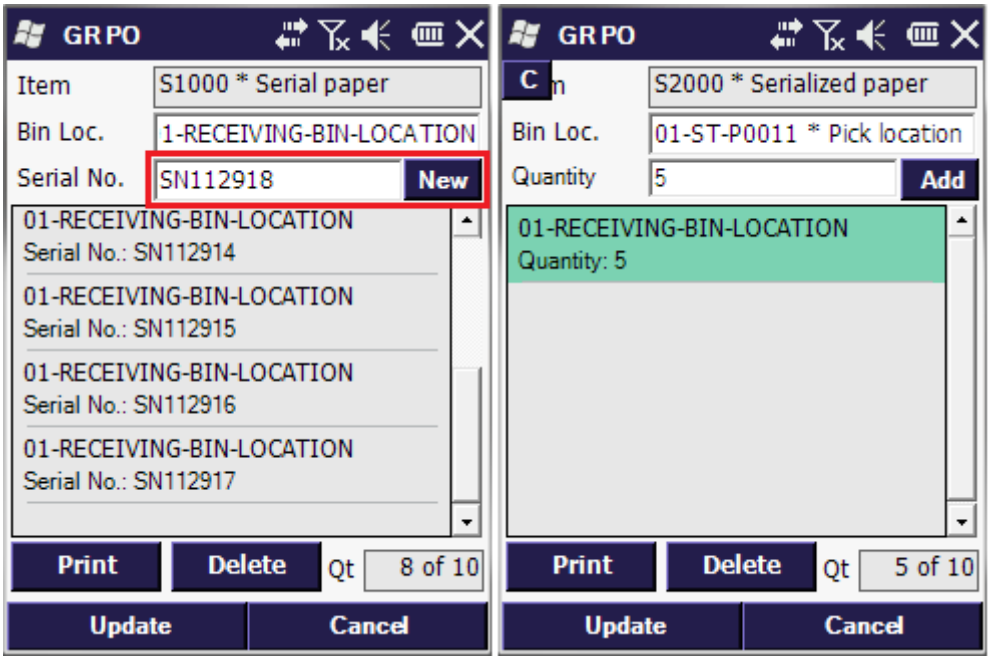
3.3. Examples

Goods Receipt

When receiving items managed by serial numbers, after the quantity to receive was added or updated on the Good Receipt PO lines screen, the system automatically prompts the user to the Goods Receipt Serial Quantities screen.

- If the item is managed by ‘On every transaction’ serial numbers, scan the received serial numbers. To delete a serial number, select its line and press the Delete button.
  It is possible to configure automatic serial number creation. For more information please see: Serial number generation. To automatically create the serial number, press the New button.
- If the item is managed by ’On release only’ serial numbers, simply add the received quantity to the Quantity field and press the Add button. The system automatically creates empty (placeholder) serial number records.

Press the Update button to save the changes and to go back the previous screen. The quantity of the scanned/added serial numbers must be equal to the quantity added on the Good Receipt PO lines screen.



Sales orders

When delivering items managed by serial numbers with the Sales orders function, after the quantity to issue was added on the Sales Issue Lines screen, the system automatically prompts the user to the Sales Issue Quantities Serial screen. Scan the serial numbers you would like to issue. The total number of the scanned serial numbers must be equal to the quantity to issue that was added on the Sales Issue Lines screen.

- If the item is managed by 'On every transaction' serial numbers, only serial numbers that are in stock in the warehouse/bin location can be scanned.
- If the item is managed by 'On release only' serial numbers, the number of the scanned new serial numbers cannot exceed the blank serial numbers on stock in the warehouse/bin location. After a new serial number is scanned, the blank serial number is updated with the scanned new serial number. If the user scans a serial number that exists on the bin location, no blank serial number will be updated.

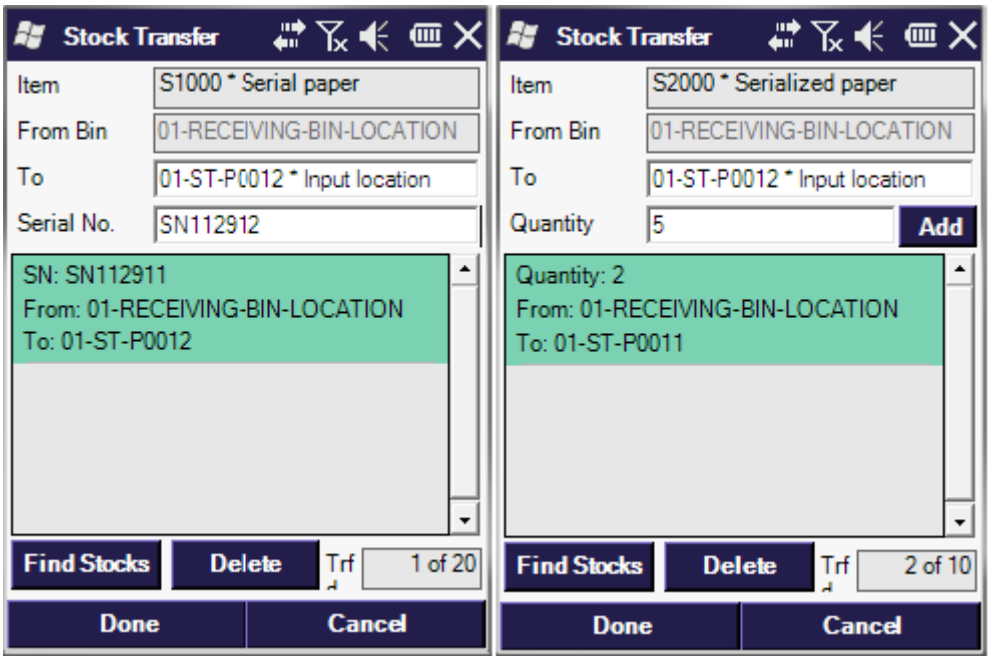
Press the Done button to save the changes and to go back the previous screen. The quantity of the scanned serial numbers must be equal to the quantity added on the Sales Issue Lines screen.

Stock transfer

When transferring items managed by serial numbers, after the item was selected on the Transfer Stocks Screen, the system automatically prompts the user to the Transfer Stocks Quantities Serial screen.

- If the item is managed by 'On every transaction' serial numbers, scan the serial numbers to transfer. Only serial numbers are on stock in the warehouse/bin location can be scanned.
- If the item is managed by 'On release only' serial numbers, enter the quantity to transfer to the Quantity field and press the Add button. The system automatically allocates the blank serial numbers that will be transferred. The system automatically allocates the serial numbers to be

transferred based on the serial number sequence.



4. Working with Batch numbers

If an item is batch-managed, the batch number must be entered or scanned during warehouse transactions in Produmex Scan. In every transaction (such as goods receipt, picking, transfer, or inventory counting), the following information is required:

- Item
- Warehouse or bin location (if bins are used)
- **Batch number**

Batch numbers may also be generated automatically depending on system configuration.
See further details here:Customization Examples

> **Important note:**
> Produmex Scan does not support batch numbers with the** “On Release Only” **management method. Items using this method cannot be processed in Produmex Scan.

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