

Produmex Scan Functional Guide

Introduction

This document describes the functionality of Produmex Scan.

The architecture of the solution supports warehouse workers to perform inventory transactions while all major SAP Business One inventory transactions are supported including picklists, stock counting, bin locations, serial and batch numbers, deliveries and goods receipts.

The client component is a native Windows CE/Mobile application while the server component is a scalable business logic transaction engine.

The mobile devices require a constant connection to the system. This communication is facilitated by the Service Broker. The data of each mobile device is saved to a temporal database so that multiple devices can be used at the same time on a task (for example two employees unloading the same shipment). Each employee can see the changes made by his co-worker in real time, so they can work parallel. This way you can make sure that the finished work is not lost if the mobile device connection is lost (network error, low battery, etc.).

The user can review all the changes before committing to the SAP Company Database. We call the procedure Posting when changes are made to the company database. The employee in charge of the operation can verify the results in the end.

When you use the Produmex Scan application and you prepare your inventory data to create SBO documents from it, the data is sent to the Service Broker each time you tap the Done button (so practically for each material line). The Service Broker saves this data in a mobile transaction that contains all the necessary information to create the appropriate booking. When you tap the trigger button to create the document (usually the Post button), the mobile transaction is processed and the relevant SBO document is created with DI API based on the data.

This logic ensures that you don't have to start the whole process again if you have already created a long list of transactions and you have a failure, for example in the network connection to the mobile device. In the Produmex Scan Add-on there are functions to handle those mobile transaction data.

Client Functionalities

1. Logging in

When you start the mobile application, the login screen is displayed.

If the pin code is set in the [employee master data](#) (Employee Master Data form > User-defined fields > Mobile password), you can either enter it in the User field or you can use the SAP BO employee code. After leaving the user field, the application automatically fills in the User Name field.

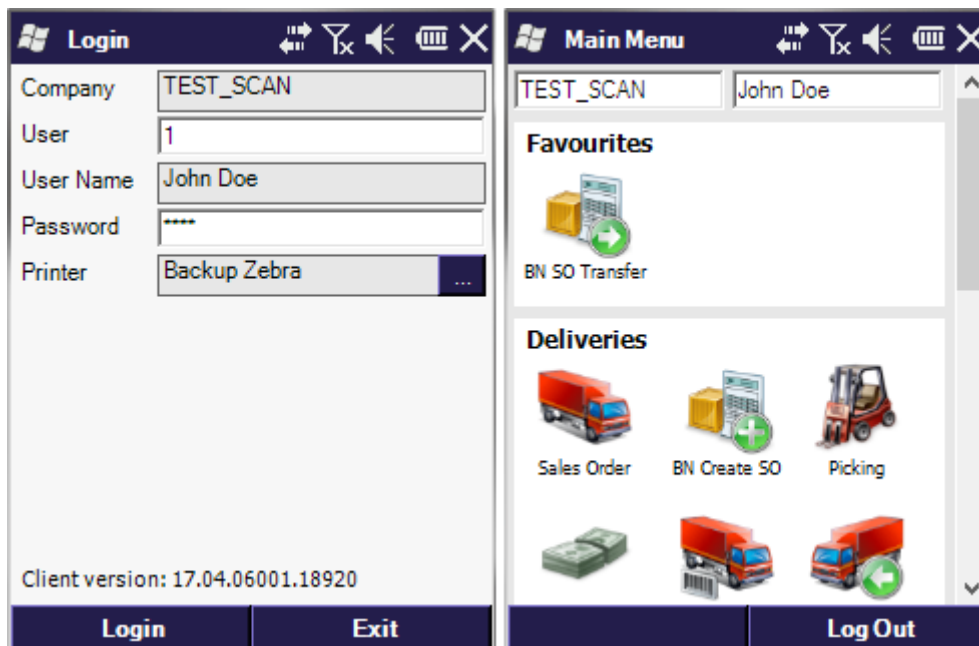
The user can also select a printer to work with by clicking the ... button next to the Printer field.

The mobile application can be closed with the Exit button.

When tapping Login the user is navigated to the main menu or the last active screen.

Users can see all the menu entries for which they have the rights. The rights can be set in the [employee master data](#)).

Note: Users can always see the Query Stocks and Print Labels menu.



2. Purchasing

Previously called “Goods Receipt PO”.

The following functions are available in the “Purchasing” menu:

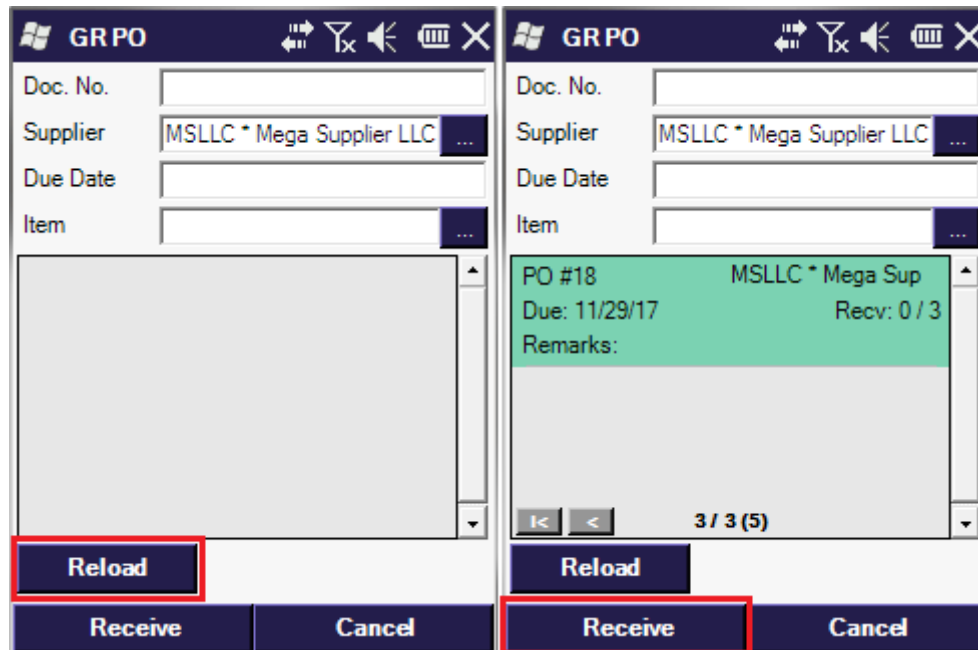
- GR PO
- Free GR PO
- Goods Return



2.1. Goods Receipt PO

2.1.1. Selecting Purchase Orders

From the Main Menu the GR PO entry leads to the form that can create a goods receipt PO in SAP BO. First the user will be prompted a list of the existing purchase orders in the SAP BO database. Filters can be used to find relevant purchase orders quickly. The user can set the filters and tap the Reload button to load the relevant data from the database. The grid below the filter fields will be filled with the available purchase order entries.



In one entry the user can see the document number of the purchase order, the name and description of the supplier, the due date and the already received full purchase order lines/all lines. In this example two orders were filtered, both have zero lines already filled out.

If the user taps Cancel, he will be navigated back to the Main Menu.

The user can select an entry and then tap Receive to enter the items and quantities for the Goods receipt PO.

2.1.2. Receiving Items

At the beginning of the entry the user can also see the purchase order line status. Only open purchase order lines are listed here. If the user enters the item number in the Item field and leave the field, the line containing the item will be automatically selected. Alternatively the user can select a line manually in the grid. The user cannot add items that are not in the purchase order.

Once the item line is selected, the user can enter the quantity he wants to receive in the Quantity field and then click on Add or Upd. If the user clicks on Add, the quantity entered will be added to the already set quantity. If the user clicks on Upd, the already set quantity will be overwritten with the new quantity. To cancel an entry, the user can update a quantity to zero.

The image shows three sequential screenshots of the 'GR PO' (Goods Receipt Purchase Order) screen. Each screen has a title bar with a Windows logo and standard mobile UI icons. The first screenshot shows the 'Purch.Ord.' field set to '18 * Mega Supplier LLC' and the 'Item Filter' set to 'A1000 * Normal paper'. The 'UoM' is 'pcs' and the 'Quantity' is '5'. The 'Add' button is highlighted with a red box. Below the input fields is a list of items: #1 A1000 * Normal paper (0 / 10 pcs), #2 B1000 * TESTB1 (10 / 10), and #3 S1000 * Serial paper (10 / 10). The second screenshot shows the 'Item' field set to 'A1000 * Normal paper' and the 'Bin Loc.' set to '1-SYSTEM-BIN-LOCATION'. The 'UoM' is 'pcs' and the 'Quantity' is '3'. The 'Add' button is highlighted. Below the input fields is a list of items: 01-RECEIVING-BIN-LOCATION (2 pcs). The third screenshot shows the 'Purch.Ord.' field set to '18 * Mega Supplier LLC' and the 'Item Filter' set to 'A1000 * Normal paper'. The 'UoM' is 'pcs' and the 'Quantity' is '5'. The 'Add' button is highlighted. Below the input fields is a list of items: #1 A1000 * Normal paper (5 / 10 pcs), #2 B1000 * TESTB1 (10 / 10), and #3 S1000 * Serial paper (10 / 10). The 'Print' button is highlighted with a red box.

2.1.3. Printing Lables

Tapping Print will navigate the user to the Goods receipt PO print label making form. Here the user can review the contents of the label, can change the [unit of measure \(UoM\)](#) of the products, can change the number of labels printed and can specify the [printer device](#) to be used.

Tapping the Print button will start the printing process. In the following example a printed label can be seen. Typically this label is printed on a sticker paper, ready to be attached to the product. These labels contain for example barcode to be scanned later. Each company can have its own, specific layout. Tap Back to return to the GR PO screen.

The image shows the 'Print Labels' screen. It has a title bar with a Windows logo and standard mobile UI icons. The 'Remarks' field is set to 'A1000 * Normal paper'. The 'Quantity' field is set to '5 pcs'. The 'UoM' field is set to 'pcs'. The 'Labels' field is set to '1'. The 'Printer' field is set to 'Mobile Zebra 01'. The 'Print' button is highlighted with a red box.

After setting the quantities in the GR PO screen the user can tap Done to progress.

2.1.4. Posting the Goods Receipt PO

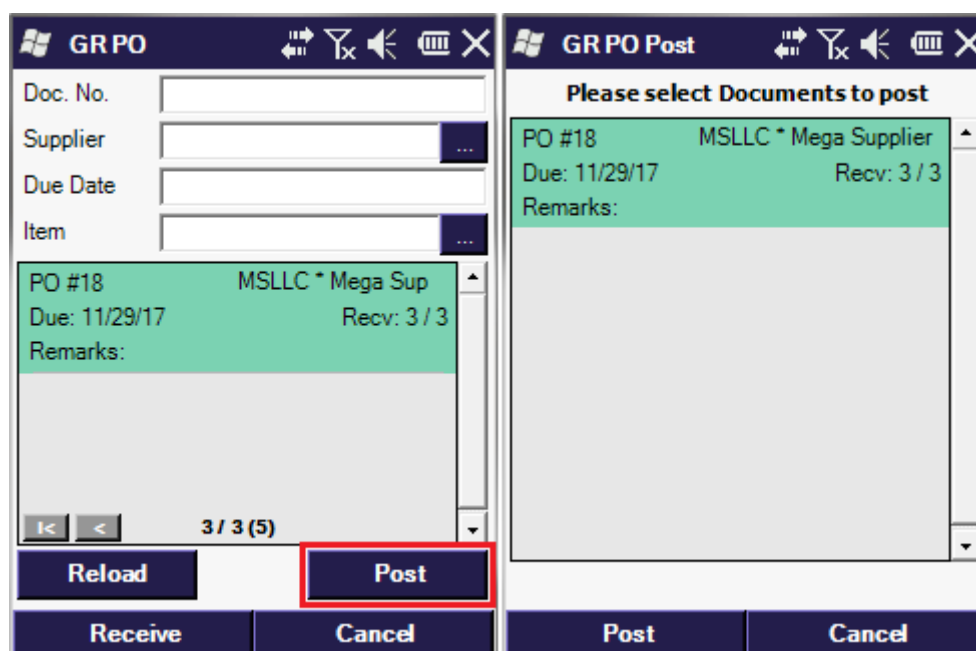
If the warehouse uses bin locations the user will be prompted the bin location selection form to enter the bin location(s) to which the item will be received. If the warehouse has no bins or the items are normal (not a batched or serialized items) the window will not be prompted.

In most of the scenarios the bin location and batch/serial selection form will be presented as a professional company relies heavily on these features. This is explained in the next section.

In this example the bin location selection form is not prompted as the 'A1000 Normal Paper' is a normal item and the warehouse '02' does not use bin locations.

In this simple example the user will be taken back to the main GR PO screen. It can be seen below, that an order has been already received and a new option is available, to post some or all received orders. The user can tap Post to go to the GRPO Post screen, where he can specify which orders to post. Posted orders will become bookings in the SAP BO system.

After selecting the entries in the GRPO Post screen the user can tap Cancel to abandon the posting or Post to book the orders. A message will be prompted to confirm a successful posting. Tap Ok to return to the main GR PO screen.



2.1.5. Dealing with Batched or Serialized Items and Bin Locations

As mentioned before, after for example adding the quantity of an item in the goods receipt PO there may be extra steps involved. If the warehouse uses bin locations or the item is a batched or serialized item the user will be prompted the bin location and batch / serial selection form.

Bin Location

First the Bin Location can be specified. If set, the bin location must exist in SAP BO or else, the user will receive an error message. The user cannot enter bin locations that are in a different warehouse than the warehouse in the related SAP BO document line. The Bin Location can be left empty, indicating that no bin location is used. If the 'Receiving Bin Locations' setting is enabled in SAP BO, the system will automatically choose a bin location.

Batch

If the item is managed by batches, the user can enter the batch numbers. It is possible to create an

user query for generating the batch automatically. Tap the New button to generate the batch number. For more information see [Batch number generation](#).

Then specify the unit of measure (UoM). For more information see [Managing UoM Groups](#).

It is possible to divide the stock among the bin locations. The functionality of the Add and Upd buttons are the same as before.

Serial

If the item is managed by 'On every transaction' serial numbers, then the user has to add the quantity by scanning the serial numbers. To remove a serial number, select its line and tap the Delete button. It is possible to create an user query for generating serial numbers automatically. Tap the New button to generate the serial numbers automatically. For more information see [Serial number generation](#).

If the item is managed by 'On release only' serial numbers, then simply enter the quantity. The system automatically creates empty (placeholder) serial number records.

Tap the Done button to proceed. The system goes back to the previous screen and saves the entered data. The received quantity in the line of the purchase order is updated with the newly created quantity. The total quantity of batch/serials must be equal to the quantity entered on the GRPO screen.

To go back without saving the changes, tap the Cancel button.

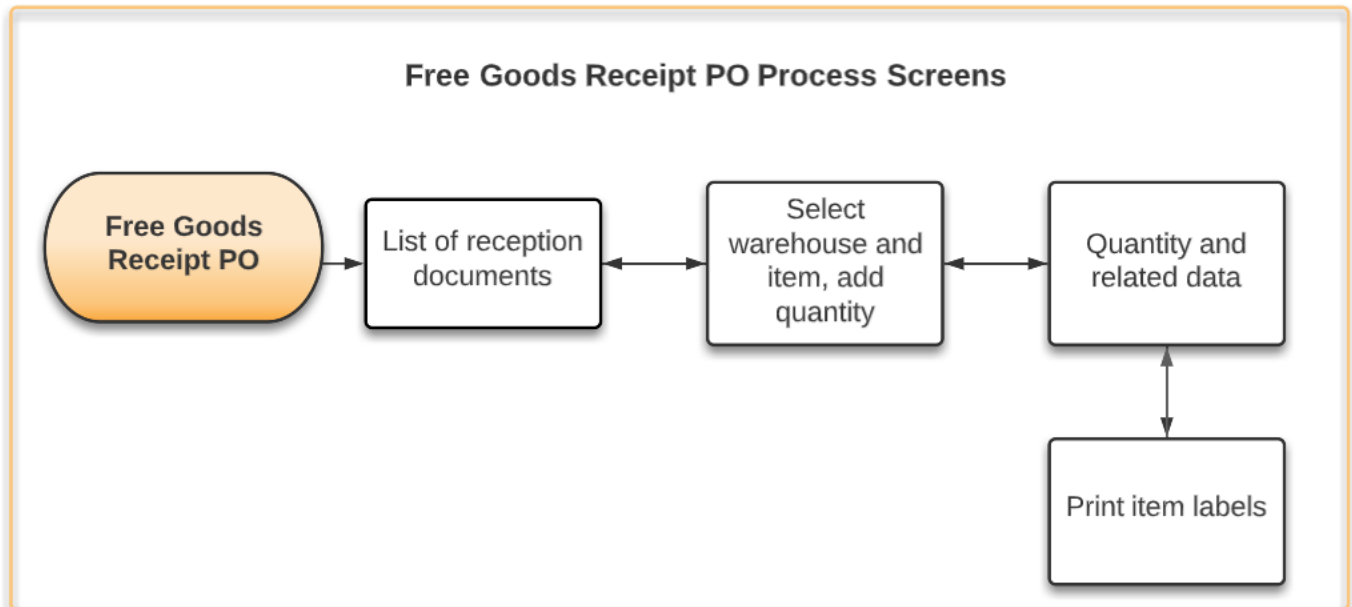
The image displays three screenshots of the GRPO (Goods Receipt Purchase Order) screen, illustrating different item types and their associated data entry fields.

Left Screenshot: Item: B1000 * TESTB1. Bin Loc.: 1-RECEIVING-BIN-LOCATION. Batch: BN112911 (highlighted with a red box). UoM: (empty). Quantity: 5. Buttons: Add, Upd. A list below shows: 01-RECEIVING-BIN-LOCATION, Batch: BN112910, 5.

Middle Screenshot: Item: S1000 * Serial paper. Bin Loc.: 1-RECEIVING-BIN-LOCATION. Serial No.: SN112918 (highlighted with a red box). Buttons: New. A list below shows: 01-RECEIVING-BIN-LOCATION, Serial No.: SN112914; 01-RECEIVING-BIN-LOCATION, Serial No.: SN112915; 01-RECEIVING-BIN-LOCATION, Serial No.: SN112916; 01-RECEIVING-BIN-LOCATION, Serial No.: SN112917.

Right Screenshot: Item: S2000 * Serialized paper. Bin Loc.: 01-ST-P0011 * Pick location. Quantity: 5. Buttons: Add. A list below shows: 01-RECEIVING-BIN-LOCATION, Quantity: 5.

2.2. Free GRPO



To receive stock without a purchase order, tap the Free GR PO button.

Tap the Reload button to see the list of the goods receipt documents in progress. It is possible to filter the documents in progress based on the supplier. Enter the supplier code to the *Supplier* field or select it after tapping the ... button.

To create a new *Goods Receipt PO* document, select the supplier and tap the New button. If there are Goods Receipt documents in progress, two additional buttons are displayed:

- Resume
- Post

To modify the list of items to receive, select the documents and tap the Resume button. To create the *Goods Receipt PO* document in SAP Business One, tap the Post button.

Displayed information:

1. Code of the document in progress
2. Supplier code * Supplier name
3. Number of document lines



On the next screen add the warehouse. To select the warehouse from a list, tap the ... button. Then add the item code to the *Item* field and specify the [UoM code](#).

To select the item from a list, tap the ... button. Enter the quantity to the *Quantity* field. To increase the current value with the entered value, tap the Add button. To replace the current value with the entered value, tap the Upd. button.

Create GR PO

Supplier: V00002 * Vendor 02

Warehouse: ...

Item: ...

UoM: Box

Quantity: Add Upd

Item: B1002B * Batch Paper B1002B
WH: 02 10 Box

Item: S1000S * Serial Paper
WH: 02 10 Pack

Back

If the destination warehouse has bin locations and/or the product is managed by batches or serial numbers, the system will prompt the user to a screen where the batch/serial number(s) and the bin location can be added.

Products can be received into different bin locations from the same warehouse.

It is also possible to adjust the UoM of the product. For more information see [Managing Unit of Measure Groups](#).

Products with different batch numbers can be received. It is possible to create an user query for generating the batch automatically. Tap the New button to generate the batch number. For more information see [Batch number generation](#).

If the item is managed by 'On every transaction' serial numbers, add the quantity by scanning the serial numbers. To remove a serial number, select its line and tap the Delete button. It is possible to create an user query for generating serial numbers automatically. Tap the New button to generate the serial numbers automatically. For more information see [Serial number generation](#).

If the item is managed by 'On release only' serial numbers, add the number of the received items instead of the serial numbers. Enter the quantity to the Quantity field and tap the Add button. The system automatically creates empty (placeholder) serial number records.

Create GR PO

Item

B1001SD * Batch Paper

Bin Loc.

02-DOCKS

Batch

New

UoM

Carton

...

Quantity

Add

Upd

02-DOCKS

Batch: BN23456

5 Carton

Print

Qty

5 of 10

Carton

Done

Cancel

Create GR PO

Item

S1000S * Serial Paper

Bin Loc.

02-DOCKS

Serial No.

SN15105

New

02-DOCKS

Serial No.: SN15101

02-DOCKS

Serial No.: SN15102

02-DOCKS

Serial No.: SN15103

02-DOCKS

Serial No.: SN15104

Print

Delete

Qt

4 of 10

Done

Cancel

Create GR PO

Item

S2000 * Serialized paper

Bin Loc.

01-ST-P0011 * Pick location

Quantity

5

Add

01-RECEIVING-BIN-LOCATION

Quantity: 5

Print

Delete

Qt

5 of 10

Update

Cancel

Tap the Print button to print the item label of the selected item.

Tap the Done button to add the identified products to the list of items to receive or tap the Cancel button to go back without adding the products to the list.

When the system creates the Good Receipt PO document, it checks the existing purchase orders based on vendor, item code, warehouse and card code. If the system finds identical data, it links the Goods Receipt PO document with the purchase order lines based on the doc due date order.

2.3. Goods Return



Overview

This implementation supports serial/batch managed items and bin locations, and considers the Goods Return Request as the base document for Goods Returns.

The purpose of adding a **Return Request (RR)** is to create a pre-step in the return process, allowing the entry of agreed quantities, prices, and return reasons before the goods are actually returned.

From the **Main Menu**, selecting the **Purchasing** entry will lead to the form for creating a **Goods Return**. Initially, the user will be presented with a list of existing goods returns in the SAP BO database. Filters can be used to find relevant return request quickly.

The user can set the filters and tap the **Reload** button to load the relevant data from the database. The grid below the filter fields will be filled with the available goods return entries.

2.3.1. Selecting Goods Return Request

In one entry the user can see:

- **Return Request Document:** The document number
- **Supplier:** Vendor name
- **Due Date:** The return date of the delivery
- **Item:** The item code to be returned

If the user taps **Cancel**, he will be navigated back to the **Main Menu**. The user can select an entry and then tap Return to enter the items and quantities for the **Goods Return**.



2.3.2. Returning Items

At the beginning of the entry the user can also see the return request line status. Only open return request lines are listed here. If the user enters the item number in the **Item field** and leave the field, the line containing the item will be automatically selected. Alternatively the user can select a line manually in the grid.

The user cannot add items that are not in the return request.

Once the item line is selected, the users can enter the quantity they want to return in the **Quantity field** and then click on **Add or Upd**. If the user clicks on **Add** the quantity that was entered will be added to the already set quantity. If the user clicks on **Upd**, the already set quantity will be overwritten with the new quantity.

To cancel an entry, the user can update a quantity to zero.



2.3.3. Posting the Goods Return Request

If a Return Request has already been processed a new option will appear, allowing you to post some or all return requests. When pressed, it will create the Goods Return document with the prepared quantities. Posted Return Request will become bookings in the SAP BO system.

A message will be prompted to confirm a successful posting: **“Successfully posted Goods Return”**. Tap Ok to return.

2.3.4. Batched or Serialized Items and Bin Locations

Bin Location

First the Bin Location can be specified. The bin location must exist in SAP BO or else, the user will receive an error message. The user cannot enter bin locations that are in a different warehouse than the warehouse in the related SAP BO document line. The Bin Location is needed if it is a bin managed warehouse. If the **“Receiving Bin Locations”** setting is enabled in SAP BO, the system will automatically choose a bin location.

Batch

If the item is managed by batches, the user can enter the batch number. Then specify the unit of measure (UoM). For more information see Managing UoM Groups.

It is important to note that any batch in stock can be released here, not just those listed on the GR PO used as the base document for the Goods Return Request.

It is possible to divide the stock among the bin locations. The functionality of the Add and Upd buttons are the same as before.

Serial

If the item is managed by serial numbers, then the user has to add the quantity by scanning the serial numbers. To remove a serial number, select its line and tap the **“Delete”** button.

Tap the **“Done”** button to proceed. The system goes back to the previous screen and saves the entered data. The returned quantity in the line of the goods return request is updated with the newly created quantity. The total quantity of batch/serials must be equal to the quantity entered on the Goods Return screen.

To go back without saving the changes, tap the **“Cancel”** button.



3. Production

3.1. Issue for Production



Select the Issue option in the Main Menu under the Production section.



Select a Production Order using the filters available then tap 'Issue'. Possible filters:

- Production order number
- Product code
- Due date
- Warehouse

Only 'Released' production orders will be listed.

On the next screen every component from the selected production order with 'Manual' issue method are listed.

Select the item you would like to issue. Enter the quantity then tap 'Add'.

If the source warehouse has bin locations, and/or the item is managed by batches/serial numbers, the system proceeds to a screen where the bin location, batch or serial numbers can be added.

- If the warehouse is managed by bin locations, specify the source bin location. It is possible to issue materials from multiple bin locations. Only bin locations from the warehouse that was defined for the material on the production order can be entered.
- If the material is managed by batches, specify the batch number. It is possible to issue stock from multiple batches.
- If the material is managed by serial numbers, scan the serial numbers to issue.

To select the stock from a list, tap the **Find Stocks** button. On the following screen you can see all the items on stock. Select the stock on the list and tap the **Select** button.

After you are finished, tap the **Update** button.

The system will automatically select the next line with open quantity to issue. If the '*Keep focus on prepared line (all processes)*' option is set to true on the [Produmex Scan General tab](#) of Produmex Scan settings, then the last issued line will be selected.

Issue the next material or tap **OK** to finish the process.

Issue > Prod

Prod. Order4 * 11/29/17

Item Filter

UoM

Quantity

Add

Upd

#1A3000 * Normal paper

✓WH: 015 / 5 pcs

#2B2000 * Batch paper

✓WH: 015 / 5

#3S1000 * Serial paper

WH: 010 / 5

OK

Issue > Prod

Pr. Ord. No.

Product

Due Date11/29/17

Warehouse01

#411/29/17WH: 01

B3000 * Batch paper

Iss: 2 / 3

Remarks:

Reload

Post

Issue

Back

Back to the issue screen, you can select your constructed issue for production transaction. Tap the Post button to generate the *Issue For Production* document in SAP Business One.

3.2. Return Components



Select the Return option in the Main Menu under the Production section.



Select a Production Order using the filters available then tap Return.

In the following screen you can see all the items associated with the Production Orders, for which some quantity has already been issued and can therefore be returned. Select an item, type in a quantity, then tap Add.

You can plan that which items to which bin should be selected to return. You can add items with the Add button. If the material is managed by batches, enter the batches as well. If the material is managed by serial numbers, scan the serial numbers to return.



Continue constructing the return from production in the manner explained. When you are finished, tap Done.
Back to the return components screen, you can select your constructed return from production and tap Post, to generate the Return From Production document in SAP BO.

3.3. Receipt for Production



Select a Production Order using the filters available then tap Receive.

On the next screen specify the received quantity. If you have a flawed product, check the Rejected checkbox while adding the product.

If the warehouse has bin locations, add the destination bin location to the Bin Loc. field. The set bin location must exist in SAP BO.

If the product is managed by batches, enter the batch number to the Batch field. The received products can be split into multiple batches. The total entered quantity must be equal to the received quantity. It is possible to create a user query for generating the batch automatically. Tap the New button to generate the batch number. For more information see [Batch number generation](#).

If the product is managed by 'On every transaction' serial numbers, scan the received serial numbers. The number of the serial numbers must be equal to the received quantity. It is possible to create a user query for generating the serial numbers automatically. Tap the New button to generate the batch number. For more information see [Serial number generation](#).

If the product is managed by 'On release only' serial numbers, enter the received quantity. The system automatically creates empty (placeholder) serial number records.

on the Receipt from Production screen select the order and tap Post to generate the Receipt From Production document in SAP B1.

Receipt < Prod

Item

B3000 * Batch paper

Bin Loc.

1-RECEIVING-BIN-LOCATION

Batch

BN291111

New

UoM

...

Rejected

☐

Quantity

3

Add

Upd

01-RECEIVING-BIN-LO

Rejected: No

Batch: BN291110

2

Print

Qty

2 of 5

Update

Cancel

Receipt < Prod

Item

A1000 * Normal paper

Warehouse

02

UoM

pcs

...

Rejected

☒

Quantity

Add

Upd

WH: 02

Rejected: No

1 pcs

WH: 02

Rejected: Yes

1 pcs

Print

Qty

2 of 3 pcs

Update

Cancel

In the Receipt from Production screen select the order and tap Post to generate the Receipt From Production document in SAP B1.

Receipt < Prod

Pr. Ord. No.

Product

...

Due Date

Warehouse

...

#4

11/29/17

WH: 01

B3000 * Batch paper

Recv: 5 / 5

Remarks:

#5

11/29/17

WH: 02

A1000 * Normal paper

Recv: 0 / 3 pi

Remarks:

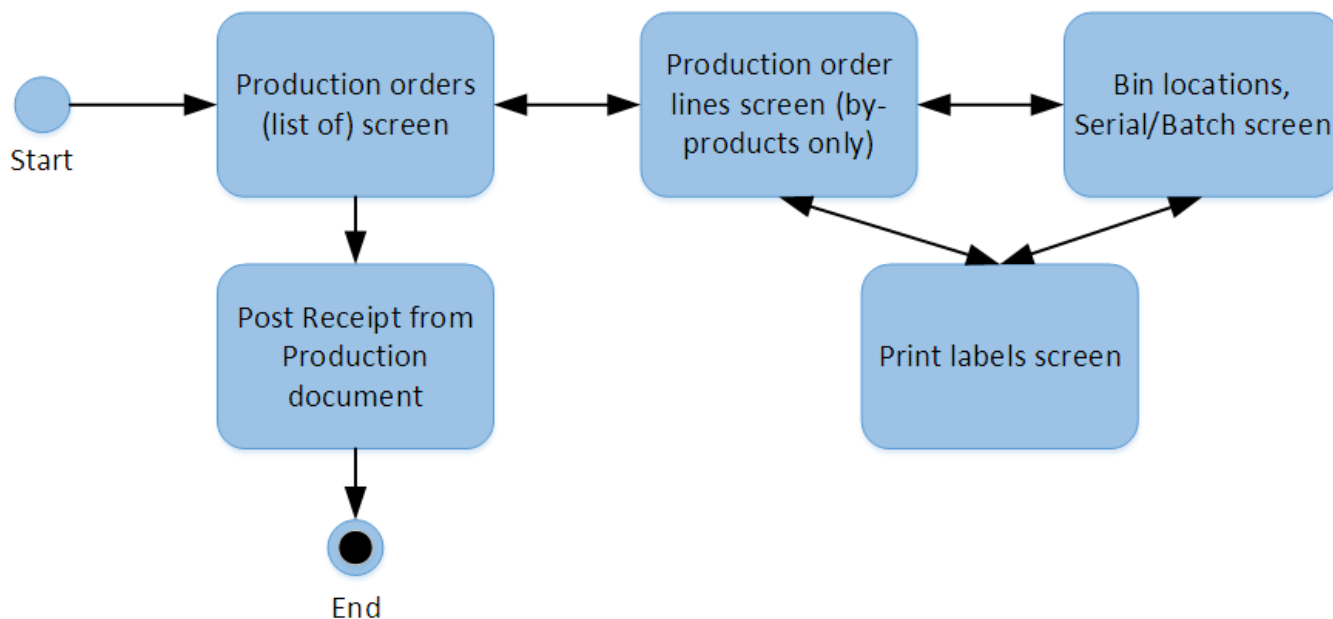
Reload

Post

Receive

Back

3.4. By-product



To receive by-products from a production, tap the By-Products button.

On the next screen tap the ReLoad button to load the production orders. Every released production order that contains a by-product will be listed on the screen.

The production orders can be filtered with the following fields:

- Pr.Ord.No.: Filter down the list to the production order with the added production order number.
- Product: Filter the list based on the main product.
- Due date: Filter down the list to production orders with the selected due date.
- Warehouse: Filter the list based on the warehouse.

Tap the ReLoad button to apply the filters.

Select a production order and tap the Receive button to receive the by-product(s). Tap the Back button to go back to the Main Menu.

The screenshot shows the 'By-Products' screen in a mobile application. At the top, there is a title bar with the text 'By-Products' and several icons. Below the title bar, there are four input fields for filtering: 'Pr. Ord. No.', 'Product', 'Due Date', and 'Warehouse'. Each field has a corresponding dropdown arrow. Below the input fields, there is a list of production orders. The first item in the list is highlighted in green and contains the following information: '#3', '05/10/17', 'WH: 02', 'B1001SD * Batch Paper', 'Recv: 0 / 1', and 'Remarks:'. Below the list, there are three buttons: 'Reload', 'Receive', and 'Back'.

The system will proceed to the next screen where the by-products from the production order are listed. Scan or select the item then enter the quantity. To increase the current value with the entered value, tap the Add button. To replace the current value with the entered value, tap the Upd . button.



It is also possible to adjust the UoM of the by-product. For more information see [Managing Unit of Measure Groups](#).

If the destination warehouse for the main product has bin locations and/or the by-product is managed by batches or serial numbers, the system will prompt the user to a screen where the batch/serial number(s) and the bin location can be added.

- It is possible to receive by-products with different batch numbers. By-products can be received into different bin locations.
- If the item is managed by 'On every transaction' serial numbers, add the quantity by scanning the serial numbers. To remove a serial number, select its line and tap the Delete button.
- If the item is managed by 'On release only' serial numbers, simply enter the received quantity. The system automatically creates empty (placeholder) serial number records.



To go back to the list of by-products tap the Done button. To print the product label, select the line and tap the Print button. On the next screen select the printer and add the number of labels to print. Tap the Print button to [print the label](#) or tap the Back button to go back without printing.

After the total quantity has been added the system will automatically go back to the list of by-products. Tap the Done button to go back to the list of production orders.

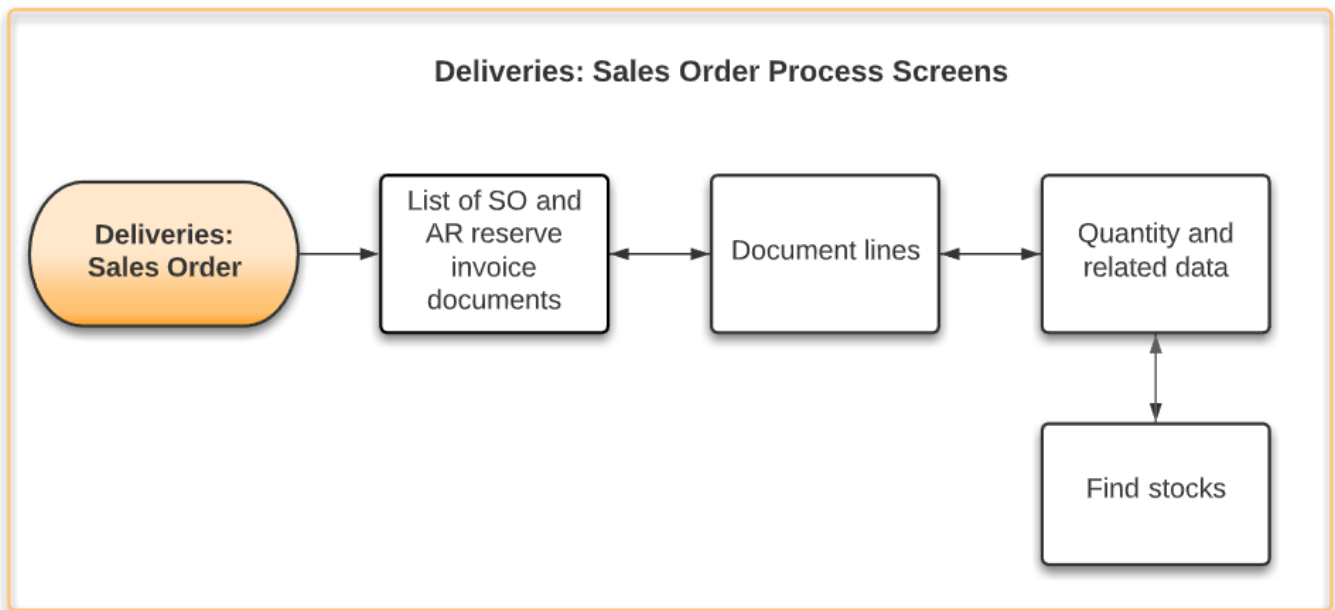


After the total quantity has been added, the system goes back to the previous screen. Select the next by-product or tap the Done button to finish the reception.

To create the *Receipt from production* document, select the line of the production order and tap the Post button. The Post button is only active if there are already identified by-products for the production order.

4. Deliveries

4.1. Sales Orders



From the Main Menu the **“Sales Order”** entry leads to the form that can be used to **create a delivery from a sales order or an A/R reserve invoice in SAP BO.**

The user will be prompted a list of the existing sales orders and a list of A/R reserve invoice documents in the SAP BO database.

Filters can be used to find relevant sales orders or A/R reserve invoices quickly. The user can set the filters and tap the **“Reload”** button to load the relevant data from the database. The grid below the filter fields will be filled with the available sales order and A/R reserve invoice entries.



The entry contains the document number, the customer's code and its name, the due date and the already delivered lines/all lines. As you can see in this example no deliveries have done yet for the filtered sales orders. If the user taps Cancel, he will be navigated back to the Main Menu.

The user can select an entry and then tap Issue to display the lines of the order. In this example you can see the status for the lines of sales order 2 is open.



There are two possibilities to select a line, you can use the read the barcode, or you can add it manually from the list. Once you have added a line, the bin location and the quantity is required.

Assembly BoMs are not supported in this function.

If the sales order contains a Sales BoM item, the Sales BoM item and its components are listed on the screen. Issue only the components.

Batch

If the item is managed by batches, scan/enter the batch number and the quantity to deliver from that

batch.

Serial number

If the item is managed by serial numbers, scan the serial numbers to deliver.

The total quantity must be equal to the quantity entered on the previous screen in order to proceed.

With the Find Stock function, the user has the opportunity to look for further information about the related item in the warehouse.



After tapping the Done button, you can see that 5 cartons from the 10 ordered will be delivered. Repeat this step as much as it is necessary. After that you have selected and add the item to be delivered, you can proceed to post it. If the transaction was successfully posted, you will receive a confirmation.

Sales Order

Doc. No.

Customer

Due Date

Item

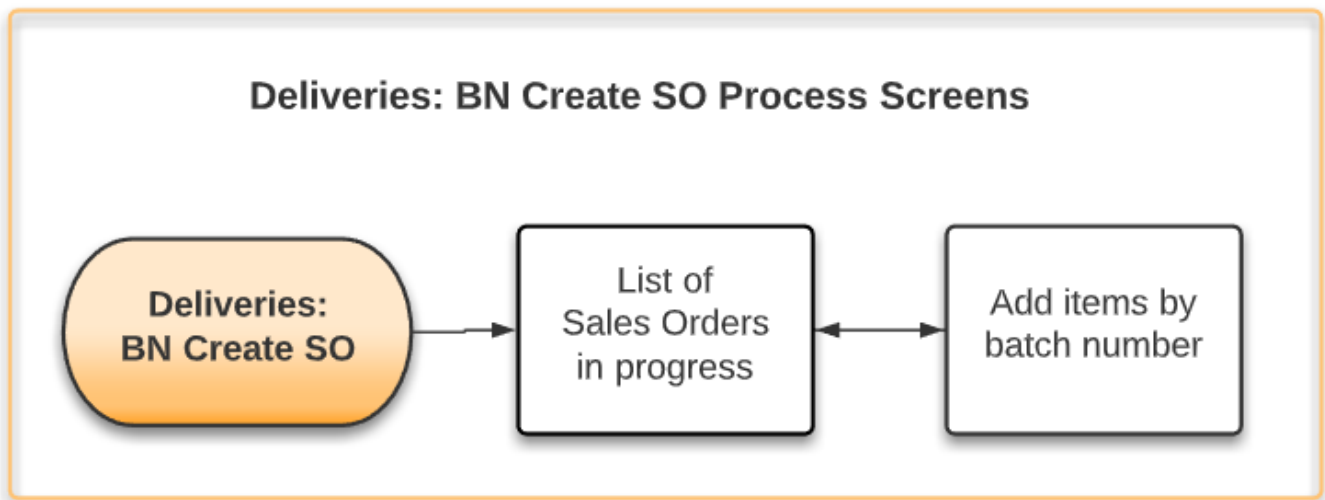
SO #1 C00001 * Customer 01
Due: 05/10/17 Delv: 1 / 2
Remarks:

SO #2 C00001 * Customer 01
Due: 05/08/17 Delv: 0 / 2
Remarks:

Reload **Post**

Issue **Cancel**

4.2. BN Create SO



With the BN Create SO function a sales order can be created based on the batch from the mobile device.

First add the customer to the Customer field. To select the customer from a list, tap the ... button. To create a new sales order tap the New button

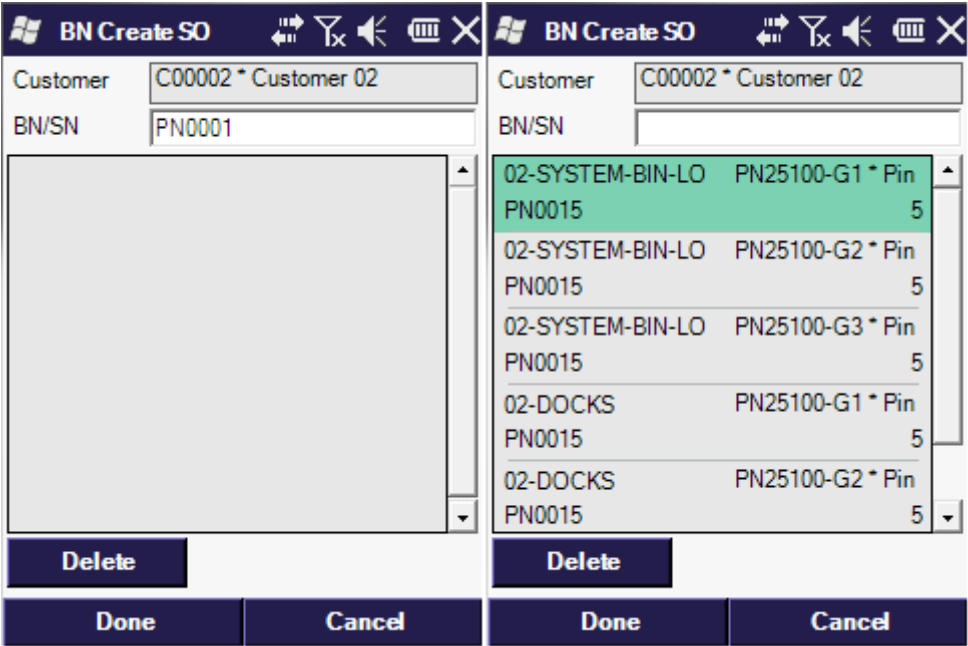
To see the list of the preliminary sales orders, tap the Reload button. Note: The preliminary sales orders do not exist in SAP Business One.



On the next screen scan the batch/serial number. Stock with the scanned batch number will be listed on the screen. Different items and stocks stored in different bin locations are listed on separate lines.

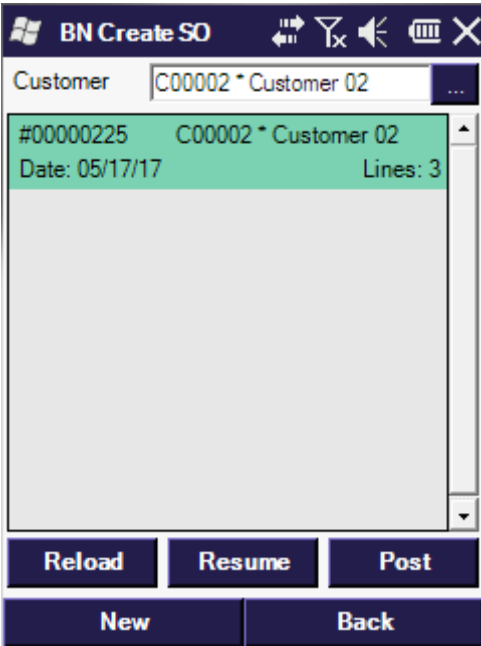
To remove a product from the list, select its line then press the 'Delete' button.

Scan the next batch number or tap the Done button to create the preliminary sales order.

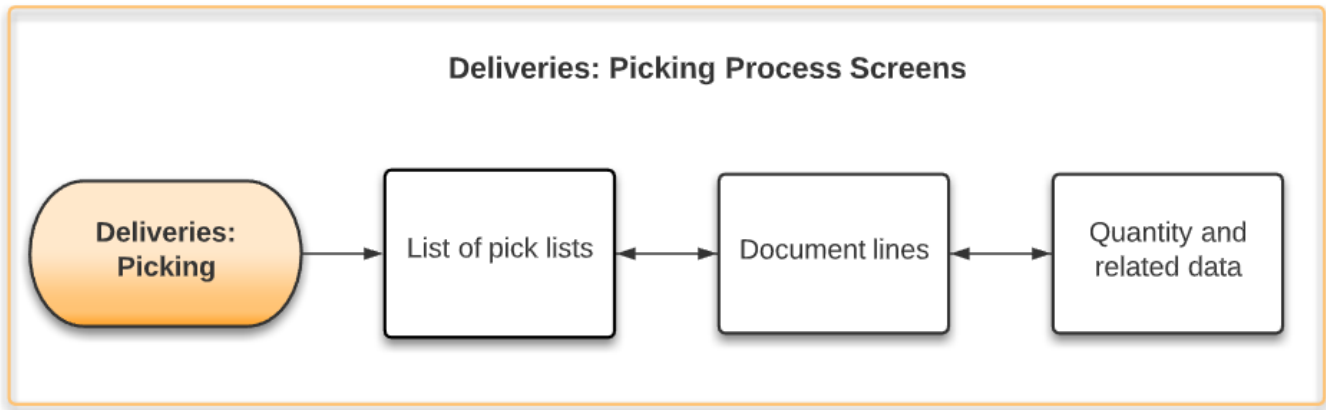


The system returns to the list of the preliminary sales orders.

- Tap the ReLoad button to reload the screen.
- Tap the Resume button to adjust the selected preliminary order.
- Tap the Post button to create the sales order from the selected preliminary order. The sales order will be created in SAP Business One.



4.3. Picking



After a picklist is created in SAP Business One, it can be picked on the shopfloor with the Picking function.

Produmex Scan supports the following base documents for picklists:

- Sales order
- Production order
- Inventory Transfer Requests
- A/R Reserve Invoice

Note: Picklist with mixed base document type are not supported.

Note: The standard SAP Business One setting Document settings - Picklist - Exclude Non-Inventory Items from Pick and Pack Manager is not supported



On the first screen select the picklists to pick. Tap the ReLoad button to list the open picklists. It is possible to filter the list with the following criteria:

- Picklist No: The Pick Number of the picklist.
- Customer: The customer card code.
- Due Date: The Pick Date of the picklist.
- Item: The item code. Only picklists that contain the given item will be listed.
- Warehouse: The warehouse code. Only picklists from the given warehouse will be listed.

Tap the ReLoad button to apply the filters.

If the *Allow working on already taken Pick Lists* setting is disabled on the [Produmex Scan Picking tab](#) of Produmex Scan Settings, then picklists started by another user are not listed. The user who started a picklist is stored in the OPKL.U_BXPEmpID field. You can empty this value to unassign a picklist from the user.

Displayed information:

1. Pick Number of the picklist
2. Pick Date of the picklist
3. Remarks of the picklist
4. Number of open lines on the picklist



Select a picklist and tap the Pick button to start the picking.

On the next screen the open picklist lines are listed. Picklist lines for serial managed items are consolidated if

- the item code, the base document and the source bin location are identical and
- the item is listed in one single line on the base document and it is split into multiple lines on the picklist.

The stock list can be filtered based on the bin location. Add the bin location code to the Bin/Item field. If the bin location appear only once on the list, the given stock line will be automatically selected.

Note: Assembly BoM's are not supported in Produmex Scan.

The lines are sorted by:

1. Line Status
2. Alternative Sort Code of the Bin Location
3. Bin Location code
4. Item code

Displayed information:

1. Picklist Line Number
2. Line Status. Possible values:
 - Open
 - Picked
 - Closed
3. Base document type. Possible values:
 - SO: Sales order
 - TR: Inventory Transfer Request
 - PW: Production order
 - IN: A/R Reserve Invoice
4. Item code and description
5. Bin Location
6. Picked quantity/Quantity to pick
7. Batch number

Scan the item or select the stock line and tap the Pick button to start the picking.



On the next screen add the quantity to pick. The quantity to pick cannot exceed to open quantity on the picklist line.

- If the warehouse has bin locations, an additional 'Bin Loc.' field is displayed and instead of the Warehouse field, the 'Rec.Bin' field is displayed. Add the source bin location to the 'Bin Loc.' field.
- If the item is managed by batches, additional 'Rec.Batch' and 'Batch No.' fields are displayed. Add the batch number to the 'Batch No.' field.
- If the item is managed by serial numbers, an additional 'Serial No.' field is displayed. Add the

picked quantity by scanning the serial numbers one-by-one.

- If the item has UoM groups, select the UoM before entering the quantity by tapping the ... button next to the UoM field. For more information see [Managing UoM Groups](#).

If the *Allow changing bin/batch/serial allocations for Picking* setting is not enabled on the [Produmex Scan Picking tab](#) of Produmex Scan Settings, only the stock allocated on the picklist can be picked, otherwise it is possible to pick from a different bin location or to pick a different batch/serial number.

Tap the Find Stocks button to select the stock to pick from a list.

On the next screen the available stock is listed. Select the stock from the list and tap the Select button.

- If the item is managed by batches, tap the Ser./Bat. button to select the batch number. If the Bin Location field was filled on the Picking screen, the list is filtered by the bin location. If the Batch field was filled on the Picking screen, the list is filtered by the selected batch.
- If the item is managed by serials, tap the Ser./Bat. button to see the list of available serial numbers.

After the stock is selected, the Bin Location and the Batch/Serial field will be automatically filled.

Tap the Post button to save the entered data. When a picklist is fully picked, that is, there is no more open line on the picklist, Produmex Scan displays the text Picked and a green checkmark on the right side of the screen.

If the Real-Time Picking option is enabled on the [Produmex Scan Picking tab](#) of Produmex Scan Settings, the picked quantity is automatically added to the SBO Pick List after the Post button is pressed.

Now you can continue the picking of the item on the same location or go back to the picklist lines screen by tapping the Back/Cancel button.

It is possible to speed up the picking by enabling various settings on the [Produmex Scan Picking tab](#) of Produmex Scan Settings.

- If the *Speed Picking* option is enabled, the system automatically jumps back to the Picklist lines screen after the Post button is tapped. The next open picklist line is automatically selected on the picklist Lines screen.
- If the *Sequential Picking* option is also enabled, the next open picklist line is opened on the Picking Line Details screen after the Post button is tapped. The control only jumps back to the Pick List Lines screen when the last line has been picked.

Produmex Scan also offers a mode designed especially for *Point of Sale* terminals. Enable the *Streamlined Picking* option. If this option is enabled, then scanning the item code automatically adds one to the picked quantity.

Note: Streamlined picking works only if the item is not managed by batches or serial

numbers and the warehouse has no bin locations. If the item is managed by batches/serials, the batch/serial number must be added during picking. If the warehouse has bin locations, the source bin must be entered during the picking.



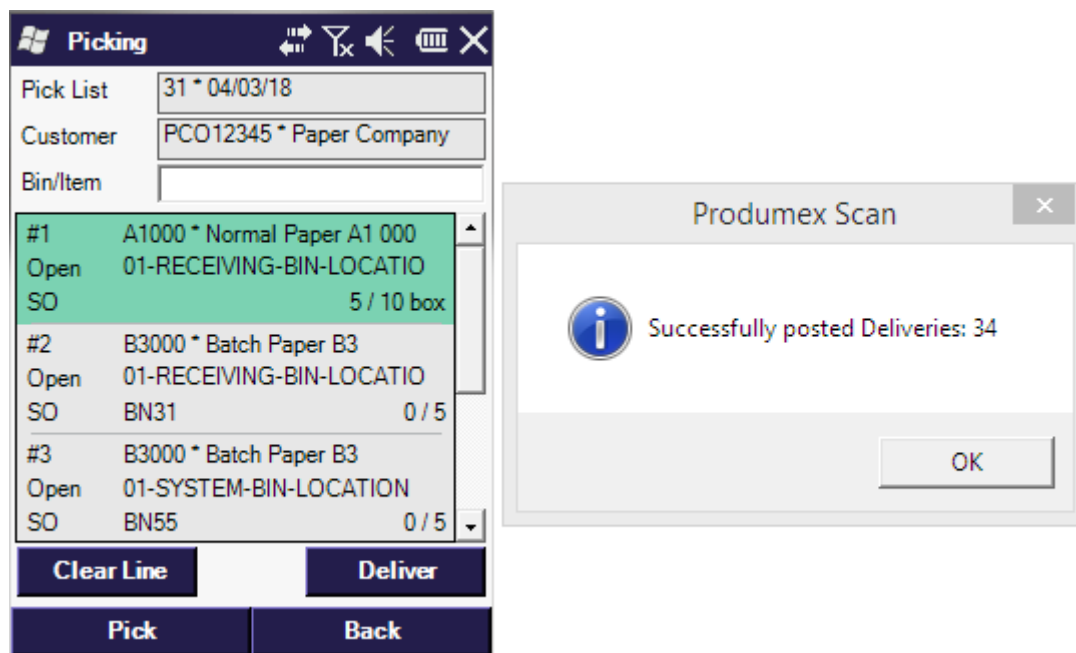
Back on the picking screen you can finish the picking or clear the entered data.

If there is already picked stock for the selected line and non real-time picking is used, an additional Clear Line button is displayed. Press this button to delete the prepared quantities for the selected line. The picked quantity is set to zero.

Base document: Sales order and A/R Reserve Invoice

Tap the Deliver button to deliver the picked stocks. Produmex Scan closes the picklist line and creates the delivery document with the picked quantities. If the delivery can be created, you will get a message with the delivery number.

The system automatically closes the picklist line(s) of the delivered items, even if the total ordered quantity was not picked for the item.



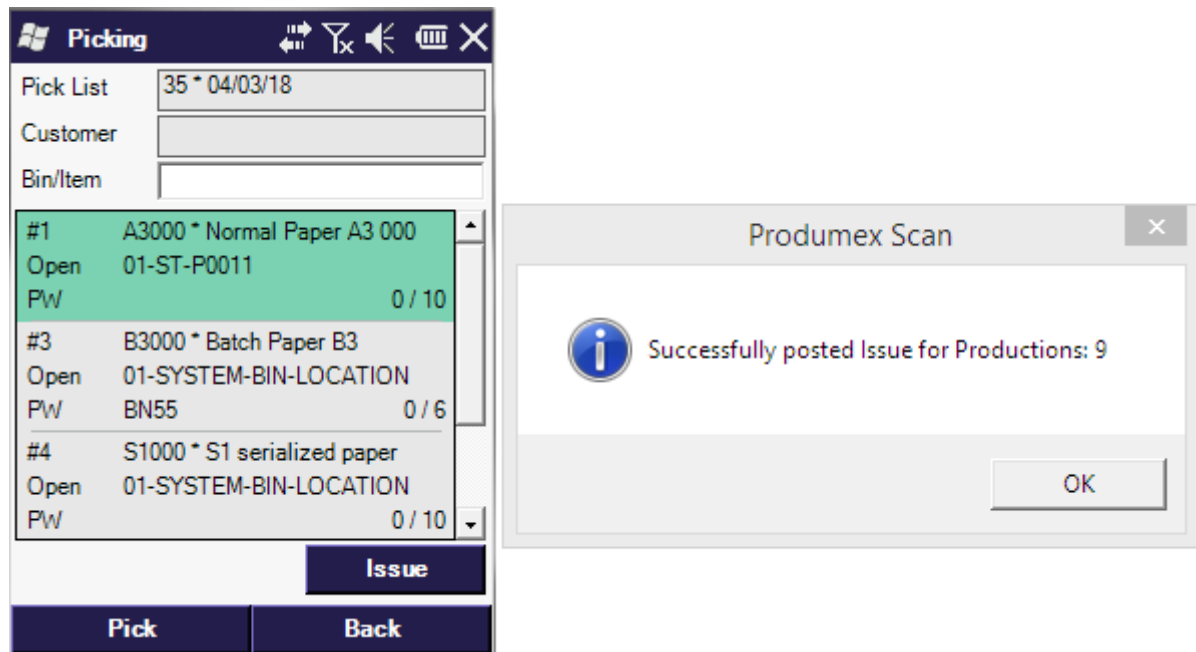
Note: Because of an SAP issue, when multiple batches are allocated for the same sales order line, the batch number suggestion is not displayed on the screen in case of a warehouse not managed by bin locations. It is recommended to use a warehouse managed by bin locations.

Base document: Production order

If the base document of the picklist is a production order, an Issue button is displayed instead of the

Deliver button. Tap the Issue button to create the Issue for production document for the already picked stock. If the document can be created, a message containing the Issue for production document number is displayed.

The system automatically closes the picklist line(s) of the issued items, even if the total ordered quantity was not picked for the item.

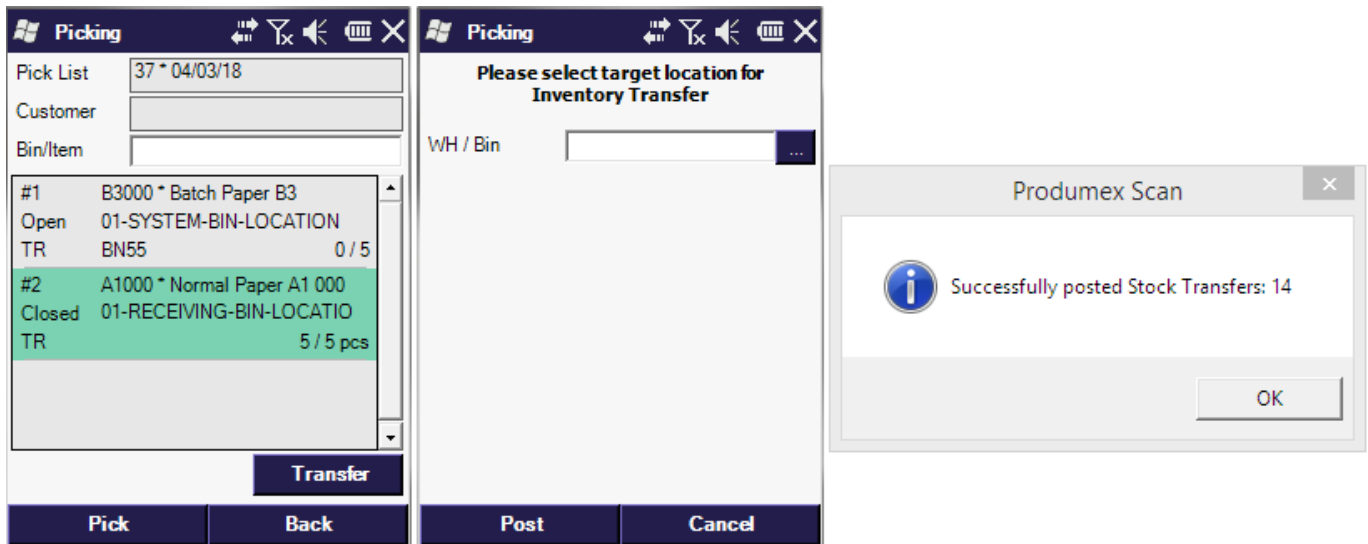


Base document: Inventory Transfer Request

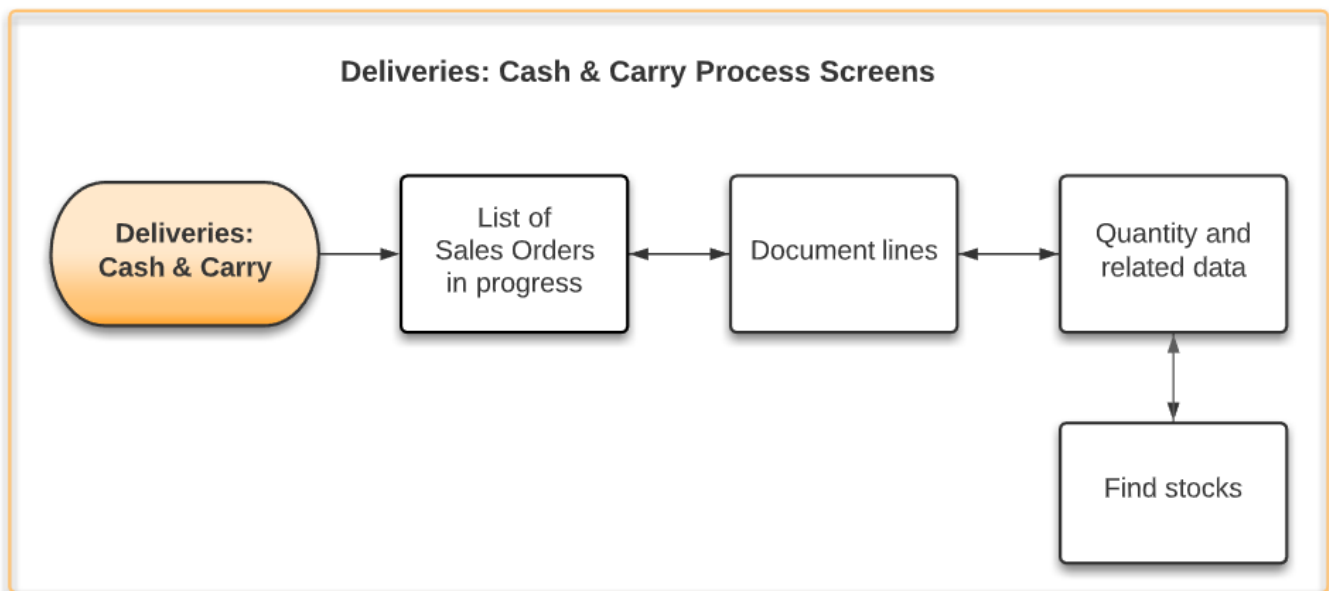
If the base document of the picklist is an Inventory Transfer Request, a Transfer button is displayed instead of the Deliver button. Tap the Transfer button to create the Inventory Transfer document for the already picked stock. On the next screen enter the destination bin location or the warehouse. The warehouse can also be selected from a list after tapping the ... button.

If the document can be created, a message containing the Inventory Transfer document number is displayed.

The system automatically closes the picklistline(s) of the transferred items, even if the total ordered quantity was not picked for the item.



4.4. Cash & Carry



With this function you can create cash & carry delivery for a customer and pick the items you want to deliver.

You can create a new delivery or proceed with an already started one.

- To create a new delivery, add the customer code to the Customer field and tap the New button.
- To proceed with a started delivery, tap the Refresh button and select the delivery from the list. The list can be filtered based on the customer.
- To post a delivery, select it from the list and tap the Post button.



On the next screen scan or select the following:

- Warehouse
- Item code. Note: Only Inventory items can be scanned or selected.
- UoM

Add the quantity you would like to deliver and tap the Add or Upd . button.

If the warehouse has bin locations, and/or the item is managed by batches/serial numbers, a new screen opens.

If the warehouse has bin locations, add the bin location. It is possible to deliver stock from multiple bin locations. The total quantity must equal to the quantity added on the previous screen.

If the item is managed by batches, enter the batch number. It is possible to deliver stock from multiple batches. The total quantity must equal to the quantity added on the previous screen.

If the item is managed by serials, scan the serial numbers. Even if the item is managed by 'On release only' serial numbers, the serial number have to be defined. The number of the scanned serial numbers must equal to the quantity added on the previous screen.

You can check the actual stock with the Find Stocks button, enter the bin location and tap Add or Upd.

The stocks you entered will be listed in the grid. Tap Done if you are finished adding the stock to deliver. You will return to the item selection screen, where you can tap Post to create the delivery in SAP BO.



If the delivery can be created, you will get a message with the document number of the new delivery.

If you tap Back instead of Post, the delivery lines will be added to the mobile transaction data, but the delivery will not be created. You can come back later on, and enter the customer code tap Reload then select your delivery and tap Resume. This way you can continue working on the same delivery without posting it.

4.5. Packing (Delivery)



The Packing function can be started from the Warehouse main menu.

On the Packing (list of deliveries) screen, you can select from a list or it is possible to input a Delivery number and press Reload to filter to only that delivery document number. After selecting the Delivery document, tap the Pack button to start Packing that order.



On the next screen, you can see the Packing data for the Delivery. First the list of packages will be empty (unless it has been already defined in SAP). You have to enter a package number (eg. 1) then press Pack to start packing into that package.



Optionally, the New button can be used to automatically generate a package number with the customizable user query

bx_mobile_wh9_get_new_delivery_packagenumber.

- The name of the result column: BXDLPKNM
- The type of the result column: nvarchar
- Parameters that can be used in the query:
 - [%1] empID
 - [%2] docEntry

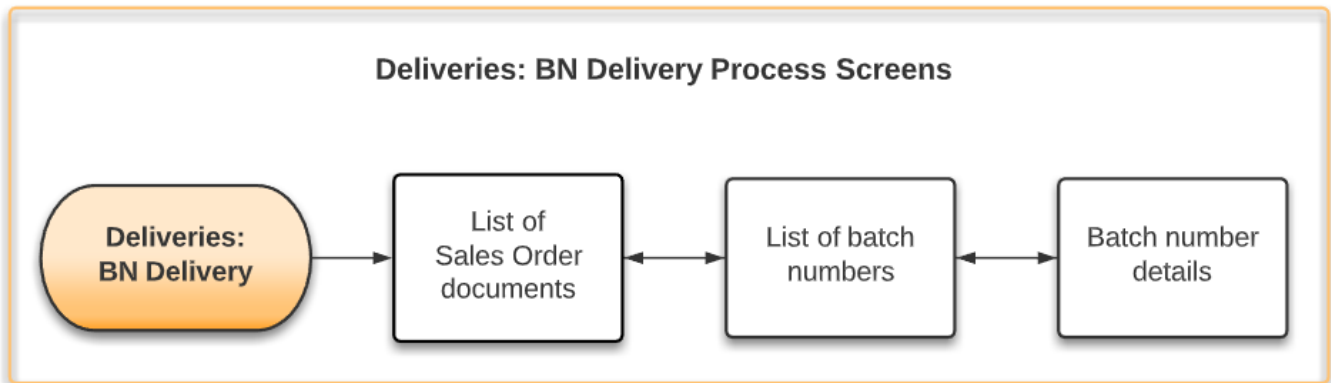
The Pack button will take you to the Packing - Package contents screen where the list of not-yetpacked items is displayed. You can select a line from the list or you can scan an Item code in the appropriate field. After a line is selected, you can enter a quantity and tap Add / Upd button to set that quantity packed.

The screenshot shows the 'Delivery' screen and a 'Packing Slip' window. The 'Delivery' screen has fields for Customer (C00001), Name (Customer 01), Contact Person, Customer Ref. No., Local Currency, No. (Primary), Status (Open), Posting Date (05/04/17), Delivery Date (05/04/17), and Document Date (05/04/17). The 'Packing Slip' window has a 'Contents' section with a table of Item/Service Type, Item No., and Quantity. It also has a 'Packing Slip' section with a table of Existing Packages, a table of Available Items, and a table of Package Contents. The 'Existing Packages' table has columns: #, Package No., Type, Total Weight, and Units. The 'Available Items' table has columns: #, Item Number, Available, and Selected. The 'Package Contents' table has columns: #, Item Number, Quantity, and UoM Name. The 'Package Contents' table shows item A1000 with a quantity of 10. The 'Available Items' table shows item B1001SD with an available quantity of 5. The 'Contents' table shows item A1000 with a quantity of 1 and item B1001SD with a quantity of 2. The 'Packing Slip' window has buttons for 'Update' and 'Cancel'.

It is also possible to select one or multiple lines from the list and press 'Pack selected'. This will set all

of the line item quantity to be packaged into the package. When you tap the Done button, packing data is recorded into SAP.

4.6. BN Delivery



With the BN Delivery function items can be picked and delivered based on their batch and a sales order created from the 'BN Create SO' function.

Tap the ReLoad button to see the list of sales orders. Every sales order that contains at least one open line with an allocated batch will be listed. It is possible to filter the list with the following values:

- Doc. No.
- Customer
- Due Date
- Item

Tap the ReLoad button again to apply the filter(s).

Note: This function is only meaningful for sales order created with the 'BN Create SO' function. It is not recommended to create the delivery for sales orders not created with the 'BN Create SO' function.

BN Delivery

Doc. No.

Customer

Due Date

Item

SO #2 C00001 * Customer 01
Due: 05/08/17 Delv: 0 / 2
Remarks:

SO #4 C00001 * Customer 01
Due: 05/08/17 Delv: 0 / 1
Remarks:

Reload

Issue Cancel

Select the sales order and tap the Issue button.

On the next screen batches allocated for the sales order are listed. Scan the batch number to pick the items. Already scanned batch numbers are marked with a green tick icon.

Displayed information:

1. Sales order number*Customer name
2. Batch number
3. First bin location
4. Number of picked sales order lines/Number of sales order lines with the batch allocated



Tap the Details button to see the details of the picked stock on the selected line. On the next screen the stock to pick is listed. Different items and stocks stored on different locations are displayed on separate lines.

Tap the Delete button to remove an entry from the list. Tap the Done button to go back to the previous screen.

Scan the next batch number or tap the Done button to finish the picking. The system will return to the list of sales orders.

Batch Details

Sales Order16 * Customer 02

Batch No.PN0015

02-SYSTEM-BIN-LO	PN25100-G1 * Pin	
PN0015		5
02-SYSTEM-BIN-LO	PN25100-G2 * Pin	
PN0015		5
02-SYSTEM-BIN-LO	PN25100-G3 * Pin	
PN0015		5
02-DOCKS	PN25100-G1 * Pin	
PN0015		5
02-DOCKS	PN25100-G2 * Pin	
PN0015		5

Delete

Done

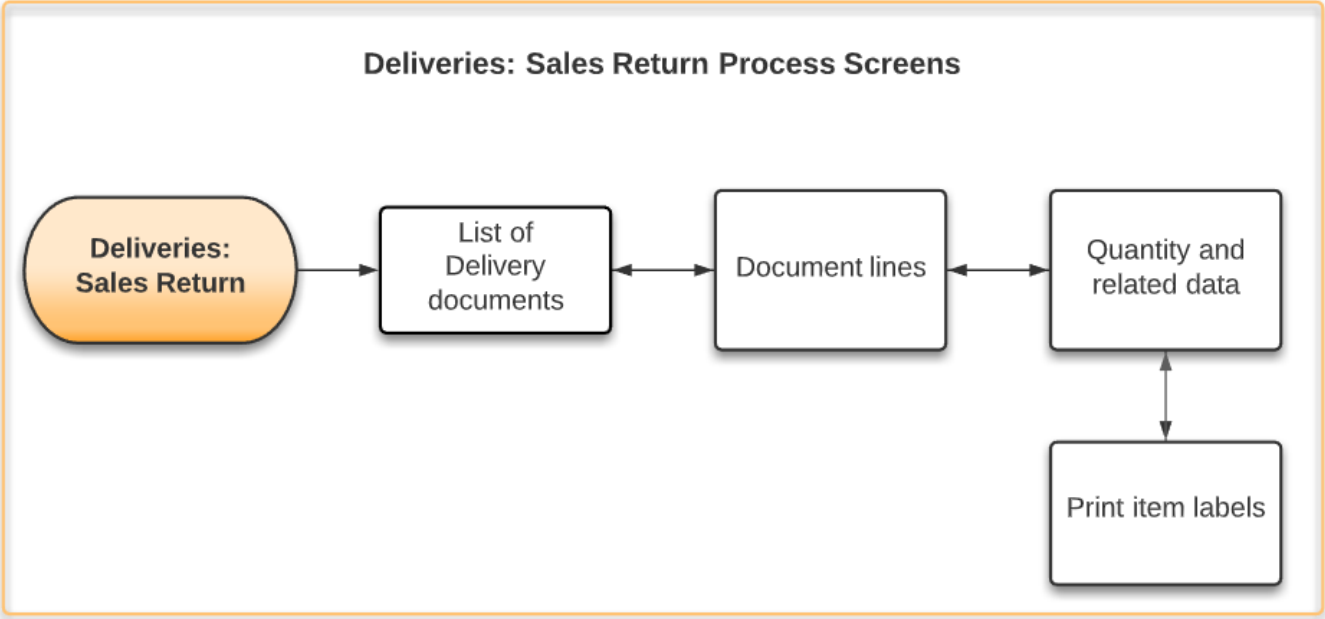
Select the sales order and tap the Post button to create the delivery document. The *Delivery* document will be created in SAP Business One.



4.7. Sales Return

There are two ways to perform a Sales Return, both are accessible directly from the Main menu of the client. One method is a Delivery-based Sales Return “Sales Ret. SDN”, the other is a Request-based one.

4.7.1. Sales Return based on Delivery Document Number



The Sales Return SDN process uses a Delivery document as an input. The result is a Sales Return document.

To receive returned items, select the Sales Ret. SDN option from the Main Menu.

Note that deliveries that are already invoiced are closed, and therefore cannot be selected in the Sales Return SDN process. Invoiced deliveries can be returned with the Credit Note function.

On the next screen enter the filters and tap the ReLoad button to list the Delivery documents.

The following filters can be added:

- Delivery: The delivery document number
- Customer: The customer code
- Due date: The due date of the delivery
- Item: The item code of the item to return

Displayed information:

1. Delivery document number
2. Customer code and description
3. Due date
4. Returned document lines/Open delivery document lines
5. Remarks

The screenshot shows the 'Sales Return' application window. At the top, there's a title bar with a Windows logo and the text 'Sales Return'. Below the title bar, there are four input fields for filters: 'Delivery', 'Customer', 'Due Date', and 'Item'. The 'Item' field is populated with 'A1000 * Nomal Paper A1 00'. Below the filter fields is a list of delivery documents. The first document is highlighted in grey and contains the following information: '#19 1 PCO12345 * Paper Comp 2', 'Due: 01/09/18 3', 'Ret: 0 / 1 4', and 'Remarks: Based On Sales Orders 6. 5'. The second document is highlighted in green and contains: '#29 PCO12345 * Paper Comp', 'Due: 03/30/18', 'Ret: 0 / 3', and 'Remarks:'. At the bottom of the list, there are navigation buttons: 'I<', '<', and '6 / 6 (12)'. Below the list is a 'Reload' button, and at the very bottom are 'Return' and 'Cancel' buttons.

Select the delivery from the list and tap the Return button to start the return.

On the next screen every open line from the Delivery document is listed.

Scan or select the item to receive then add the quantity and tap the Add or Upd . button. The maximum amount is limited by the Delivery document line quantities. If the item has UoM groups, specify the UoM group as well.

Note: Assembly BoM's are not supported.

Sales Return

Delivery29 * Paper Company

Item Filter

UoMbox

Quantity

AddUpd

#1A1000 * Normal Paper A1 000

OpenWH: 01

0 / 5 box

#2B1000 * B1 batch paper

OpenWH: 01

0 / 5

#3S1000 * S1 serialized paper

OpenWH: 01

0 / 5

Done

If the warehouse has bin locations and/or the items are managed by batch or serial numbers, an additional screen is prompted.

- Specify the bin location on this screen. It is possible to receive the item into multiple bin locations, but the total quantity received into the bin locations must be equal to the quantity added on the previous screen.
- If the item is managed by batches, add the batch number, enter the quantity then press 'Add' or 'Upd.'. Only items with the same batch number as the in the Delivery document can be received as a return.
- If the item is managed by serial numbers, add the quantity by scanning the serial numbers. Only items with the same serial numbers as in the Delivery document can be received as a return.

Sales Return

ItemB1000 * B1 batch paper

Original Bin01-SYSTEM-BIN-LOCATION

Bin Loc.01-ST-P0011 * Pick location

BatchBN93121

UoM

Quantity5

AddUpd

PrintQty0 of 5

DoneCancel

Sales Return

ItemS1000 * S1 serialized paper

Original Bin01-RECEIVING-BIN-LOCATION

Bin Loc.01-ST-P0011 * Pick location

Serial No.S11213010

01-ST-P0011

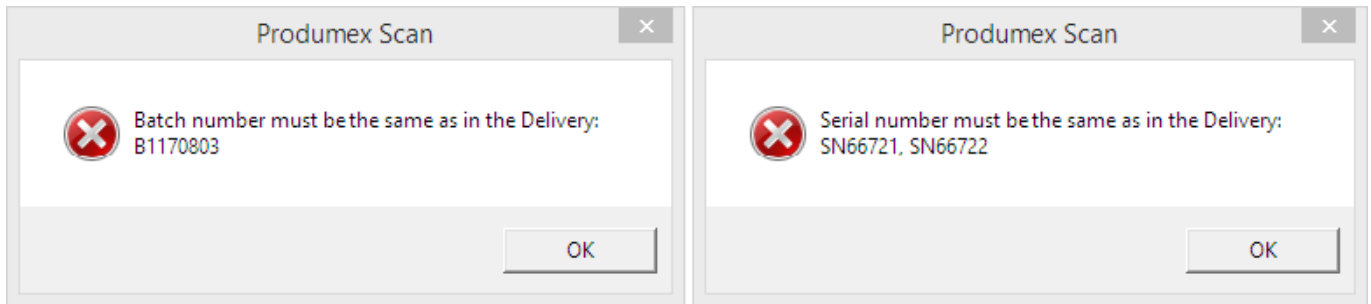
Serial No.: S11213008

01-ST-P0011

Serial No.: S11213009

PrintDeleteQt2 of 5

DoneCancel



Tap the Print button to print the item label.

Tap the Done button to save the entered data and to go back to the previous screen.

Tap the Cancel button to go back without saving.

Continue with the next item or tap the Done button to finish the receipt and to go back to the previous screen.

To create the Return document, select the line of the delivery and tap Post.

4.7.2. Sales Return based on Sales Return Request



The Sales Return SRR process uses a Sales Return Request as an input. The result is a Sales Return document.

To receive returned items, select the Sales Ret. SRR option from the Main Menu.

Note that deliveries that are already invoiced are closed, and therefore cannot be selected in the Sales Return SRR process. Invoiced deliveries can be returned with the Credit Note function.

On the next screen enter the filters and tap the Reload button to list the Return documents.

The following filters can be added:

- SR Request: The Sales Return Request document number
- Customer: The customer code
- Due date: The due date of the return
- Item: The item code of the item to return

Displayed information:

1. SRR document number
2. Customer code and description
3. Return date
4. Returned document lines/Open SR document lines
5. Remarks



Select the request from the list and tap the Return button to start the return.

On the next screen every open line from the SRR document is listed.

Scan or select the item to receive then add the quantity and tap the Add or Upd . button. The maximum amount is limited by the SRR document line quantities. If the item has UoM groups, specify the UoM group as well.

Note: Assembly BoM's are not supported.

If the warehouse has bin locations and/or the items are managed by batch or serial numbers, an additional screen is prompted.

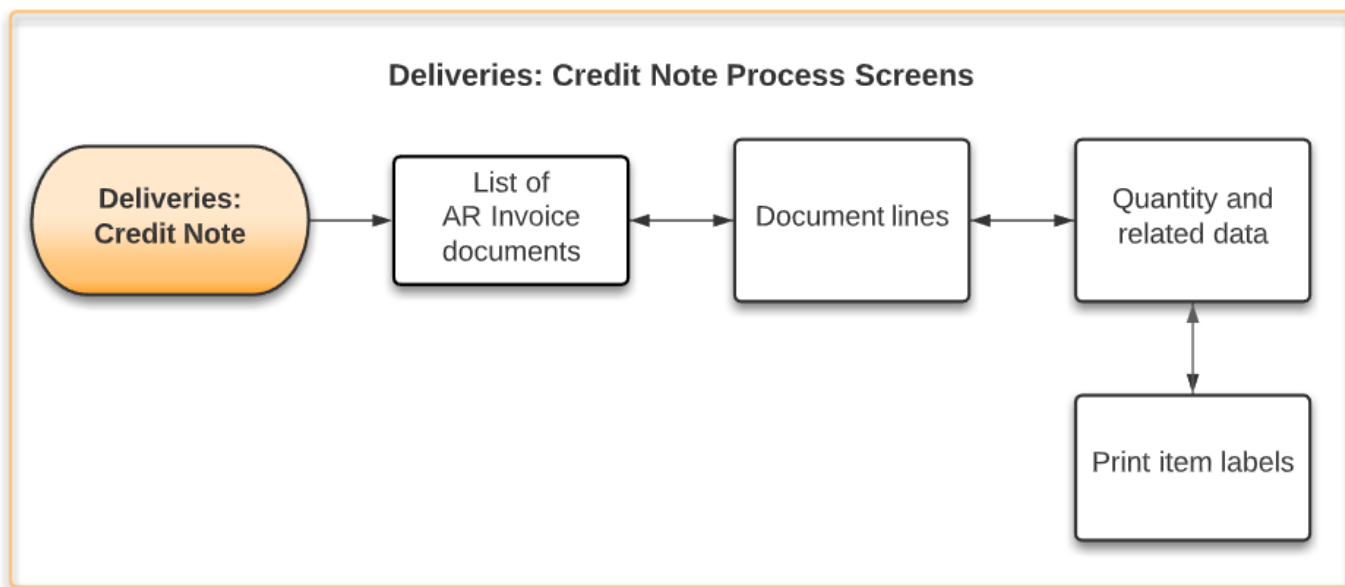
- Specify the bin location on this screen. It is possible to receive the item into multiple bin locations, but the total quantity received into the bin locations must be equal to the quantity added on the previous screen.
- If the item is managed by batches and if the Return Request is copied from the Delivery document, add the batch number, enter the quantity then press 'Add' or 'Upd.'. Only items with the same batch number as the in the delivery document can be received as a return.
- If the item is managed by batches and there is no related line, add the batch number, enter the quantity then press 'Add' or 'Upd.'. Any previous batch can be used that had been delivered to the customer.
- If the item is managed by serial numbers and if the Return Request is copied from the Delivery document, add the quantity by scanning the serial numbers. Only items with the same serial numbers as in the delivery document can be received as a return.
- If the item is managed by serial numbers and there is no related line, add the quantity by scanning the serial numbers. Any previous serial can be used that had been delivered to the customer.

<div>Sales Ret. SRR</div> <div>ItemA1000 * Normal Paper</div> <div>Original Bin01-Q</div> <div>Bin Loc.01-S</div> <div>UoMPack</div> <div>Quantity1</div> <div>AddUpd</div> <div>01-Q1 Pack</div> <div>PrintQty1 of 5 Pack</div> <div>DoneCancel</div>	<div>Sales Ret. SRR</div> <div>ItemB1000S * Batch Paper</div> <div>Original Bin01-S</div> <div>Bin Loc.01-S</div> <div>Batchbtn_20231019150826</div> <div>UoMPack</div> <div>Quantity2</div> <div>AddUpd</div> <div>01-SBatch: btn_20231011 Pack</div> <div>PrintQty1 of 3 Pack</div> <div>DoneCancel</div>	<div>Sales Ret. SRR</div> <div>ItemS1001SD * Serial Manual</div> <div>Original Bin01-Q</div> <div>Bin Loc.01-S</div> <div>Serial No.20231019150819_018</div> <div>01-SSerial No.: 20231019150819_017</div> <div>PrintDeleteQt1 of 12</div> <div>DoneCancel</div>
--	---	--

<div>Produmex Scan</div> <div><div></div><div>Batch number must be the same as in the Delivery: btn_20231019150826</div><div>OK</div></div>	<div>Produmex Scan</div> <div><div></div><div>Serial number must be the same as in the Delivery: 20231019150819_017, 20231019150819_018, 20231019150819_019, 20231019150819_020, 20231019150819_021, 20231019150819_022, 20231019150819_023, 20231019150819_024, 20231019150819_025, 20231019150819_026, 20231019150819_027, 20231019150819_028</div><div>OK</div></div>
---	--

- Tap the Print button to print the item label.
- Tap the Done button to save the entered data and to go back to the previous screen.
- Tap the Cancel button to go back without saving.
- Continue with the next item or tap the Done button to finish the receipt and to go back to the previous screen.
- To create the Return document, select the line of the delivery and tap Post.

4.8. Credit Note



The Credit Note process is similar to the Sales Return process on the mobile. The input is an A/R Invoice document and the result is an A/R Credit Memo document.

Press the 'Credit Note' icon from the Main Menu.

On the next screen enter the filters and tap the ReLoad button to list the A/R Invoice documents. The following filters can be added:

- A/R Invoice: The A/R Invoice document number
- Customer: The customer code
- Due date: The due date of the delivery
- Item: The item code of the item to return

Displayed information:

1. A/R Invoice document number
2. Customer code and description
3. Due date
4. Returned document lines/Open delivery document lines
5. Remarks

Credit Note

A/R Invoice

Customer

Due Date

Item

#9 PCO12345 * Paper Comp
Due: 04/13/18 Ret: 0 / 4
Remarks: Based On Sales Orders 56.

2 / 2 (3)

Reload

Return Cancel

Select the invoice from the list and tap the Return button to start the return.

On the next screen every open line from the invoice is listed.

Scan or select the item to receive then add the quantity and tap the Add or Upd . button. The maximum amount is limited by the invoice line quantities. If the item has UoM groups, specify the UoM group as well.

Note: Assembly BoM's are not supported.

Credit Note

A/R Invoice 9 * Paper Company

Item Filter

UoM pcs

Quantity Add Upd

#1 A1000 * Normal Paper A1 000
Open WH: 01
0 / 10 pcs

#2 B3000 * Batch Paper B3
Open WH: 01
0 / 10

#3 S1000 * S1 serialized paper
Open WH: 01
0 / 10

Done

If the warehouse has bin locations and/or the items is managed by batch or serial numbers, an additional screen is prompted.

- Specify the bin location on this screen. It is possible to receive the item into multiple bin locations, but the total quantity received into the bin locations must be equal to the quantity added on the previous screen.

- If the item is managed by batches, add the batch number, enter the quantity then press 'Add' or 'Upd.'. Only items with the same batch number as the in the Delivery document can be received as a return.
- If the item is managed by serial numbers, add the quantity by scanning the serial numbers. Only items with the same serial numbers as in the Delivery document can be received as a return.

The image displays three screenshots of the 'Credit Note' form in SAP Business One, illustrating different item management scenarios:

- First Screenshot:** Item A1000 * Normal Paper A1. Bin Loc. 01-ST-P0012 * Input location. UoM pcs. Quantity 5. Buttons: Add, Upd, Print, Done, Cancel.
- Second Screenshot:** Item B3000 * Batch Paper B3. Bin Loc. 01-ST-P0011 * Pick location. Batch BN7654. UoM. Quantity 10. Buttons: Add, Upd, Print, Done, Cancel.
- Third Screenshot:** Item S1000 * S1 serialized paper. Bin Loc. 01-ST-P0011 * Pick location. Serial No. SN39. List of serial numbers: 01-ST-P0011 Serial No.: SN36, 01-ST-P0011 Serial No.: SN37, 01-ST-P0011 Serial No.: SN38. Buttons: Print, Delete, Qt, 3 of 10, Done, Cancel.

The image displays two error messages from the 'Produmex Scan' window:

- First Error:** Batch number must be the same as in the A/R Invoice: BN7654. OK button.
- Second Error:** Serial number must be the same as in the A/R Invoice: SN36, SN37, SN38, SN39, SN40, SN41, SN42, SN43, SN44, SN45. OK button.

Tap the Print button to print the item label.

Tap the Done button to save the entered data and to go back to the previous screen.

Tap the Cancel button to go back without saving.

Continue with the next item or tap the Done button to finish the receipt and to go back to the previous screen.

To create the A/R Credit Memo document, select the line of the invoice and tap Post.

5. Stock Transfers

A transaction started in Produmex Scan must be finished in Produmex Scan. If it is finished in SAP Business One, the

allocated stock cannot be used for another transaction in Produmex Scan. For more information click [here](#).

5.1. Stock Transfer

With the stock transfer function stock can be reallocated from one warehouse/bin location to another. It is possible to move stock between bin locations in different warehouses.

First you can filter the stock to transfer according to the Warehouse/Bin Location, Item Code, Batch/Serial number. Tap the Reload button to load the filtered stock.

Select the stock to move and tap the Transfer button.



On the next screen enter the target warehouse/bin location and the quantity to transfer. It is possible to transfer stock into multiple warehouses/bin locations.

If the item is a batch item, enter the batch number and batch quantity as well. It is possible to move stock from different batches.

If the item is managed by *On every transaction* serial numbers, scan the serial numbers to transfer.

If the item is managed by *On release only* serial numbers, add the quantity to transfer. The system will automatically allocate the serial numbers to move.

Stock Transfer

ItemS1000 * Serial paper

From Bin01-RECEIVING-BIN-LOCATION

To01-ST-P0012 * Input location

Serial No.SN112912

SN: SN112911

From: 01-RECEIVING-BIN-LOCATION

To: 01-ST-P0012

Find Stocks

Delete

Trf1 of 20

Done

Cancel

Stock Transfer

ItemS2000 * Serialized paper

From Bin01-RECEIVING-BIN-LOCATION

To01-ST-P0012 * Input location

Quantity5

Add

Quantity: 2

From: 01-RECEIVING-BIN-LOCATION

To: 01-ST-P0011

Find Stocks

Delete

Trf2 of 10

Done

Cancel

To delete a line, select the line and tap the Delete button.

Tap the Find Stocks button to see the list of available stocks for the item. For more information see [Query Stocks](#).

Tap the Done button to finish. On the next screen add the next item to move or tap the Post button to transfer the stock and to create the stock transfer document in SAP BO.

5.2. Stock Transfer Request

With this function you can handle stock transfer request documents. First you have to create the documents in SAP BO and then you can load them on the mobile device. You can filter them according to Request Number, Warehouse from and Warehouse to. If you tap Reload, the existing requests will be loaded into the grid.



Here you can select the stock transfer request that you want to process and tap Transfer. On the next screen you can see a list of the items that are on the request.



Scan or select an item to transfer, then enter the quantity and tap Add or Upd.

If the source and/or destination warehouse has bin locations or the item is managed by batches or serial numbers, add the bin location/batch/serial numbers on the next screen. It is possible to transfer stocks from different bin locations.

- If the source warehouse has bin locations, add the source bin location to the 'From Bin' field. If the target warehouse has bin locations, add the target bin location to the 'To Bin' field. It is possible to transfer stocks into different bin locations.
- If the item is managed by batches, enter the batch number as well. It is possible to transfer stock with different batches.
- If the item is managed by 'On every transaction' serial numbers, add the quantity by scanning the serial numbers.
- If the item is managed by 'On release only' serial numbers, add the quantity to transfer. The system will automatically allocate the serial numbers to move.

The total quantity must be equal to the quantity entered on the previous screen. Tap the Find Stocks button to check the existing stocks.

If you tap Done, you will get back to the previous screen and your entered data will be taken over to there. If you tap Cancel, your changes will be lost, and you get back to the previous screen.

Here if you tap Post, the stock transfer document will be created in SAP BO based on the stock transfer request document. If you tap Cancel, you will get back to the main menu without creating the stock transfer. You can come back any time, load your request and continue working on it.

5.3. Mass Transfer

This function allows you to move all stocks from one bin location to another (or one warehouse to another, if the warehouse is non-bin location warehouse).

First you must input the WH / Bin From, after leaving this field you will see all the current stocks on that location in the list. There is no option to select only partial quantities. Next the WH / Bin To field must be entered, and after tapping Transfer, a Stock Transfer document is created in SAP Business One.

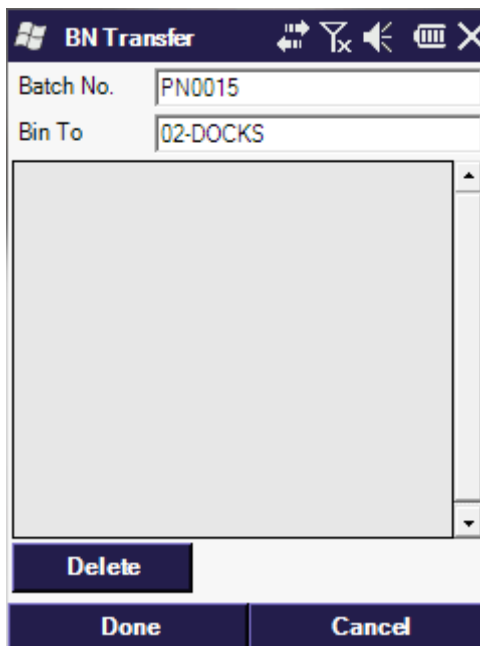


5.4. BN Transfer

With the BN Transfer function stock can be moved based on a batch number.

Note: Only sales items can be moved with the BN Transfer function.

Scan the destination bin location and the first batch to move.



Stock with the scanned batch number will be listed on the screen. Different items and stocks stored in different bin locations are listed on separate lines.

To remove a product from the list, select its line and tap the Delete button.

Displayed information:

1. Bin location
2. Item code*Item name
3. Batch number
4. Quantity on stock



Tap the Done button to transfer the stock. A Stock Transfer document is created in SAP Business One.

5.5. BN SO Transfer

With the BN SO Transfer function stock can be moved based on the sales order and the batch number. During the process the base sales order can be modified.

Select the sales order from the list. Every sales order that contains at least one open line with an allocated batch will be listed.

Note: The BN SO Transfer function is only meaningful for sales orders created from the BN Create SO function. It is not advised to move stock with this function based on a sales order not created with the BN Create SO function.

It is possible to filter the sales orders with the following:

- Doc. No.
- Customer

- Due Date
- Item

Tap the Reload button to apply the filter.

Select the sales order and tap the Transfer button to transfer the items.

Batch SO Transfer

Doc. No.

Customer

Due Date

Item

SO #13 C00002 * Customer 02

Due: 05/17/17 Trfd: 0 / 3

Remarks:

Reload

Transfer Cancel

Scan the destination bin location then scan the first batch.

Stock with the scanned batch number will be listed on the screen. Different items and stocks stored in different bin locations are listed on separate lines.

Scan the batch number to pick the items.

It is possible to scan a batch number not allocated for the sales order. In this case the stock with the scanned batch number will be added to the sales order.

Information displayed on the screen:

1. Document line number
2. Item code*Item name
3. Bin location
4. Batch number
5. Picked quantity
6. Picked quantity/Ordered quantity



Tap the Find Stocks button to open the Stock Info screen. On this screen the warehouse, the item code and the batch number is displayed. Tap the Ser./Bat. button to see the batch number. Tap the Print button to print the item label. For more information about printing see [Print labels](#).

Stock Info		Query Stocks	
WH / Bin	02	Item	PN25100-G1
Item	PN25100-G1 * Pine 25x100 G1	Bin Loc.	02-SYSTEM-BIN-LOCATION
BN/SN	PN0001		
PN25100-G1 * Pine 25x100 G1 02-SYSTEM-BIN-LOC 5		PN0001 5	
<div>Print Ser./Bat. Tot 5</div>		<div>Print Total Quantity 5</div>	
<div>Reload Back</div>		<div>Reload Back</div>	

Tap the Details button to see the details of the selected stock. The Batch Details screen opens.

Batch Details	
Sales Order	13 * Customer 02
Batch No.	PN0001
02-SYSTEM-BIN-LO PN25100-G1 * Pin Batch: PN0001 5	
<div>Delete</div>	
<div>Done Cancel</div>	

Tap the Delete button to unpick the selected stock.

- If the stock line is from the original sales order, the stock line will remain on the screen and the picked quantity will be set to zero.
- If the stock line is added by scanning a batch, it will be removed from the screen and will not be added to the sales order.

The screenshot displays the 'Batch SO Transfer' application window. It features a header bar with a title and several icons. Below the header, there are four input fields: 'Doc. No.', 'Customer', 'Due Date', and 'Item'. The 'Customer' and 'Item' fields have dropdown arrows. Below the input fields is a list view showing a single entry: 'SO #13', 'C00002 * Customer 02', 'Due: 05/17/17', and 'Trfd: 3 / 3'. Below the list view is a large empty text area labeled 'Remarks:'. At the bottom of the screen are four buttons: 'Reload', 'Post', 'Transfer', and 'Cancel'.

Scan the next batch number or tap the Done button to finish the picking. The system will return to the list of sales orders. In order to transfer the picked stock, select the sales order and tap the Post button. A Stock Transfer document is created in SAP Business One.

6. Recommendations

6.1. Overview

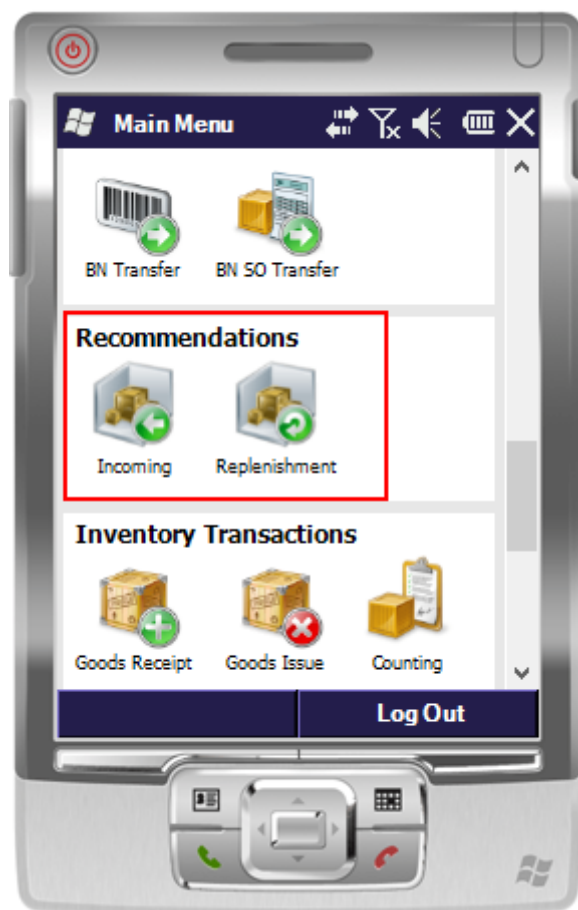
Produmex Scan supports automatic strategies, which are recommendations to perform stock movements.

- Incoming strategy: When new goods arrive, the truck is unloaded into a specific bin location and then the automatic recommendations inform the warehouse workers where to move the unloaded goods.
- Replenishment strategy: Replenishment recommendations can be used to make sure that the frequently used, easily reachable bin locations always have enough stock, and if not, stock movements are recommended.

Recommendations:

The server module of Produmex Scan creates the recommendations as Stock Transfer Draft documents, which can be processed on the mobile device and then Stock Transfer documents are created.

The recommendations are available in the main menu:



For information on configuration and customization see [Strategies in ProDumex Scan](#).

6.2. Stock Transfer Draft documents

On the Recommendations screens, you can see all the Stock Transfer Draft documents where the Transaction Type user-defined field is *Incoming*. It is possible to filter by *From Warehouse* or *To Warehouse*.

After selecting the appropriate document, tap the Transfer button to start working on the stock transfer.



On the next screen the < and > signs indicate that the locations are the recommended ones configured in the draft document and the locations must be re-scanned during the process.

The value of From Bin is already selected and when you scan the location, the recommended text is replaced with the scanned location.



7. Inventory Transactions

This documentation describes the Goods Receipt and the Goods Issue options of Produmex Scan. For information on stock counting click [here](#).

7.1. Goods Receipt



Select the Goods Receipt option on the Main Menu under the Inventory Transactions section. On the next screen create a new Goods Receipt document or proceed with an already started one.

- To start a new Goods Receipt, add the Doc. Date and tap the New button. To add a remark, enter the text to the Remarks field.
- To proceed with a started preliminary document, tap the Reload button to load the already started orders. Select the document and tap on the Resume button.
- To create the Goods Receipt, select the preliminary order and tap the Post button.



On the Goods Receipt (list) screen add the warehouse to the Warehouse field. By default the

warehouse is empty or it is the last warehouse in the same document. Scan the item or enter the item code to the Item field. Enter the quantity and tap the Add or Upd. button to add the item.

If there are multiple UoMs for the item, you can select a different UoM than the default. Default: inventory/base UoM.

On the grid already added items are listed.

If the warehouse has bin locations, and/or the item is managed by batches/serial numbers, the system proceeds to a screen where the bin location, batch and serial numbers can be added.

- If the warehouse has bin locations, add the bin location. It is possible to receive the stock into multiple bin locations.
- If the item is a batch item, add the batch number. It is possible to receive multiple batches.
- If the item is managed by 'On every transaction' serial numbers, scan the serial numbers. To remove a serial number, select the serial number and tap the Delete button.
- If the item is managed by 'On release only' serial numbers, enter the quantity. The system automatically creates empty (placeholder) serial number records.

The image displays three screenshots of the 'Goods Receipt' application interface, each showing a different item type and its associated data entry fields.

- Left Screenshot:** Item: B1001SD * Batch Paper. Bin Loc.: 02-DOCKS. Batch: BN0523. UoM: Carton. Quantity: 15. The 'Add' button is highlighted. Below the input fields, a list shows '02-DOCKS Batch: BN0001 15 Carton'.
- Middle Screenshot:** Item: S1000S * Serial Paper. Bin Loc.: 02-DOCKS. Serial No.: SN12345. The 'New' button is highlighted. Below the input fields, a list shows '02-DOCKS Serial No.: SN12345'.
- Right Screenshot:** Item: S2000 * Serialized paper. Bin Loc.: 01-ST-P0011 * Pick location. Quantity: 3. The 'Add' button is highlighted. Below the input fields, a list shows '01-RECEIVING-BIN-LOCATION Quantity: 2'.

Each screenshot includes a 'Print' button and a 'Qty' field indicating the current record number (e.g., '15 of 25 Carton', '1 of 10', '2 of 5').

The total quantity must be equal to the quantity entered on the previous screen in order to proceed.

Tap the Print button to print the item label.

Tap the Done button to proceed. The system goes back to the previous screen and saves the entered data.

Tap the Cancel button to go back without saving the data.

*Price/Account: a user query has to be defined with the name *bx_mobile_wh9_goodsreceipt_pricing*.

Parameters	Result
[%1] Employee ID	Price (BXITPRC)
[%2] Warehouse	Currency (BXITCURR)
[%3] ItemCode	Account number (BXITACCN)
	Distribution Rule (BXITDSTR)

Example query:

```
SELECT OITM.AVGPrice as BXITPRC. '$' as BXITCURR FROM OITM WHERE  
ItemCode=[%3]
```

7.2. Goods Issue



Select the Goods Issue option on the Main Menu under the Inventory Transactions section.

On the next screen create a new Goods Issue document or proceed with a started one.

- To start a new Goods Issue, add the Doc. Date and tap the New button. To add a remark, enter the text to the Remarks field.
- To proceed with a started preliminary document, tap the ReLoad button to load the already started orders. Select the document and tap the Resume button.
- To create the Goods Receipt, select the preliminary order and tap the Post button.



On the Goods Issue (list) screen add the warehouse to the Warehouse field. By default the warehouse is empty or it is the last warehouse in the same document. Scan the item or enter the item code to the Item field. Only inventory items can be scanned or selected. Enter the quantity and press the Add or Upd. button to add the item.

If there are multiple UoMs for the item, you can select a different UoM than the default. Default: inventory/base UoM.

On the grid already added items are listed.

If the warehouse has bin locations, and/or the item is managed by batches/serial numbers, the system proceeds to a screen where the bin location, batch and serial numbers can be added.

- If the warehouse has bin locations, add the bin location. It is possible to receive the stock into multiple bin locations.
- If the item is a batch item, add the batch number. It is possible to receive multiple batches.
- If the item is managed by 'On every transaction' or 'On release only' serial numbers, scan the serial numbers. To remove a serial number, select the serial number and tap the Delete button.

The total quantity must be equal to the quantity entered on the previous screen in order to proceed.

Tap the Print button to print the item label.

Tap the Done button to proceed. The system goes back to the previous screen and saves the entered data.

Tap the Cancel button to go back without saving the data.

Price/Account: a user query has to be defined with the name *bx_mobile_wh9_goodsissue_pricing*.

Parameters	Result
[%1] Employee ID	Price (BXITPRC)
[%2] Warehouse	Currency (BXITCURR)
[%3] ItemCode	Account number (BXITACCN)
	Distribution Rule (BXITDSTR)

Example query:

```
SELECT
  "OITM"."AVGPrice" as "BXITPRC",
  '$' as "BXITCURR",
  (select "AcctCode" from "OACT" where "FormatCode" =
replace('11100000-01-001-01', '-', ' ')) as "BXITACCN"
FROM
  "OITM" WHERE "ItemCode" = [%3]
```

9. Other

9.1. Query Stocks

You can get stock information with the function Query Stocks. You can filter according to the following:

- Warehouse or Bin location
- Item code *Please note: No result will be returned for non-inventory items.*
- Batch/Serial Number

After setting the filters tap ReLoad and the grid will be populated with the stock data found based on the criteria.

Important Note!

The Tot. field shows the total quantity of the queried stock data, not just the sum of the query result records.

However, **if you modify the Maximum number of lines for stock queries to**

display (more than 100 may cause performance issues) setting in the **Scan General Tab**, then the **Tot. field** will **ONLY** summarize the stock quantities of the displayed stock lines.

Maximum number of lines for stock queries to display (more than 100 may cause performance issues)	Defines the maximum number of lines displayed in the Query Stocks/Stock Info screens. Note: This setting is ONLY relevant if YOU ARE NOT USING customized query: bx_mobile_wh9_querystocks_query_custom. Otherwise, the number of records will be returned based on that query.
---	---

The image shows two screenshots of the 'Query Stocks' application interface.

Left Screenshot: The 'Query Stocks' screen displays a list of stock lines. The fields are: WH / Bin (01), Item (B1000 * B1 batch paper), BN/SN, and UoM. The list shows:

- B1000 * B1 batch paper 01-RECEIVING-BIN-L 10
- B1000 * B1 batch paper 01-ST-P0011 10
- B1000 * B1 batch paper 01-ST-P0012 5
- B1000 * B1 batch paper 01-SYSTEM-BIN-LOC 42

 At the bottom, there are buttons for 'Print', 'Ser./Bat.', 'Tot.' (67), 'Reload', and 'Back'.

Right Screenshot: The 'Query Stocks' screen displays a detailed view of a selected stock line. The fields are: Item (B1000), Bin Loc. (01-ST-P0011), and a list of serial/batch numbers:

- BN89712 5
- BN89655 5

 At the bottom, there are buttons for 'Print', 'Total Quantity' (10), 'Reload', and 'Back'.

With **Print** you can print the stock labels for the selected items.

If the item on the selected line is managed by serials or batches, an additional **Ser./Bat.** button is displayed. Tap this button to see the list of the serial/batch numbers belonging to the selected line. To print the label for a serial/batch, select its line and tap the **Print** button.

Tap **ReLoad** to refresh the data.

Tap **Back** to go back to the query stock filter form.

The query stocks function can be reached from other functions by tapping the **Find stocks** button. When reaching **Stock Info** from another function, the filter fields are prefilled and non-editable. Instead of the **ReLoad** button, a **Select** button is displayed. Tap this button to add the stock on the selected line and to go back to the previous screen.

Stock Info

WH / Bin01

ItemB1000 * B1 batch paper

BN/SN

B1000 * B1 batch paper
01-RECEIVING-BIN-L 10

B1000 * B1 batch paper
01-ST-P0011 10

B1000 * B1 batch paper
01-ST-P0012 5

B1000 * B1 batch paper
01-SYSTEM-BIN-LOC 42

Print

Ser./Bat.

Tot67

Select

Back

Query Stocks

ItemB1000

Bin Loc.01-ST-P0011

BN897125

BN896555

Print

Total Quantity10

Select

Back

9.2. Print labels

With this function you can print labels for the bin locations. You can enter the bin code for which you want to print the labels, the number of labels you want to print in the Labels field, and select the printer (the default printer will be prefilled):



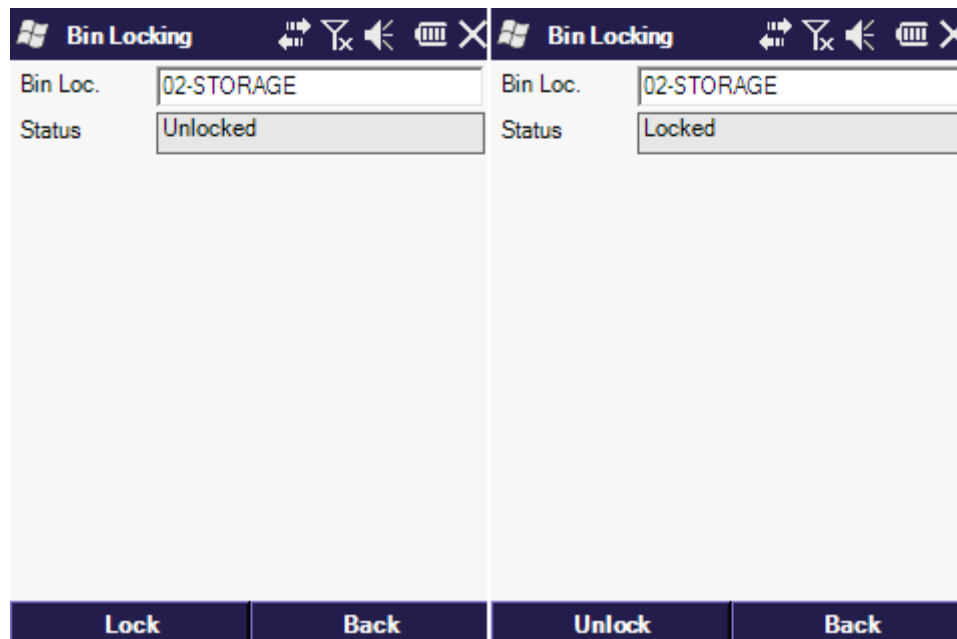
Tap Print to print the labels, tap Back to go back to the main menu. You can choose the printer to print by tapping ... beside the Printer field.

Select the printer you want to use and tap Choose to use it or tap Cancel to close the printer selection screen without changing the assigned printer.

9.3. Bin Locking

To lock a storage location, tap the Bin Locking button.

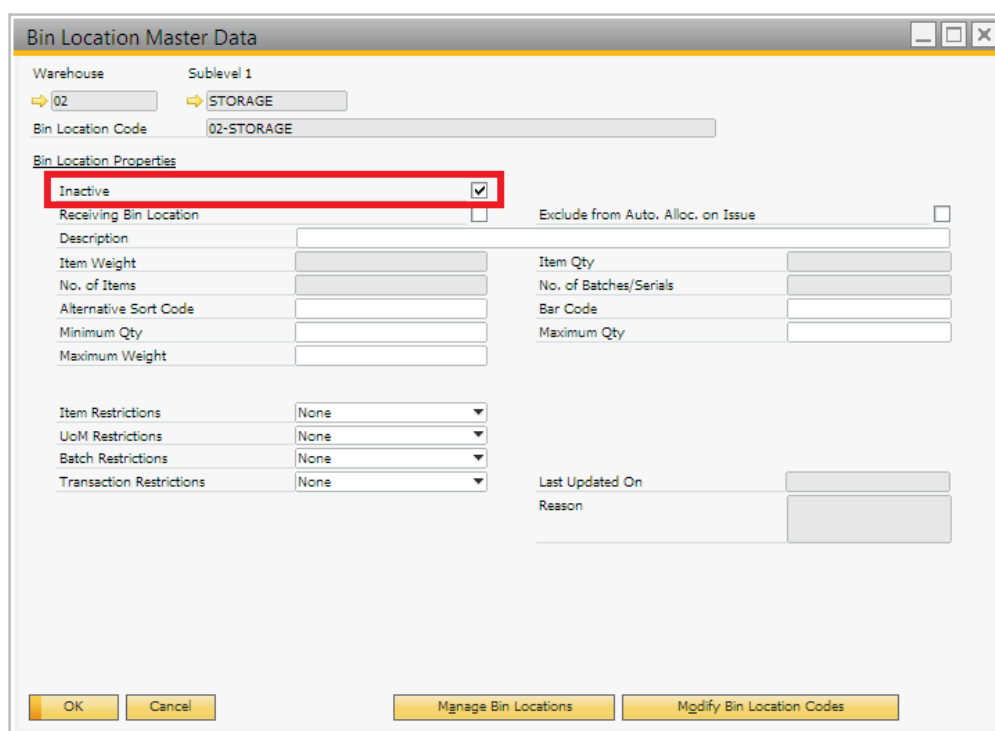
On the next screen add the bin location code. The *Status* of the location will be automatically populated.



Tap the **Un**lock button to unlock the bin location.

Tap the **Lock** button to lock the bin location. A bin location cannot be locked if there are open inventory counting documents or the bin location contains positive/negative inventory.

The locked bin locations will be marked as Inactive on the Bin Location Master Data.



9.4. Bin Attributes

Use this function to check and modify the attributes of a bin. *Please note: Customization is required in order to use this function.*

9.4.1. Customization

Add custom fields

By default only the Bin Loc. field is displayed on the screen. In order to display bin attributes, add definition lines for them in the [Customization Fields user table](#).

- To add a Bin Location Master Data standard field, add the DI API field name with the “BO_” prefix. Use the SAP B1 SDK help file to find out the possible fields.
- To add a Bin Location Master Data user defined field, add the field title with the *BO_U_* prefix.

Example:

In the example we will add the standard Description field and a Customer user field.

We add the following entries to the Customization Fields user table:

Field Name	Field Type	Label	Module	Screen	Read Only
BO_Description	String	Description	BXMobileWH9	BinAttributesScreen	No
BO_U_PMXCUS	String	Customer	BXMobileWH9	BinAttributesScreen	No

Add a custom query

Add the following query to automatically populate the custom fields with the current values after the bin location is scanned.

Query name: *BXMobileWH9_BinAttributesScreen_TextBinLocation_validate_after*

Example:

```
IF(LEN($[BO_Description]) < 1 AND LEN($[BO_U_PMXCUS]) < 1)
SELECT Descr AS BO_Description, U_PMXCUS AS BO_U_PMXCUS
FROM OBIN WHERE BinCode = $[TextBinLocation]
```

9.4.2. Using the Bin Attributes function

Scan the bin location. The custom fields will be automatically populated with their current value.

Enter a new value.

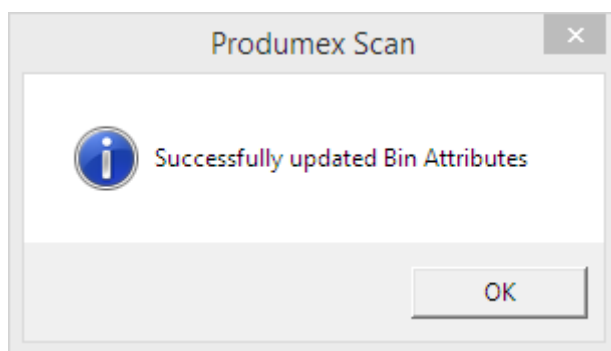
Bin Attributes	
Bin Loc.	
Description	
Customer	
<div>Update Back</div>	

Bin Attributes	
Bin Loc.	01-ST-P0013
Description	Empty
Customer	Not assigned
<div>Update Back</div>	

Bin Attributes	
Bin Loc.	01-ST-P0013
Description	Pick loc AA123
Customer	MSLLC
<div>Update Back</div>	

Tap the Update button.

The following message is displayed:



In SAP Business One, the master data of the given bin location is updated with the entered values.



General Client Behavior

1. Scanning a barcode used for multiple items

With Produmex Scan it is possible to scan a barcode used for multiple items on the following screens:

- Create Delivery Lines screen
- Create Goods Receipt PO Lines screen
- Goods Issue Lines screen
- Goods Receipt Lines screen
- Goods Receipt PO Lines screen
- Inventory Counting Quantities screen
- Issue for Production Lines screen

- Quick Inventory Counting Quantities screen
- Return Components Lines screen
- Sales Issue Lines screen
- Sales Return Lines screen
- Transfer Stock Request Line screen
- Transfer Stocks screen

When a barcode used for multiple items is scanned, Produmex Scan lists all the items that have the scanned barcode on the *Item Selection* screen.

After selecting the necessary item, tap the Choose button and the system navigates back to the previous screen.

Example: Scanning a barcode used for multiple items on the *Goods Receipt PO* screen



Note: If Produmex WMS and Produmex Scan are installed on the same company database, Produmex Scan cannot use the same barcode for multiple items as Produmex WMS does not support it.

Administrative Functions

When you create bookings in the mobile devices, mobile transaction data are generated in the SAP BO company database to store your data before taping Post. It is also possible to check these mobile transactions in Produmex Scan and you can also cancel or book them from SAP BO.

You can find the mobile transaction administration via Inventory > Inventory Transactions > Mobile Transactions with the options Search Mobile Transactions and Mobile Transactions.

- With the Search Mobile Transactions option, you can directly open a mobile transaction or filter on the list of mobile transactions.
- With the Mobile Transactions option, you can browse the existing transactions.

Note: The transactions of the picking process are not listed.

1. Search Mobile Transactions

When you start the menu, you get a filter window which you can fill in with the necessary data.

You can filter according to every master data that you can enter at a mobile transaction in the mobile device, and you can select among four statuses: Include Under Preparation, Include Pending, Include Processed and Include Cancelled.

- Include Under Preparation means that you want to see the mobile transaction data of the employee whose creation has been already started, but the booking has not been posted.
- Include Pending is for the mobile transaction data when the employee has tried to post the booking, but the SAP BO document could not be created. In this case you can check the cause and solve it, then process the mobile transaction data again, or you can cancel the mobile transaction data and book the transaction manually in SAP BO.
- Include Processed lists all the mobile transaction data that are already processed (the SAP BO document has already been created).
- Include Cancelled shows you the mobile transaction data that have been cancelled.

After filling out the form with the relevant data, click Update and the relevant mobile transaction data is listed. In the list of Mobile Transactions window, you can choose the mobile transaction data, double-click the line and the mobile transaction window is opened.

List of Mobile Transactions

Find

Code	Transaction Status	Line Count	Posting Date	Doc Type	Base Doc Type	Originator System
00000052	UnderPreparation	2	05/05/17	Goods Receipt	None	BX Mobile WH9
00000063	UnderPreparation	2	05/05/17	Goods Issue	None	BX Mobile WH9
00000073	UnderPreparation	1	05/05/17	Return From Production	Production Orders	BX Mobile WH9
00000086	UnderPreparation	1	05/05/17	Receipt From Production	Production Orders	BX Mobile WH9

Choose

Cancel

2. Mobile Transactions

With the Mobile Transactions option, you can browse the mobile transaction data with the arrow keys and you can cancel or process from the right click context menu.

If you right click an empty area, you can choose Process or Cancel from the context menu. If you choose Process, the add-on tries to create the relevant SBO documents again. If you choose Cancel, the mobile transaction data is cancelled and you have to create the SBO documents manually based on the mobile transaction data. Alternatively, you can generate the document again from the mobile device.

[illegible]

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.

The image displays two side-by-side screenshots of the GRPO (Goods Receipt/Pick Order) software interface. The left window is titled 'S1000 * Serial paper' and shows 'Bin Loc.' as '1-RECEIVING-BIN-LOCATION' and 'Serial No.' as 'SN112918'. A red rectangle highlights the 'Serial No.' field and the 'New' button. Below this, a list of serial numbers is shown, all starting with '01-RECEIVING-BIN-LOCATION'. The right window is titled 'S2000 * Serialized paper' and shows 'Bin Loc.' as '01-ST-P0011 * Pick location' and 'Quantity' as '5'. Both windows have 'Print', 'Delete', 'Update', and 'Cancel' buttons at the bottom.

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.

Stock Transfer	
Item	S1000 * Serial paper
From Bin	01-RECEIVING-BIN-LOCATION
To	01-ST-P0012 * Input location
Serial No.	SN112912
SN: SN112911 From: 01-RECEIVING-BIN-LOCATION To: 01-ST-P0012	
Find Stocks	Delete Trf 1 of 20
Done	Cancel

Stock Transfer	
Item	S2000 * Serialized paper
From Bin	01-RECEIVING-BIN-LOCATION
To	01-ST-P0012 * Input location
Quantity	5 Add
Quantity: 2 From: 01-RECEIVING-BIN-LOCATION To: 01-ST-P0011	
Find Stocks	Delete Trf 2 of 10
Done	Cancel

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