Produmex Scan Functional Guide

This document describes the functionality of Produmex Scan. Produmex Scan is a mobile application for SAP Business One 9 to manage stock transactions.
The architecture of the solution supports even dozens of warehouse workers to perform tens of thousands of inventory transactions in conjunction with the company warehouse database. All major SAP Business One 9 inventory transactions are supported including pick-lists, stock counting, bin locations, serial/batch numbers as well as deliveries and goods receipts.
The client component is a native Windows CE/Mobile application for ultimate speed, while the server component is a scalable, robust, high performing business logic transaction engine.

It is worthwhile to understand the structure of the system first, so the workflow of each function can be seen in context.
The mobile devices require a constant connection to the system. This communication is facilitated by the Service Broker. Each mobile device's data is saved to a temporal database. This makes it possible to use multiple devices 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 also makes sure, that if the mobile device's connection is lost (network error, low battery, etc.) the work done so far is not lost.
The user can review all the changes before committing to the SAP Company Database. We call the procedure when changes are made to the company database Posting. This step suits the typical workflow of company's well, the employee in charge of the operation can verify the results at the end.

When you use the Produmex Scan application and you prepare your inventory data to create SBO documents from it, this data will be sent to the Service Broker each time you tap the Done button (so practically for each material line). The Service Broker will save this data in a so called mobile transaction. This mobile transaction data will contain all necessary information to create the appropriate booking, and when you tap the trigger button to create the document (usually the Post button), this mobile transaction will be processed and the relevant SBO document will be created with DI API based on the data.
This logic ensures that if you already created a long list of transactions and you have a failure for example in the network connection to the mobile device, you won't have to start the whole process again. In the Produmex Scan Add-on there are functions to handle those mobile transaction data. You will find more information on that at the end of the document.

Note, that while no posting is made, the changes can not be seen from the SAP BO Client.

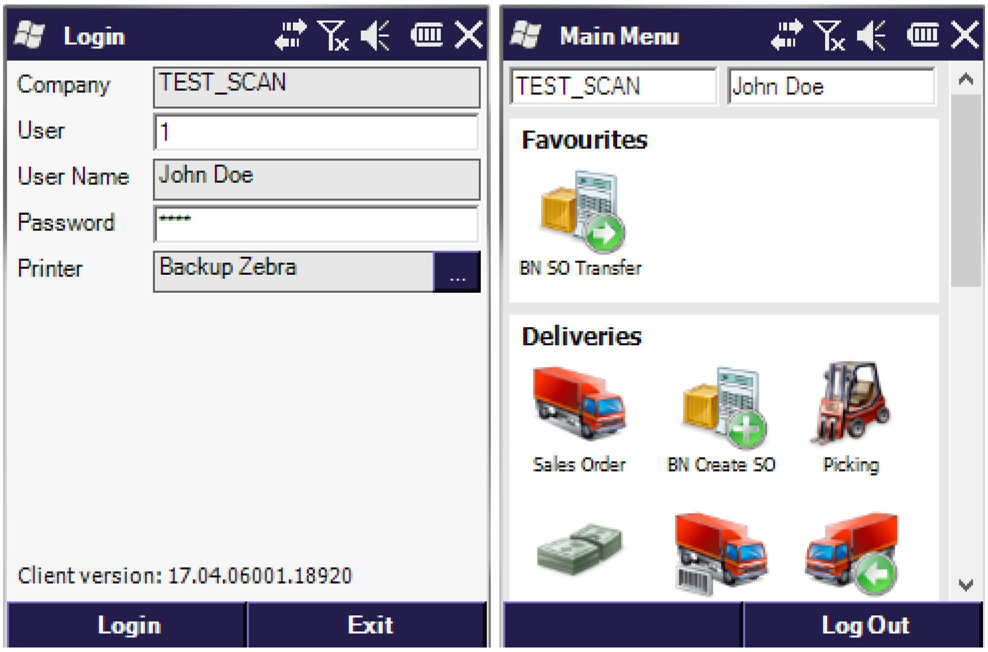
Prerequisites
Before using the Produmex Scan application, you should have set up correctly the necessary master data (employees, printers, authorizations, settings, etc.) Please refer to the Produmex Scan Installation and Configuration Guide for instructions regarding setup and configuration.

1. Logging in

After the set up if you start the mobile application, the login screen will appear.

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

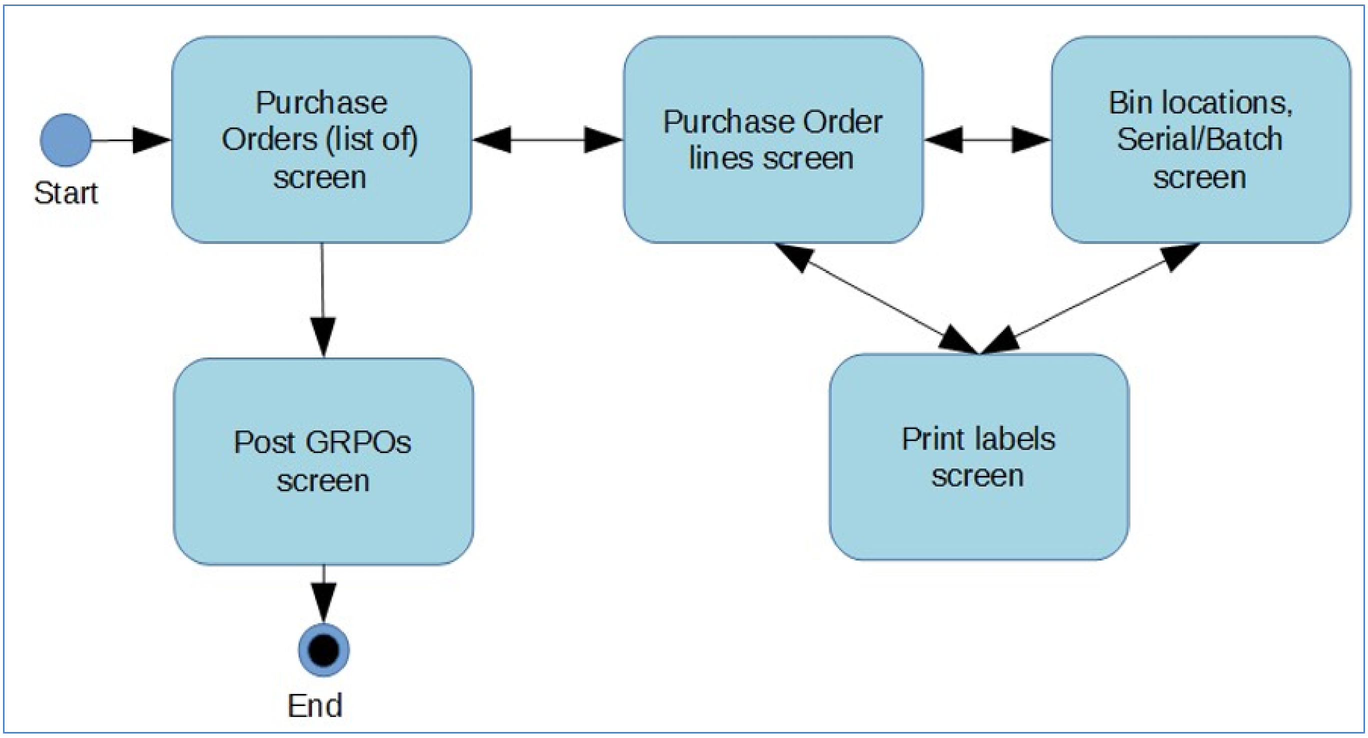
The user can also select a printer to work with by clicking on the … button beside the Printer field. Tapping Exit will close the mobile application. Tapping Login the user will be navigated to the main menu or his last active screen.



The user will see all the menu entries for which he has rights (the rights can be set in the employee master data). Note, that the user will always see the Query Stocks and Print Labels menu. By tapping the entries in the Main Menu the user can begin the indicated processes. Each process will be explained in the following sections.

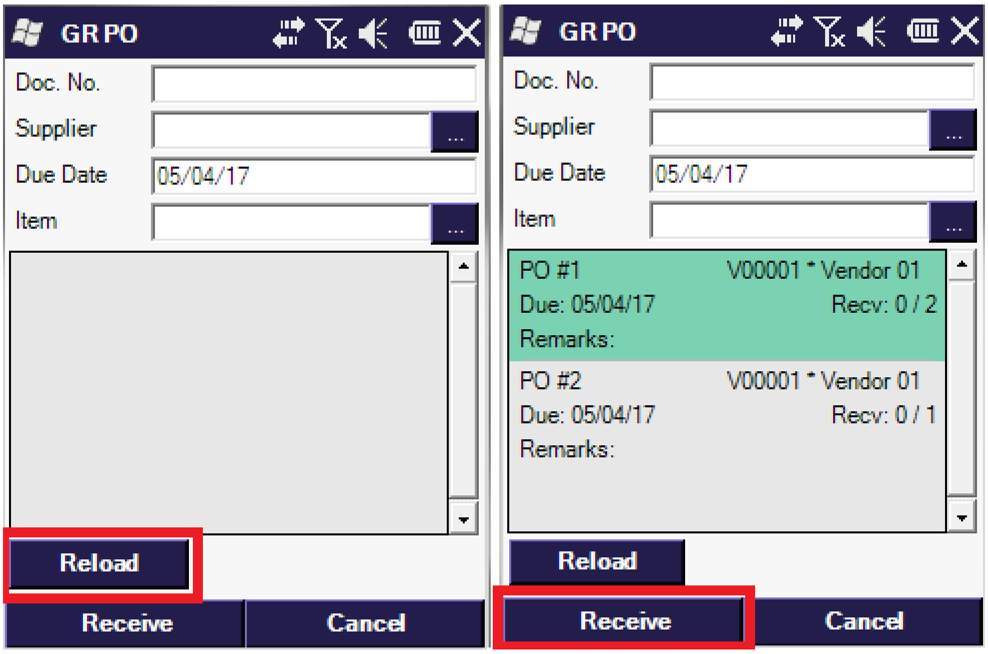
2. Goods Receipt PO

2.1. GRPO



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 then 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.

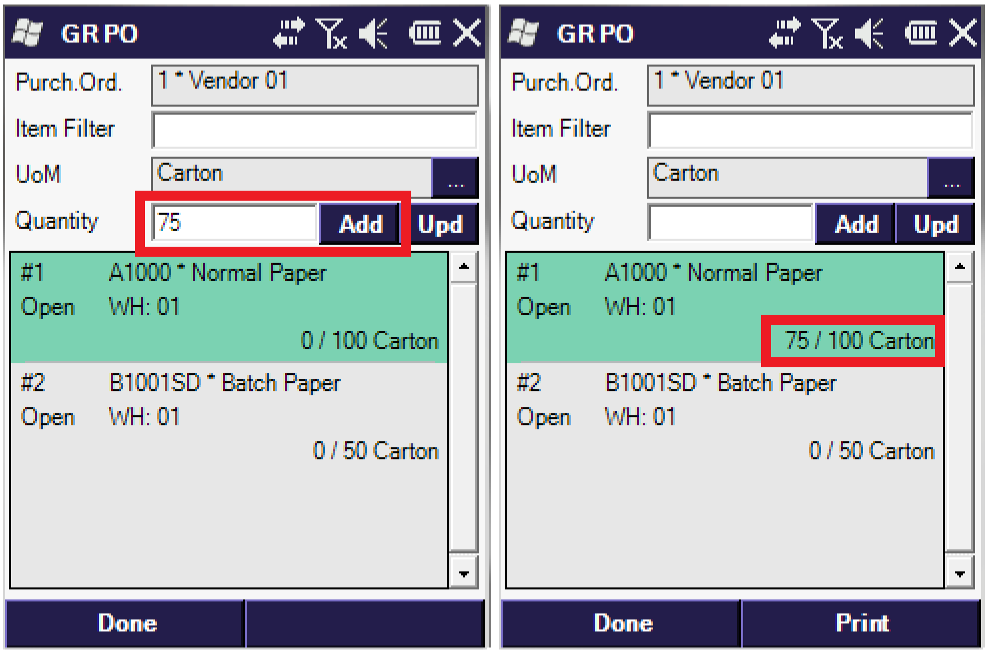


In one entry the user can see the document number of the purchase order, the name and description of the supplier, the due date and the already received full purchase order lines/all lines. In this example two orders were filtered, both have zero lines already filled out.
If the user taps Cancel, he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

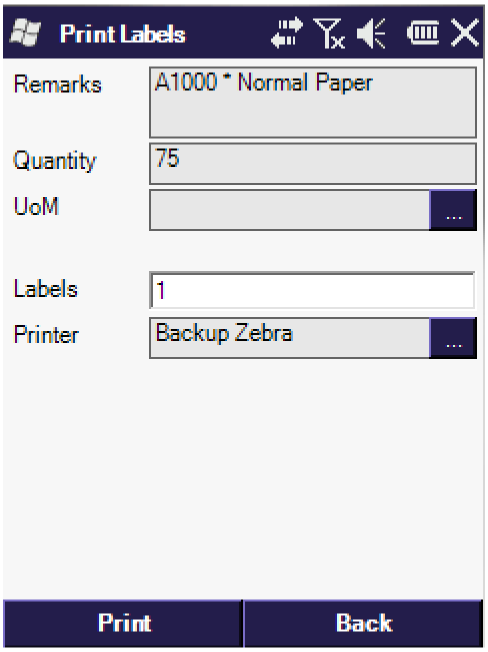
2.1.2. Receiving Items

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.



2.1.3. Printnig 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. For now, press Back to return to the GR PO screen.



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

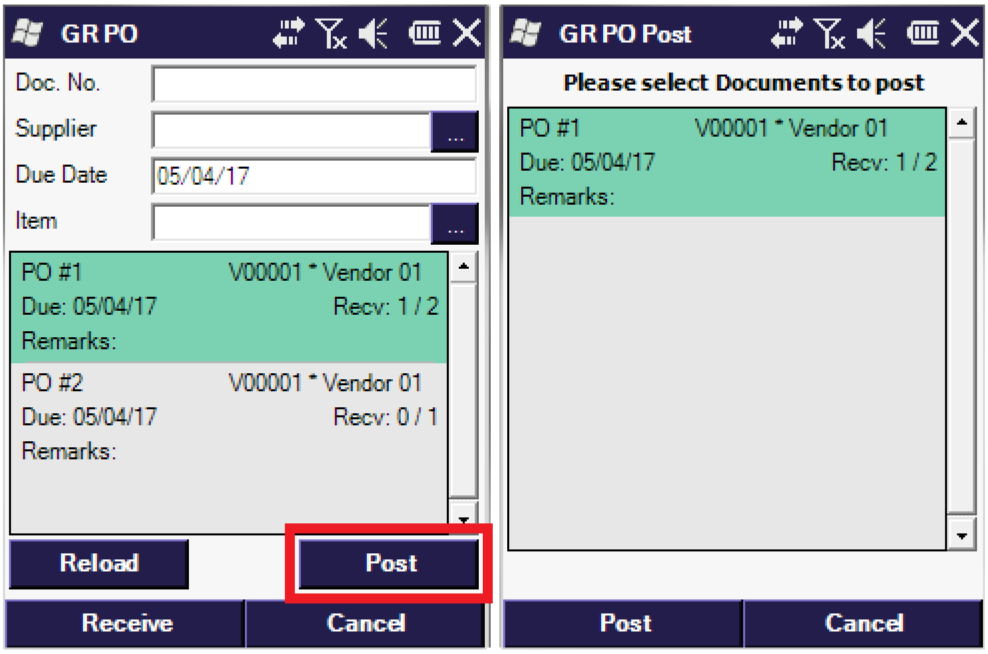
2.1.4. Posting the Goods Receipt PO

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.



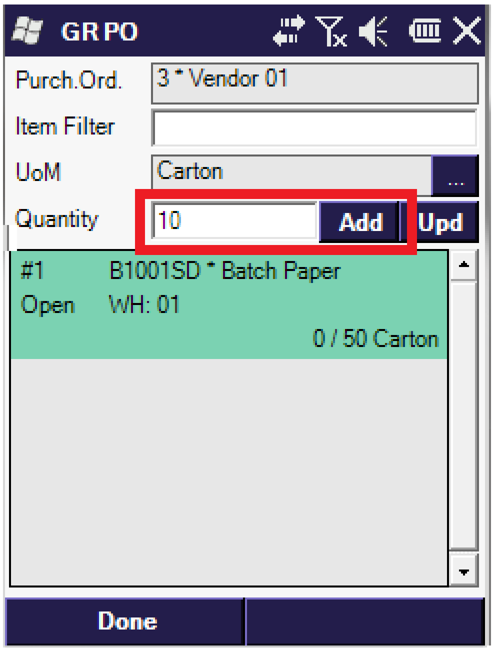
2.1.5. Dealing with Batched or Serialized Items and Bin Locations

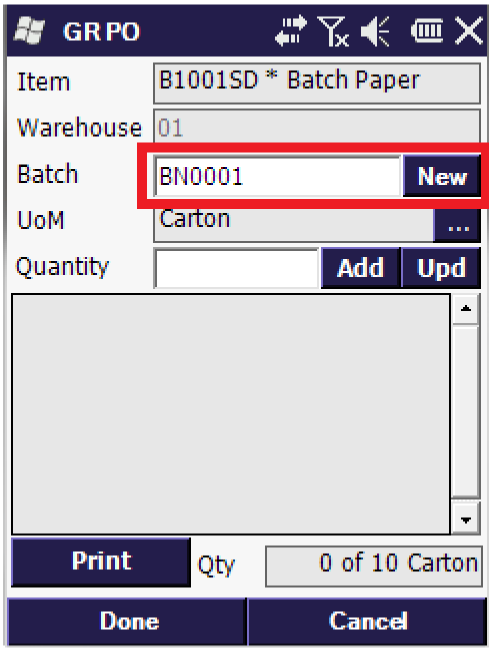
As mentioned before, after for example adding the quantity of an item in the goods receipt PO there may be extra steps involved. If the warehouse uses bin locations or the item is a batched or serialized item the user will be prompted the bin location and batch / serial selection form.

In the following example ten cartons of 'B1001SD' papers will be added to warehouse '01'. This item is tracked by batches (see Item Master Data / General / Manage Items by) and the warehouse uses bin locations (see Inventory / Inventory Reports / Bin Location List).
In this case the bin location and batch / serial selection form will be prompted.

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.

Next, if it is a batch/serial item, the user can enter the batch/serial numbers. Alternatively the user can tap the New button to automatically generate batch/serial numbers. In this example a batch item is used, the serial item works with similar logic. Note, that a company specific User Query is needed for the generation feature to function. See the Customization Examples for instructions. Next unit of measure (UoM) can be specified.



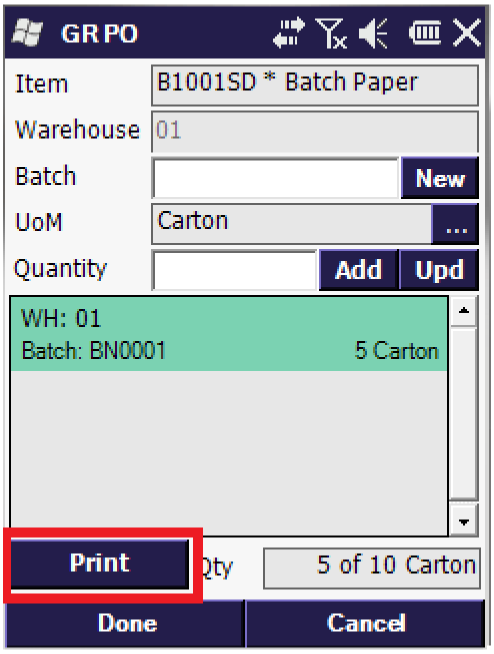


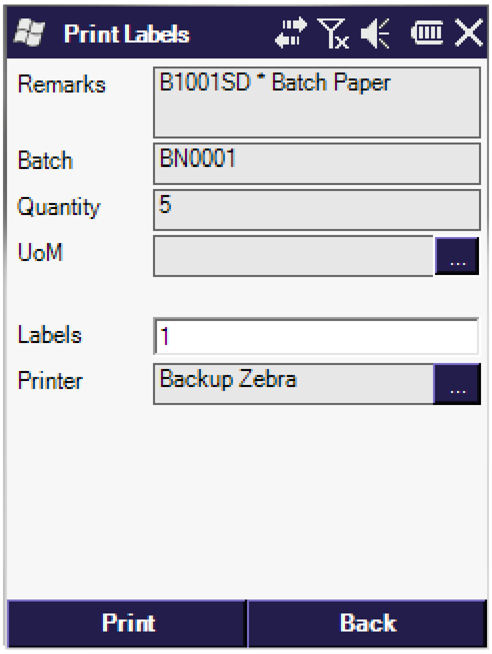
Next the user can divide the stock among the bin locations. The functionality of the Add and Upd buttons are the same as before. In this example five cartons were added as one batch.

If the user taps on the Print button, the labels for the newly received items can be printed with the already introduced printing form. Tap Back to return to the bin location and batch / serial selection form.

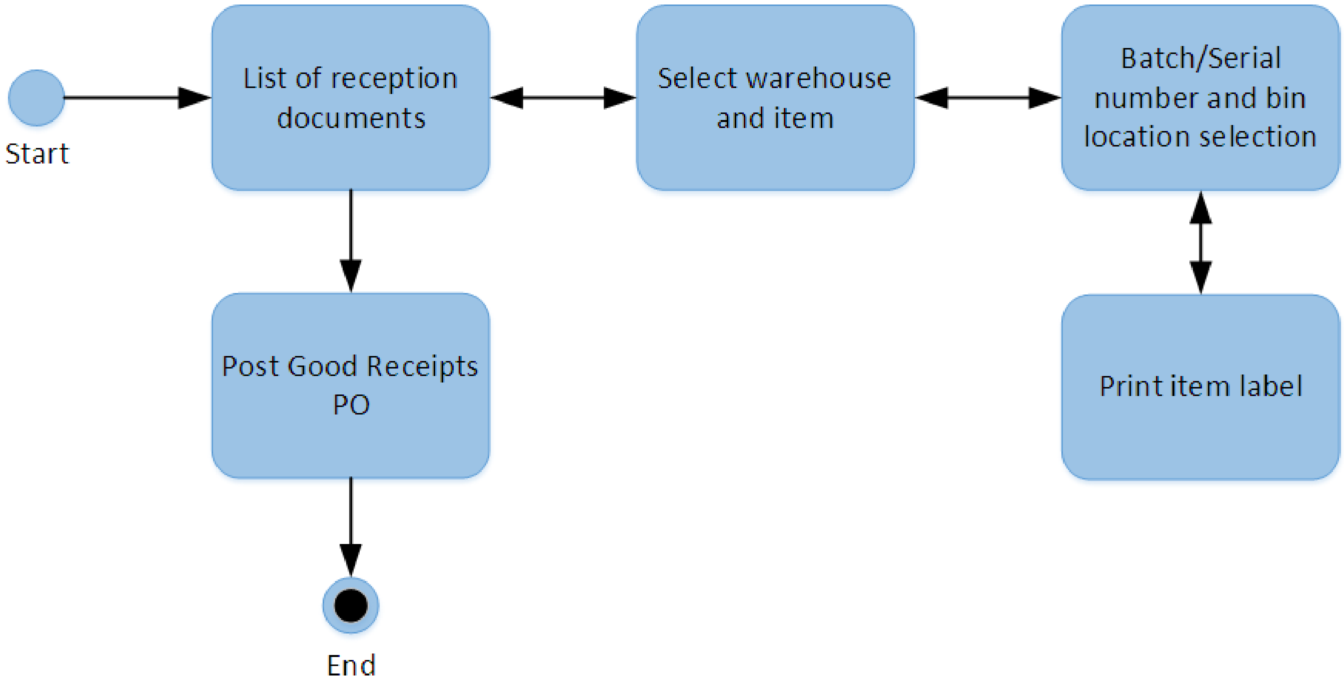
The user can tap Done to go back to the preceding screen with saving the changes; in this case the received quantity in the line of the purchase order will be updated with the newly created quantity. If the user taps Cancel, he will lose all changes and go back to the preceding screen.

The user has to specify the correct quantity of items if batched/serialized items are involved.





2.2. Free GRPO



To receive stock without a purchase order, press the ‘Free GR PO’ button.

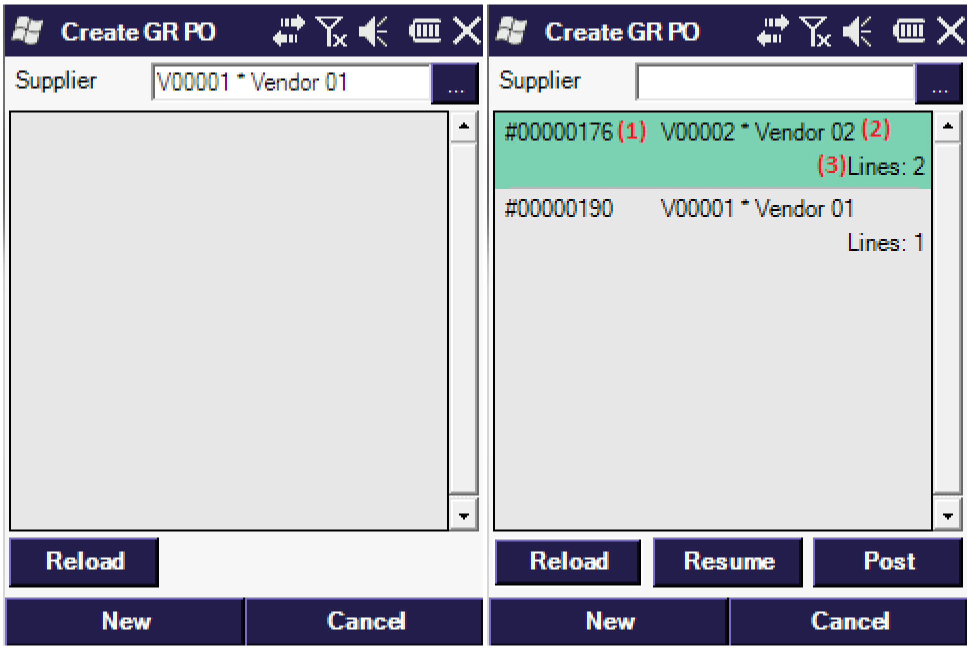
Press the ‘Reload’ button to see the list of the preliminary goods receipt documents. It is possible to filter the preliminary documents based on the supplier. Enter the supplier code to the *Supplier* field or select it after pressing the ‘…’ button.

To create a new *Goods Receipt PO* document, select the supplier then press the ‘New’ button. If there are preliminary Goods receipt documents, two additional buttons are displayed:

- Resume
- Post

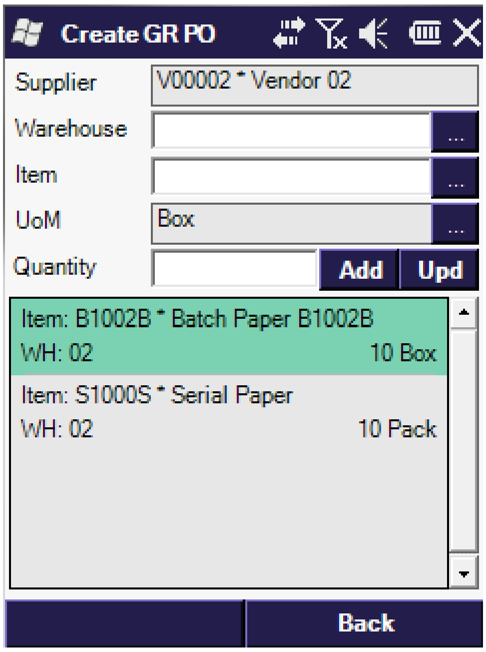
To modify the list of items to receive, select the documents then press the ‘Resume’ button. To create the *Goods Receipt PO* document in SAP Business One, press the ‘Post’ button.
Displayed information:

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



On the next screen add the warehouse. To select the warehouse from a list, press the '…' button. Then add the item code to the *Item* field and specify the UoM code.

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



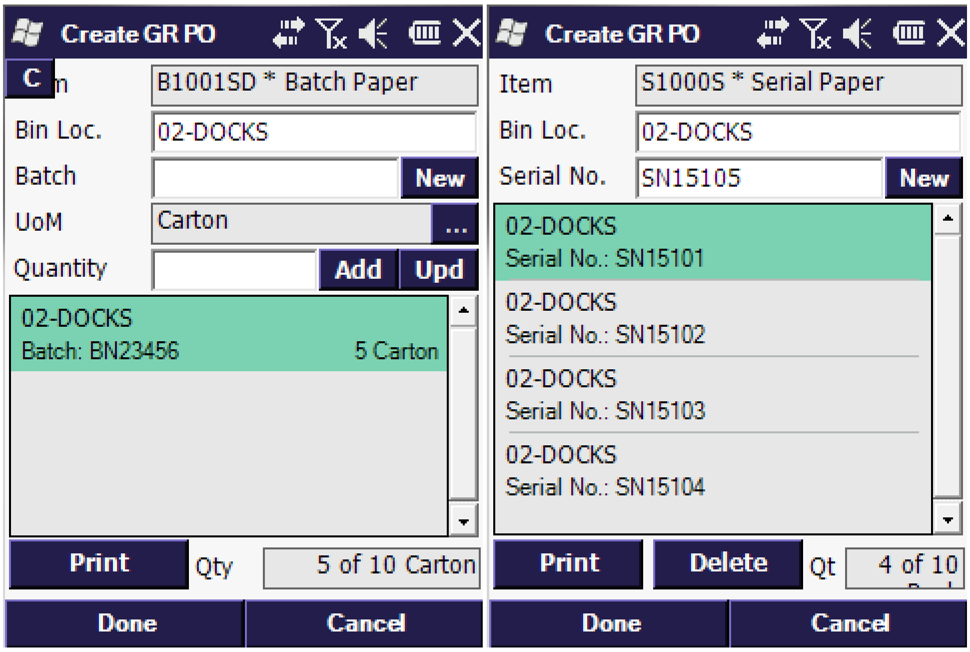
If the destination warehouse has bin locations and/or the product is managed by batches or serial numbers, the system will prompt the user to a screen where the batch/serial number(s) and the bin location can be added.

It is also possible to adjust the UoM of the product. For more information please see: Managing Unit of Measure Groups.

It is possible to receive products with different batch numbers. Press the 'New' button to clear the entered batch number.

Products can be received into different bin locations.

If the item is managed by serial numbers, add the quantity by scanning the serial numbers. To remove a serial number, select its line and press the 'Delete' button.

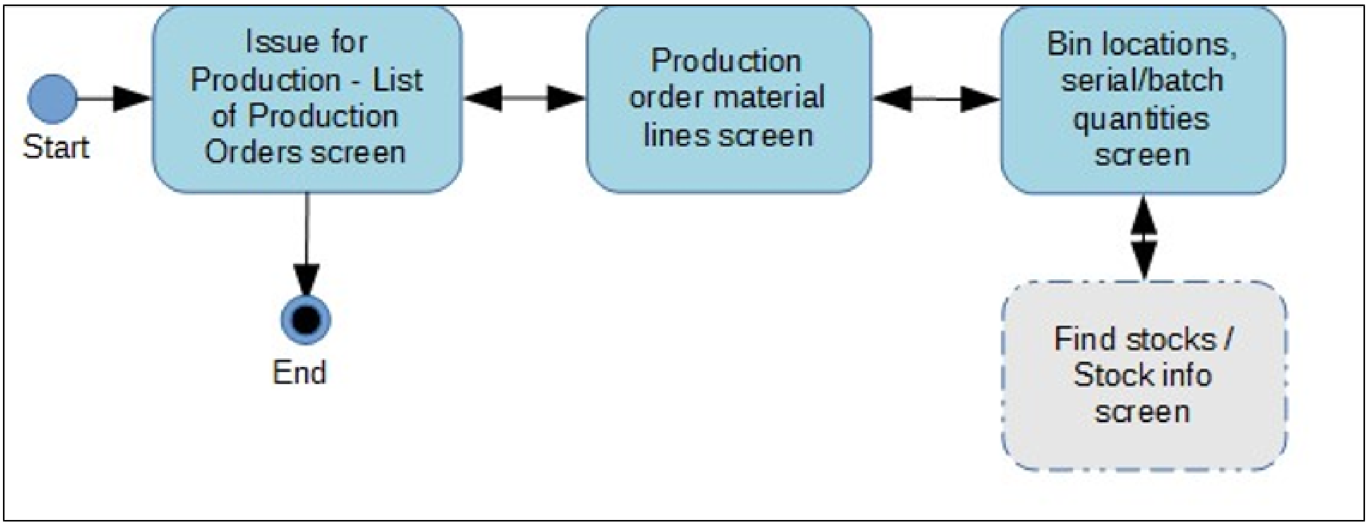


Press the 'Print' button to print the item label of the selected item.

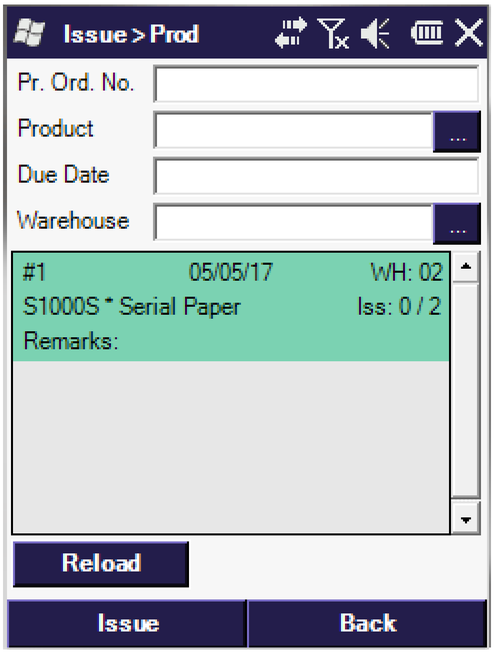
Press the 'Done' button to add the identified products to the list of items to receive or press the 'Cancel' button to go back without adding the products to the list.

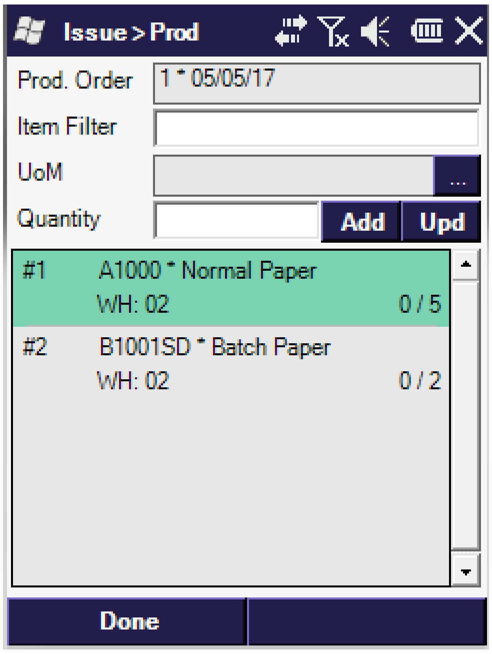
3. Production

3.1. Issue for Production



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

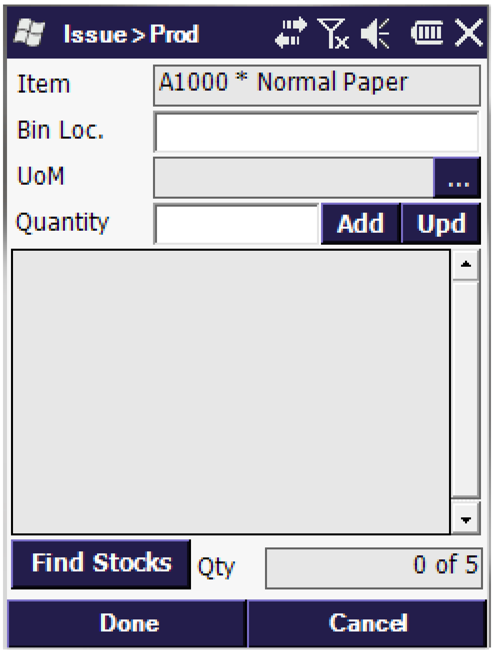


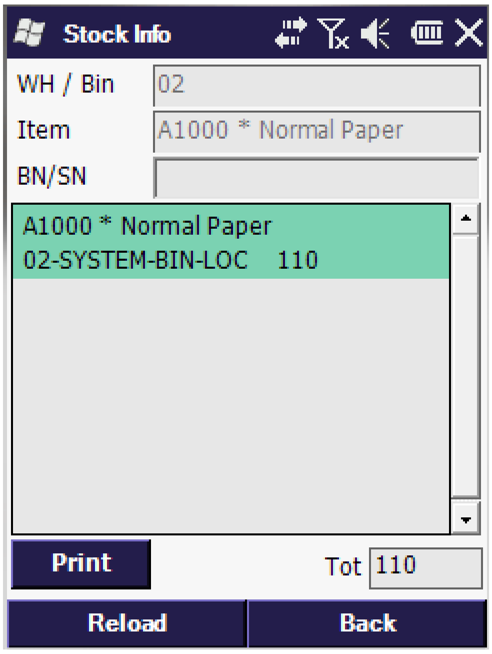


Select a Production Order using the filters available then tap Issue.

On the next screen you can see those items associated with the Production Order that have the manual issue method. Find and select the item you would like to issue, type in a Quantity then tap Add.

In the item addition screen tap the Find Stocks button.

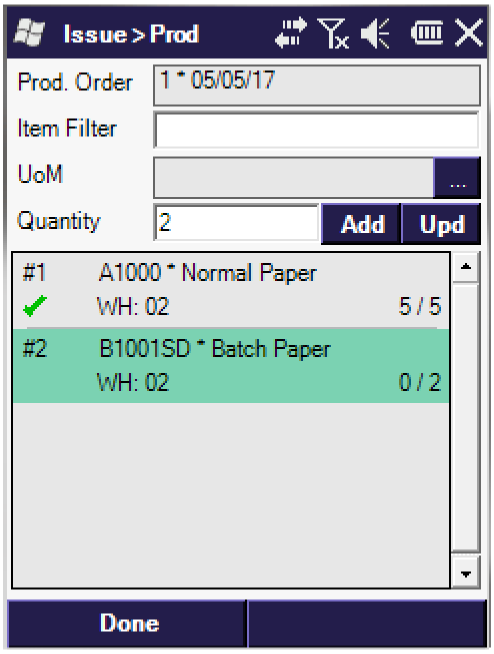


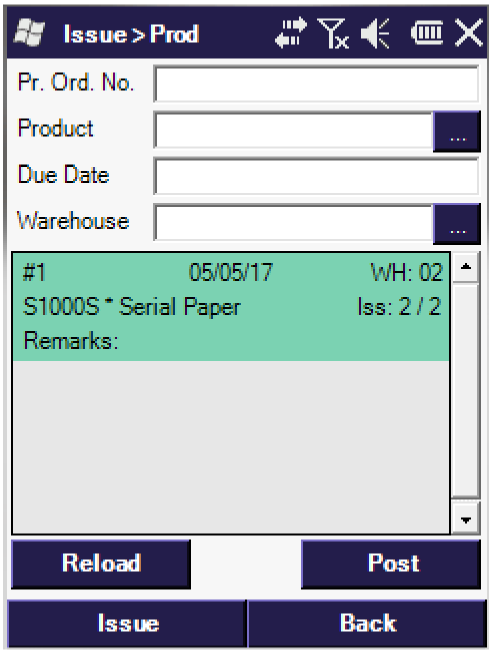


In the following screen you can see all the items available in the inventory. You can plan, which items from which bin should be selected to satisfy the order. Tap the Back button, and then construct the issue for production in the previous screen. You can add items with the Add button.

After you are finished, tap Done.

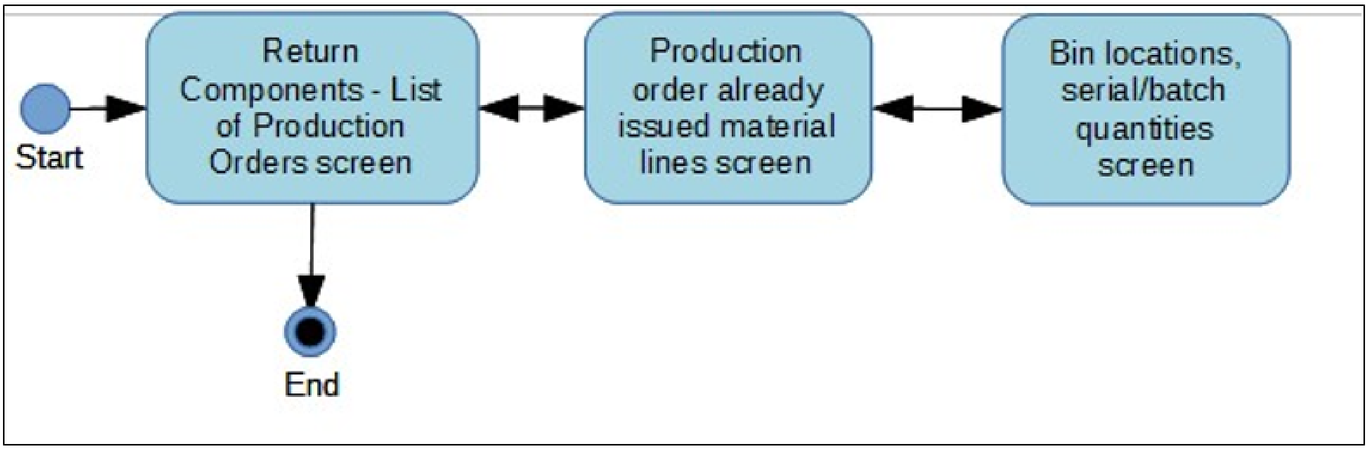
Continue constructing the issue for production in the manner explained. When you are finished, tap Done.



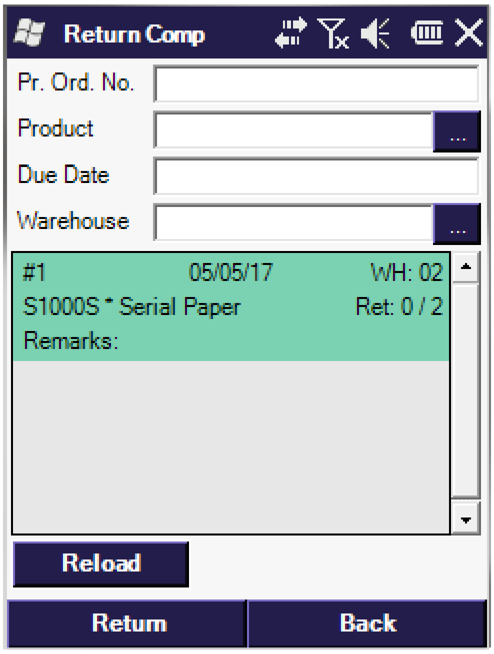


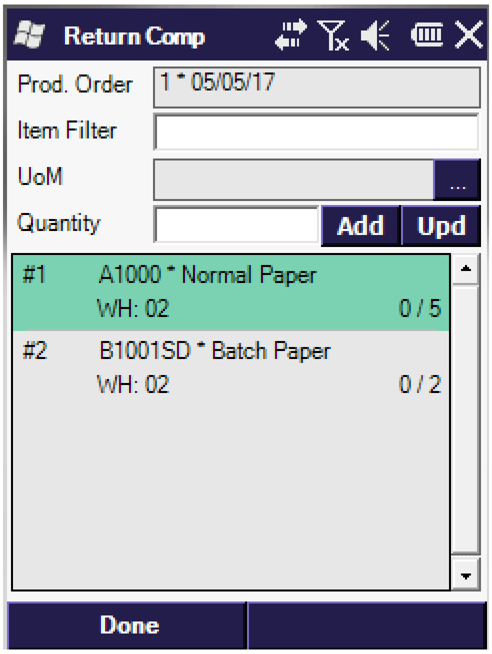
Back to the issue screen, you can select your constructed issue for production and tap Post, to generate the Issue For Production document in SAP BO.

3.2. Return Components



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

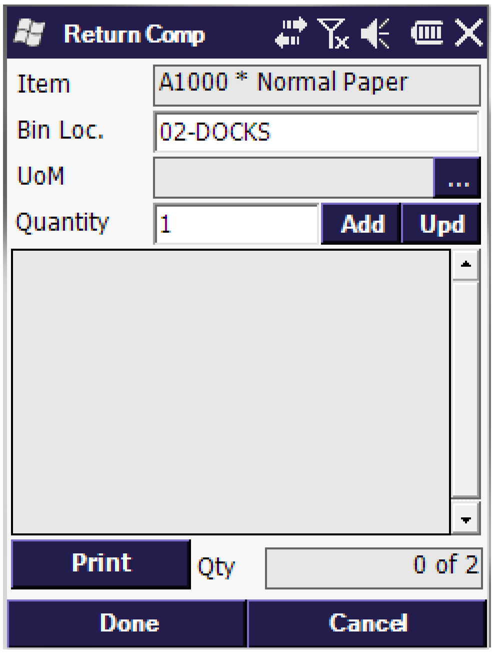


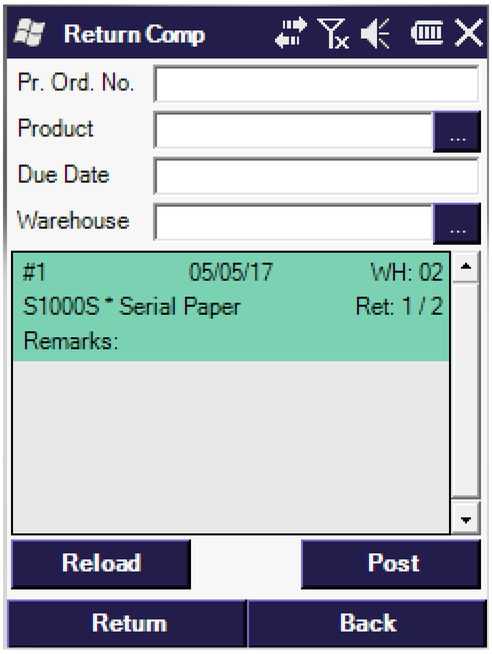


Select a Production Order using the filters available then tap Return.

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.

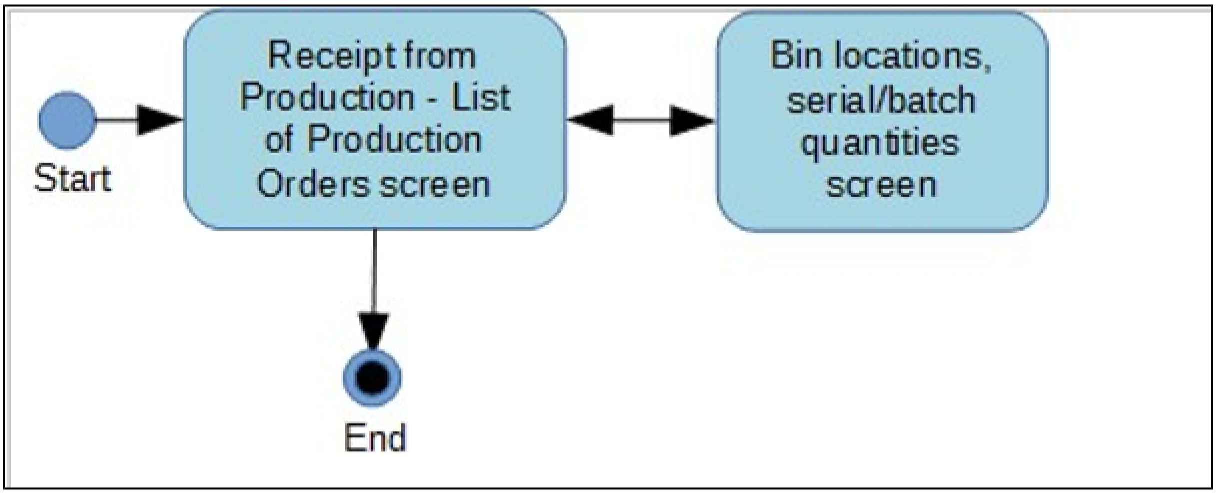
You can plan that which items to which bin should be selected to return. You can add items with the Add button.



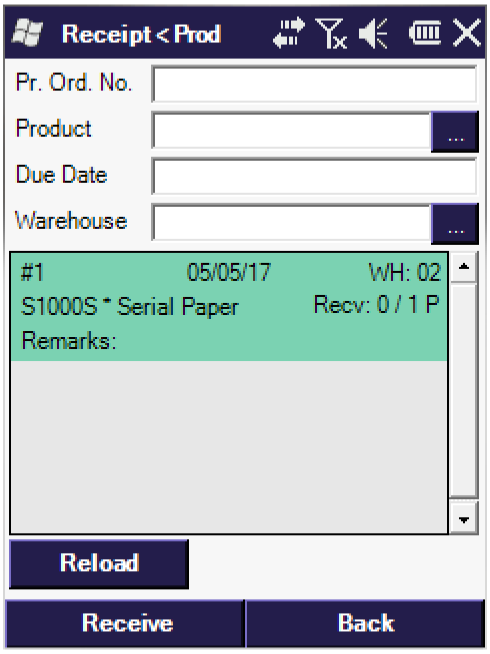


Continue constructing the return from production in the manner explained. When you are finished, tap Done.
Back to the return components screen, you can select your constructed return from production and tap Post, to generate the Return From Production document in SAP BO.

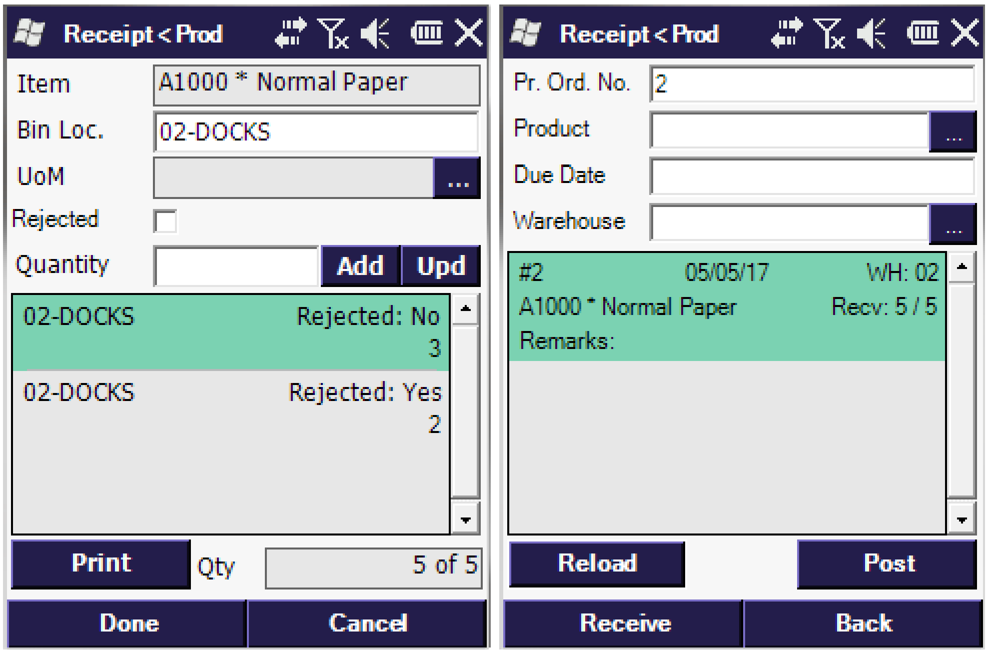
3.3. Receipt for Production



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

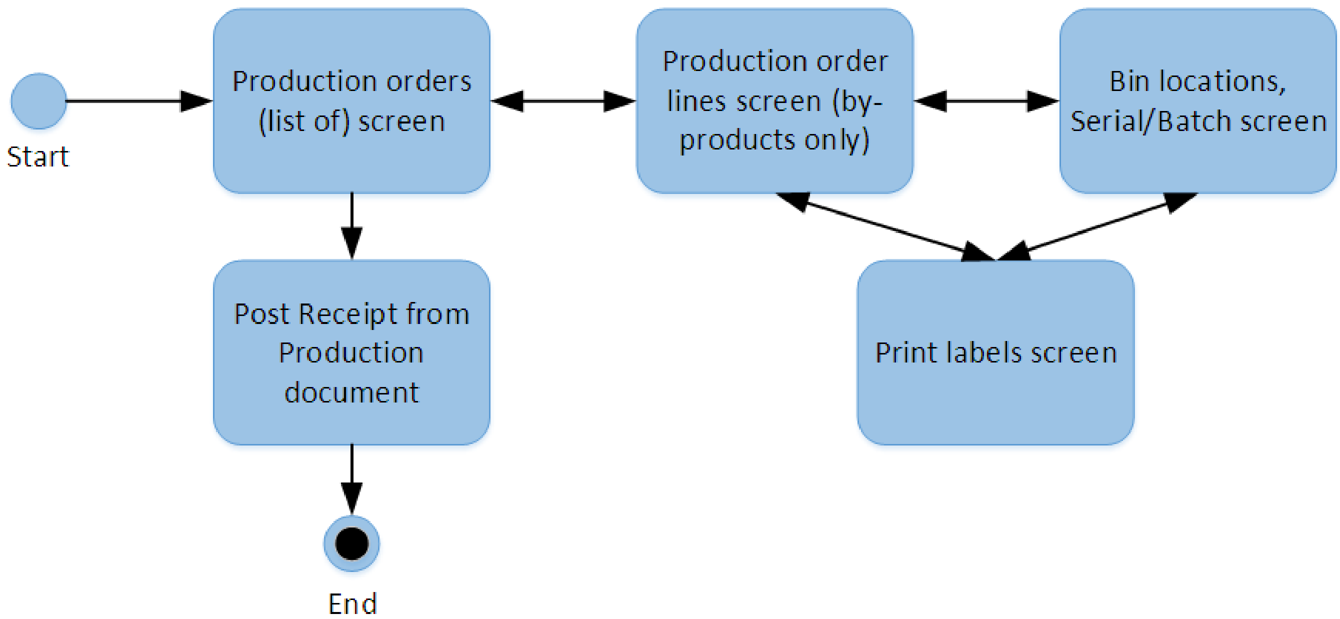


You can add produced items in this screen with the Add button, specifying the bin location and quantity. The bin location is optional. If the warehouse has no bins, no bin will be selected. For a normal item the window will not be prompted, but it will be for an item with a batch or serial. If set, the bin location must exist in SAP BO. If you have a flawed product, check the Rejected checkbox while adding the product.



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

3.4. By-product



To receive by-products from a production, press the ‘By-Products’ button.

On the next screen press the ‘Reload’ button to load the production orders. Every released production order that contains a by-product will be listed on the screen.

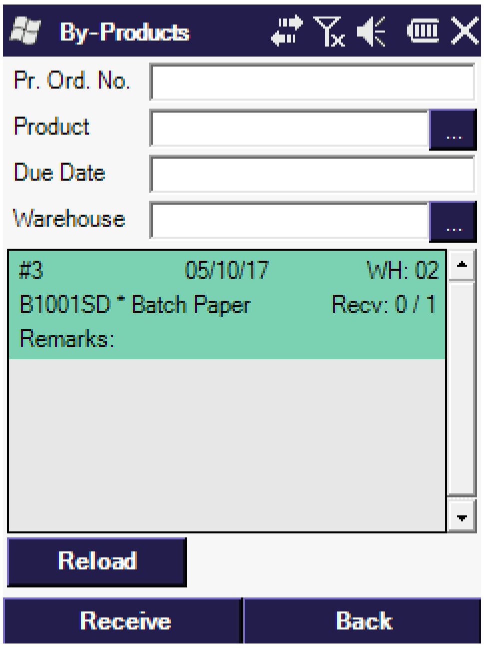
The production orders can be filtered with the following fields:

- 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.

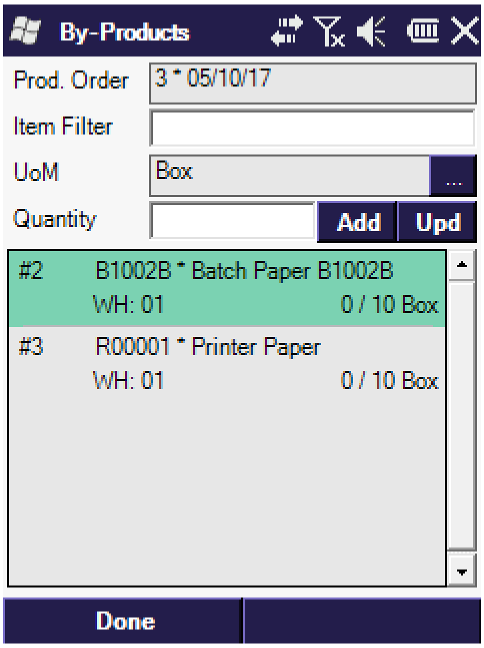
- Warehouse: Filter the list based on the warehouse.

Press the 'Reload' button to apply the filters.

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



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, press the 'Add' button. To replace the current value with the entered value, press the 'Upd.' button.

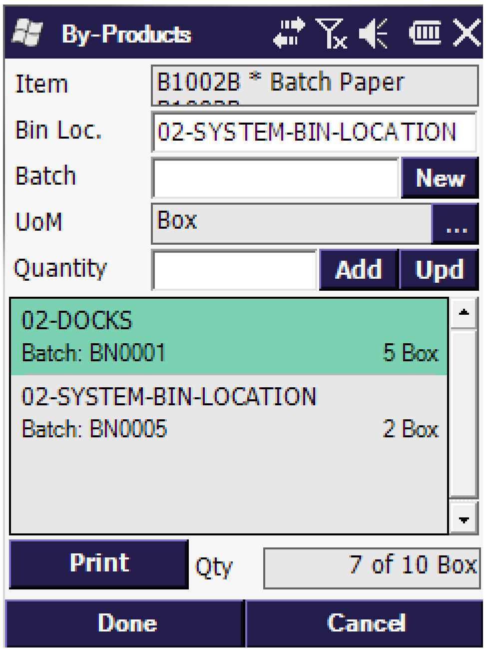


If the destination warehouse for the main product has bin locations and/or the by-product is managed by batches or serial numbers, the system will prompt the user to a screen where the batch/serial number(s) and the bin location can be added.

It is also possible to adjust the UoM of the by-product. For more information please see: Managing Unit of Measure Groups.

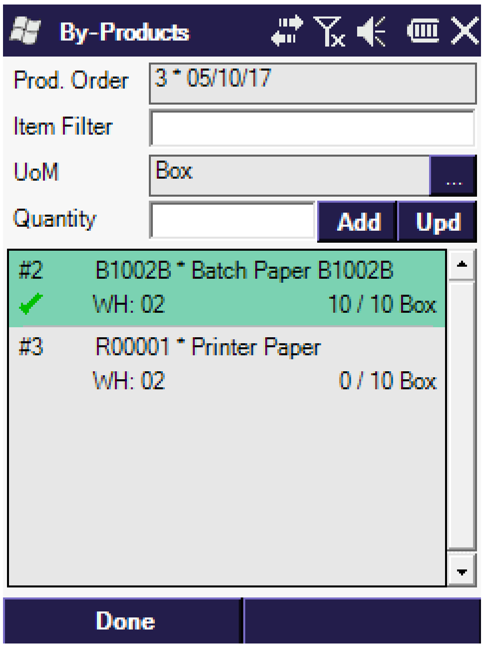
It is possible to receive by-products with different batch numbers. By-products can be received into different bin locations.

If the item is managed by serial numbers, add the quantity by scanning the serial numbers. To remove a serial number, select its line and press the 'Delete' button.



To go back to the list of by-products press the 'Done' button. To print the product label, select the line then press the 'Print' button. On the next screen select the printer and add the number of labels to print. Press the 'Print' button to print the label or press 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. Press the 'Done' button to go back to the list of production orders.



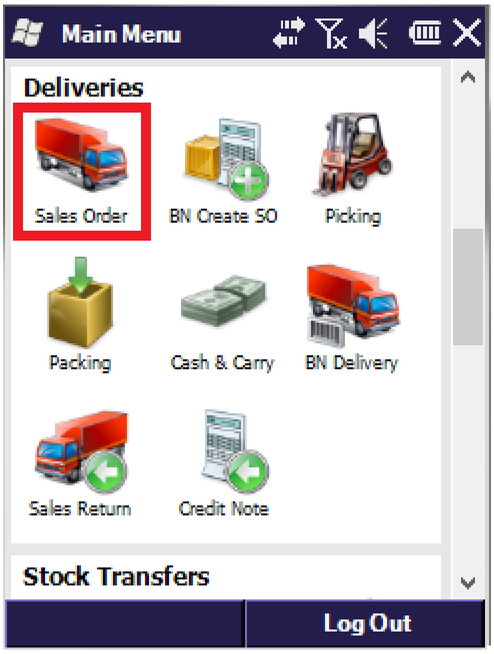
After the total quantity has been added, the system goes back to the previous screen. Select the next by-product or press the 'Done' button to finish the reception.

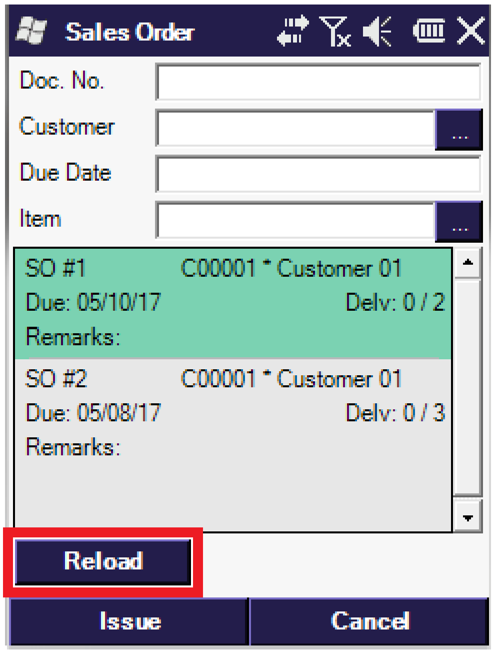
To create the *Receipt from production* document, select the line of the production order then press the 'Post' button. The 'Post' button is only active if there are already identified by-products for the production order.

4. Deliveries

4.1. Sales Orders

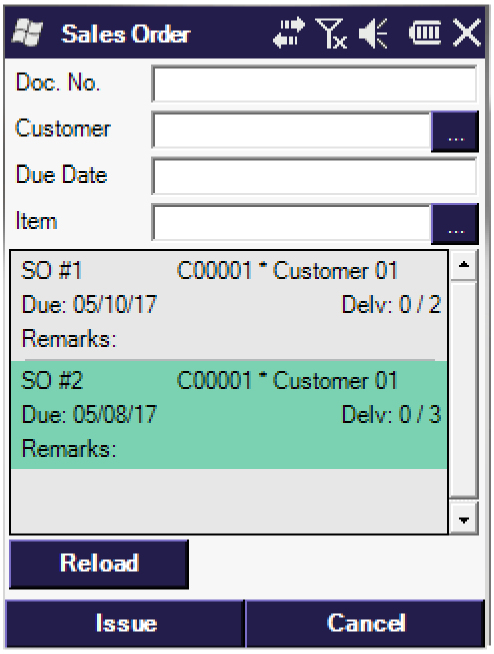
From the Main Menu the Sales Order entry leads to the form that can create a sales order in SAP BO. First the user will be prompted a list of the existing sales orders in the SAP BO database. Filters can be used to find relevant sales orders quickly. The user can set the filters and then tap the Reload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

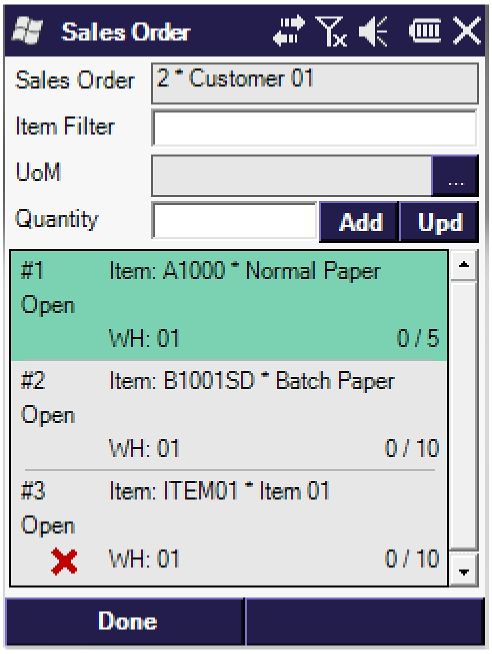




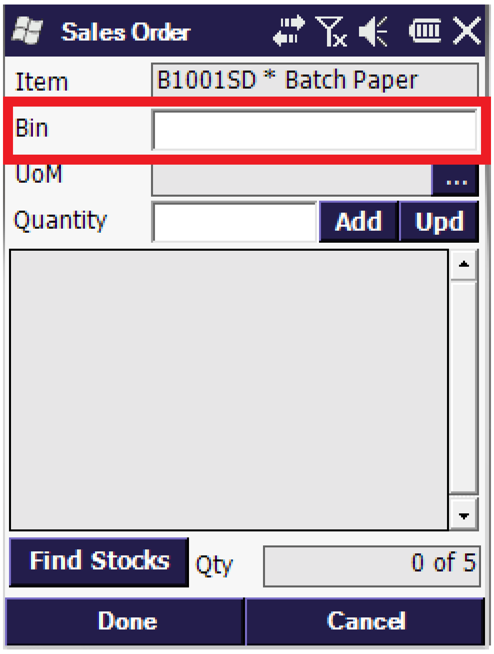
The entry contains the document number of the sales order, the customer's code and its name, the due date and the already delivered full sales order lines/all lines. As you can see in this example no deliveries have done yet for the filtered sales orders. If the user taps Cancel, he will be navigated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

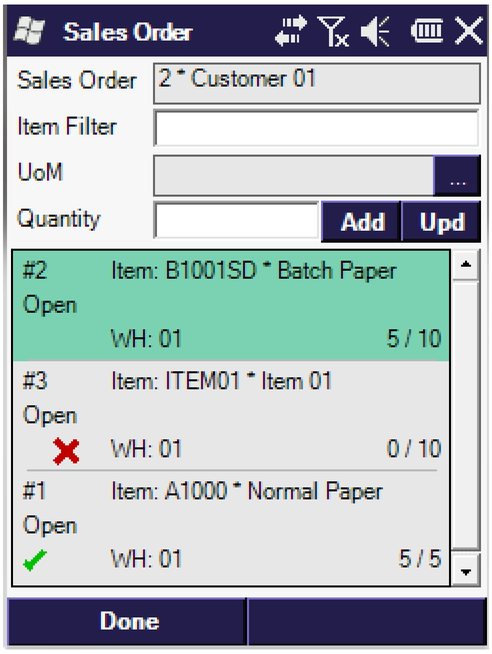
The user can select an entry and then tap Issue to display the lines of the order. In this example you can see the status for the lines of sales order 2 is open.



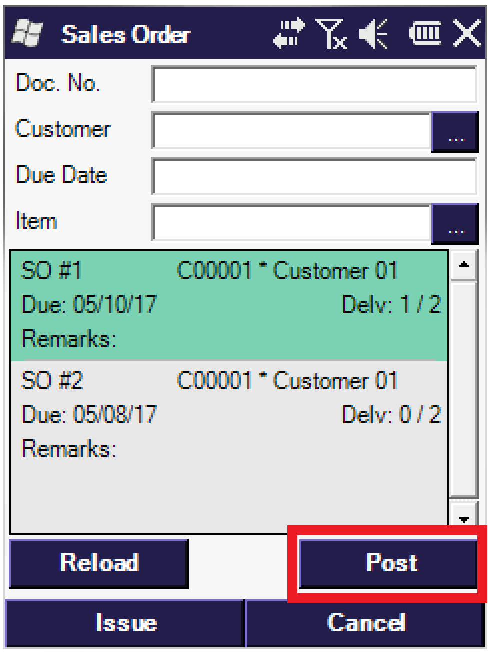


There are two possibilities to select a line, you can use the read the barcode, or you can add it manually from the list. Once you have added a line, the bin location and the quantity is required. With the Find Stock function, the user has the opportunity to look for further information about the related item in the warehouse.





After to press 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.



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.

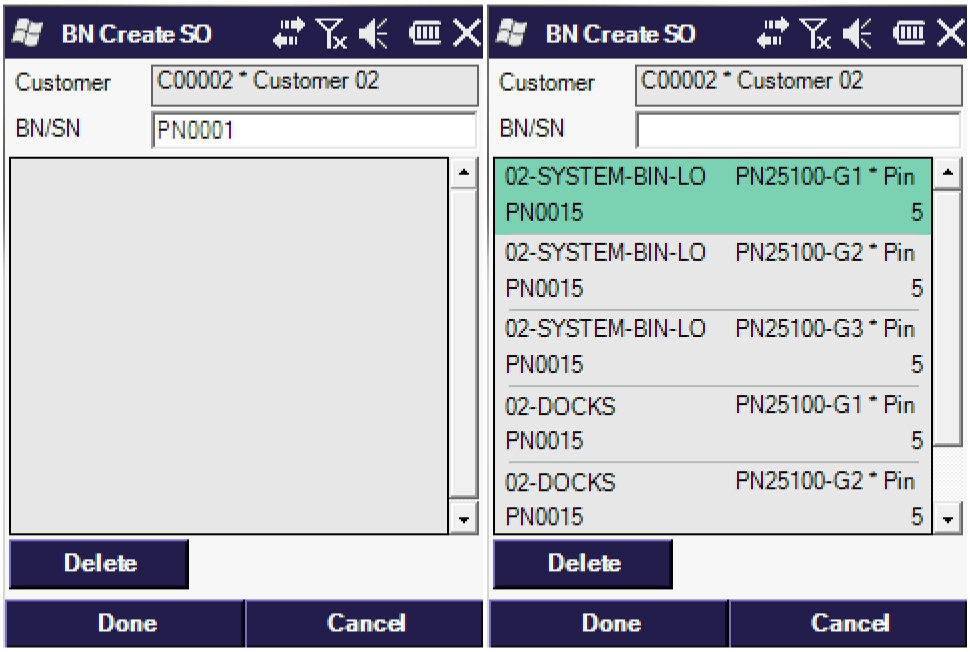
First add the customer to the 'Customer' field. To select the customer from a list, press the '…' button. To create a new sales order press the 'New' button

To see the list of the preliminary sales orders, press the 'Reload' button. Please 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.

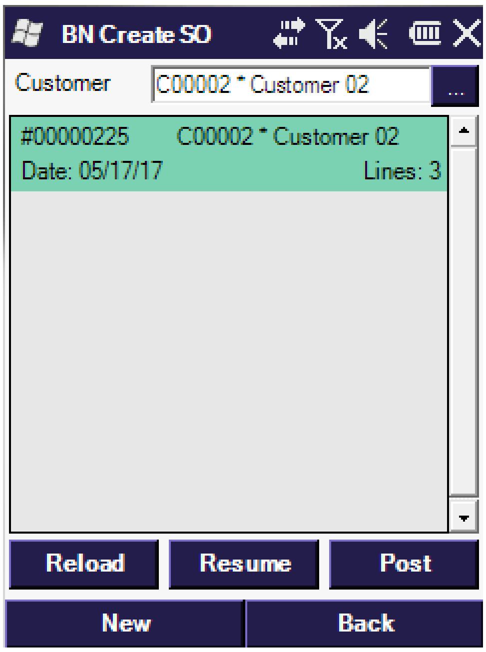
To remove a product from the list, select its line then press the 'Delete' button.

Scan the next batch number or press the ‘Done’ button to create the preliminary sales order.

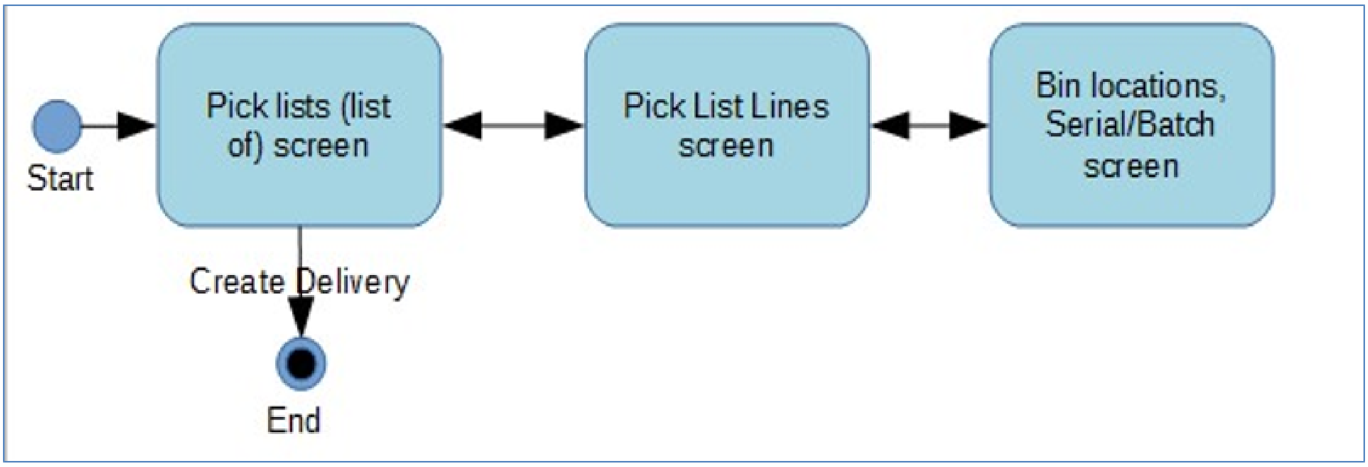


The system will return to the list of the preliminary sales orders.

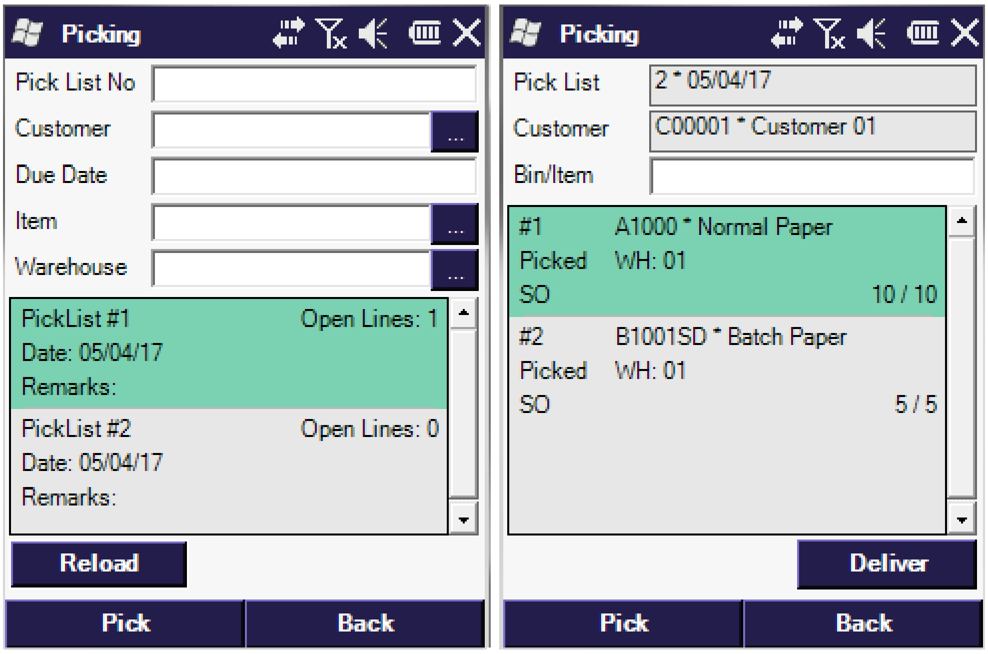
- Press the ‘Reload’ button to reload the screen.
- Press the ‘Resume’ button to adjust the selected preliminary order.
- Press the ‘Post’ button to create the sales order from the selected preliminary order. The sales order will be created in SAP Business One.



4.3. Picking



On the Picking screen the user can filter the existing pick lists according to Pick list number, Customer Code, Due Date, Item Code and Warehouse. Tap Reload after you have filled in the relevant fields to load the appropriate pick lists.
In the grid you will see the pick list number, the date of the pick list, and the number of lines that the pick list contains. You can select one of the lines and tap Pick. The next window will show the lines of the pick list. Here you will see the pick list number and due date and the customer name and description. If you enter a bin location code in the Bin Code field and this bin code appears only once in the list, then this line will be selected. If the bin code appears several times in the list, then the list will be filtered according to the bin location.

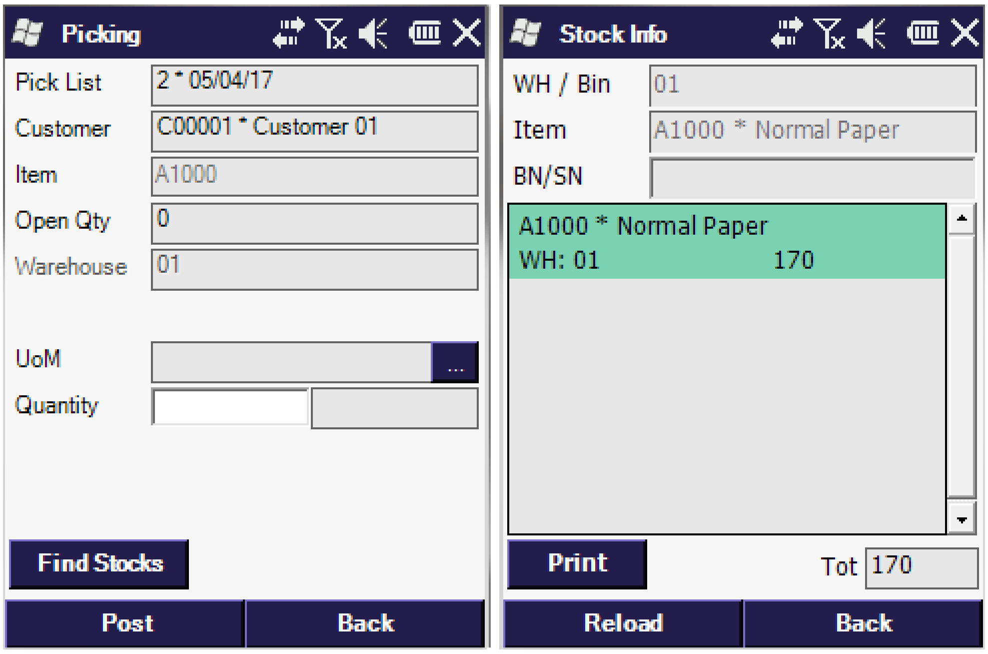


Here select the item line that you want to pick and tap Pick or you can go back to the previous screen by tapping Back.

The lines are sorted by:

1. LineStatus: Open, Picked, Closed
2. BinLocation - AlternativeSortCode (if exists)
3. BinLocation - BinCode
4. ItemCode

On the next screen you can enter the bin location to which the item will be received. It is optional. If the warehouse has no bins, no bin will be selected. For a normal item the window will not be prompted, but it will be for an item with a batch or serial.



If you tap button Find Stocks, the Query Stocks function will open with the item code and warehouse code prefilled and you can search for stocks that you need to be able to enter them for picking.

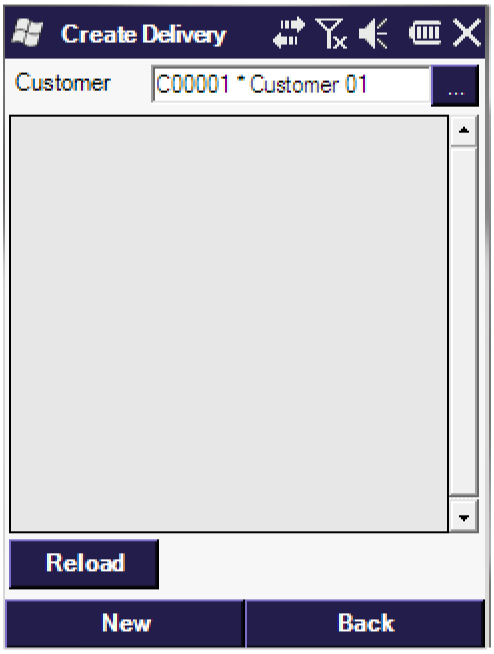
Note: If the pick list already contains assigned batch/serial numbers or bin locations, then you can only pick those batches/serials and bin locations and the Rec.Bin and Rec.Batch fields are prefilled with them. You can remove the recommendations in SAP BO by opening the pick list, right click the line, and choose Bin Location Allocation or Batch/Serial Selection and then choose Clear Allocations or remove the assigned batch/serial numbers.

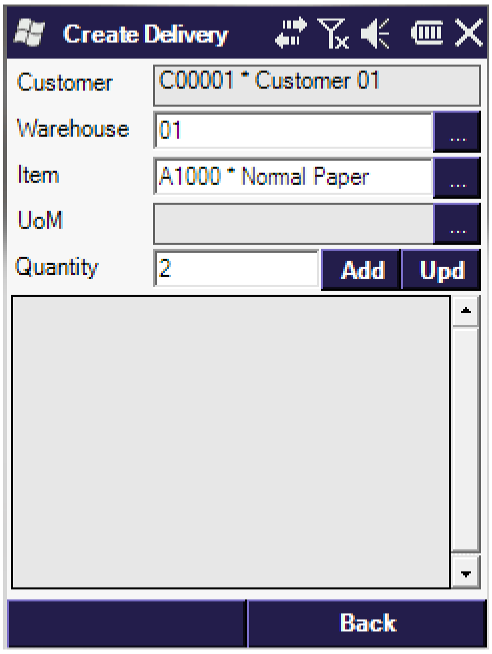
To validate the picking tap Post. Then you can pick other stocks from other location if needed or tap Cancel to go back to the previous screen.
On the picking screen tap the Deliver button to create the delivery based on the pick list. If the delivery can be created, you will get a message with the delivery number.

Note: you can create only one delivery for one pick list line, so if you created a partial delivery for a pick list line, you have to create another pick list line for the remaining quantity. It is possible to create delivery Draft documents with custom configuration. For more information please see: Customization Technologies - Pick Lists

4.4. Cash & Carry

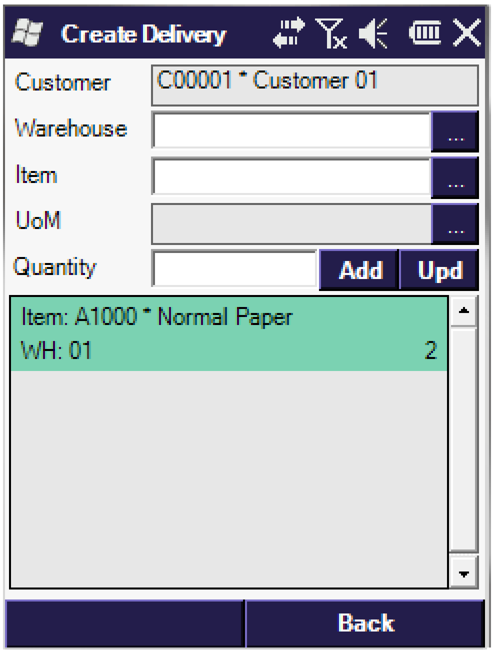
With this function you can create “cash & carry” delivery for a customer and pick the items you want to deliver. First you have to enter the customer number and tap New.

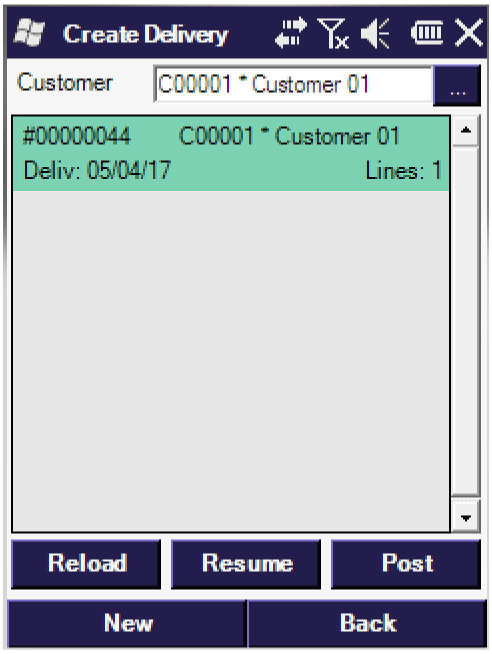




On the next screen you can enter the warehouse, item code and quantity that you want to deliver and then tap Add or Upd.
After that you can choose the bin location from which to take the stock and the serials/batches if needed. It is optional. If the warehouse has no bins, no bin will be selected. For a normal item the window will not be prompted, but it will be for an item with a batch or serial.

You can check the actual stock with button Find Stocks, then 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.



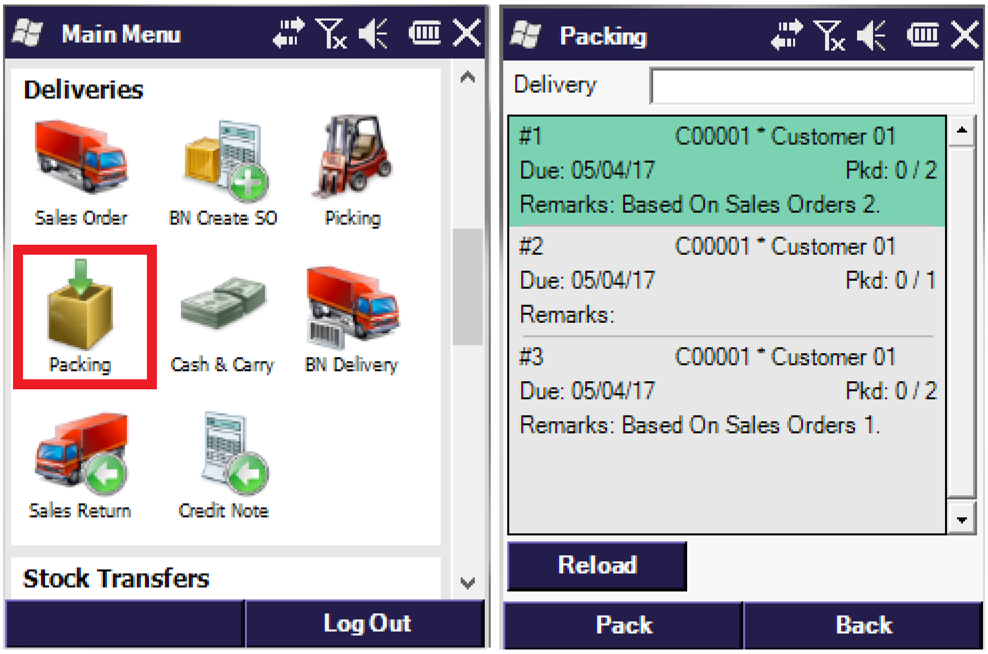


If the delivery can be created, you will get a message with the document number of the new delivery.

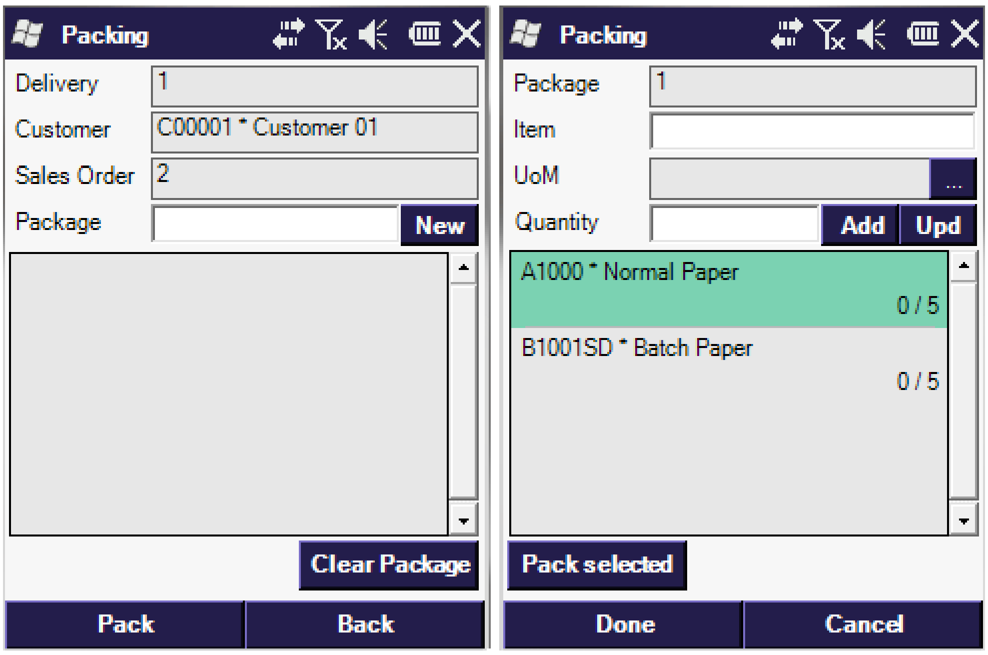
If you tap Back instead of Post, the delivery lines will be added to the mobile transaction data, but the delivery will not be created. You can come back later on, and enter the customer code tap Reload then select your delivery and tap Resume. This way you can continue working on the same delivery without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

4.5. Packing (Delivery)

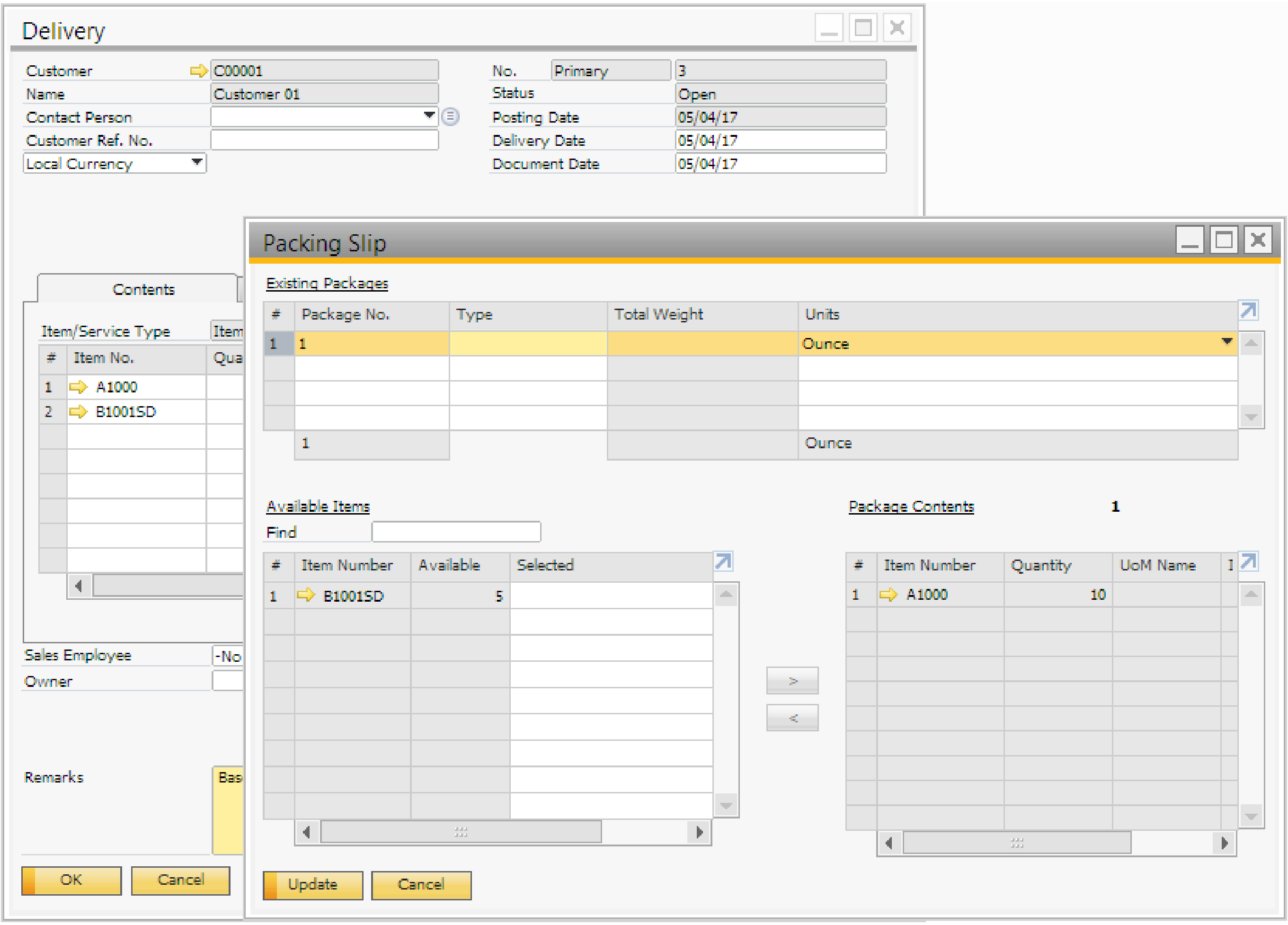
The Packing function can be started from the Warehouse main menu.
On the Packing (list of deliveries) screen, you can select from a list or it is possible to input a Delivery number and press Reload to filter to only that delivery document number. After selecting the Delivery document, press the Pack 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 a customizable user query ***bx_mobile_warehouse_get_new_delivery_packagenumber***.
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 press Add / Upd button to set that quantity packed.



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 press 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.

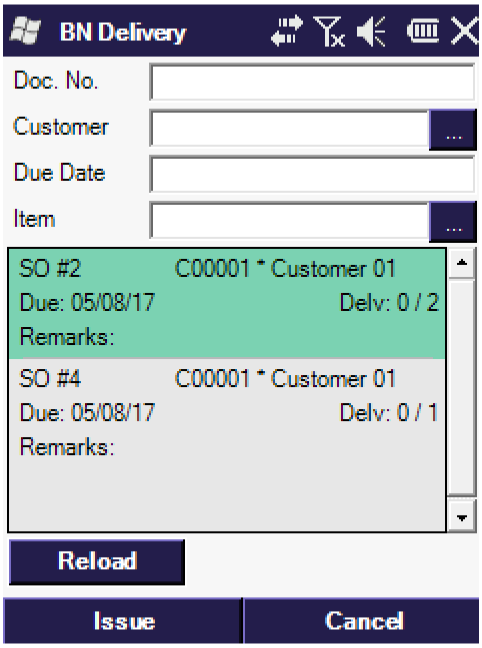
Press the ‘Reload’ button to see the list of sales orders. Every sales order that contains at least one open line with an allocated batch will be listed. It is possible to filter the list with the following values:

- Doc. No.
- Customer
- Due Date

- Item

Press again the ‘Reload’ button to apply the filter(s).

Please 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.*

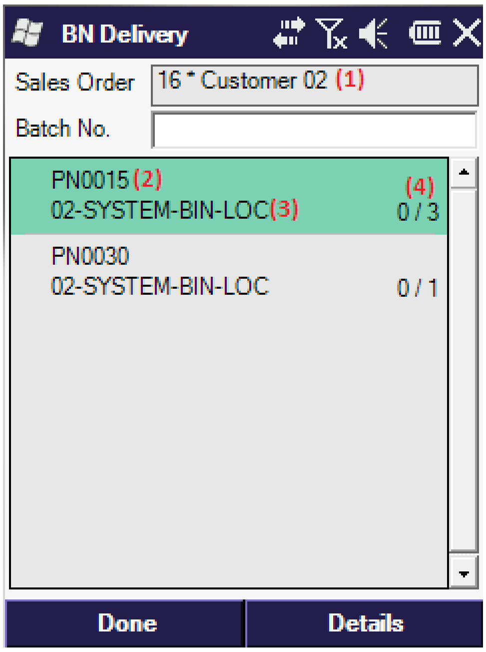


Select the sales order then press the ‘Issue’ button.

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:

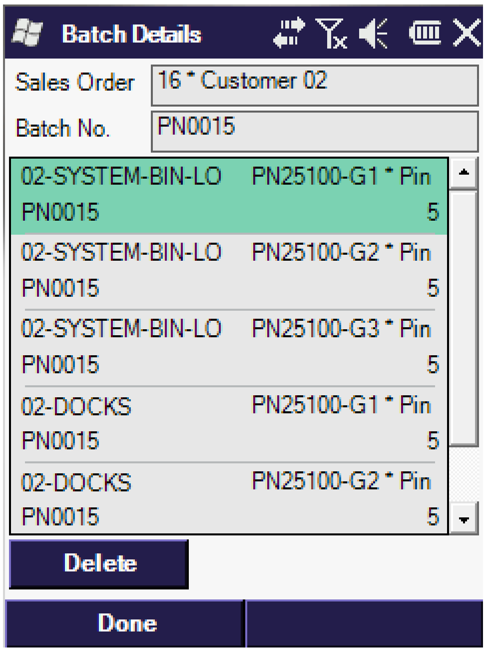
1. Sales order number*Customer name
2. Batch number
3. First bin location
4. Number of picked sales order lines/Number of sales order lines with the batch allocated



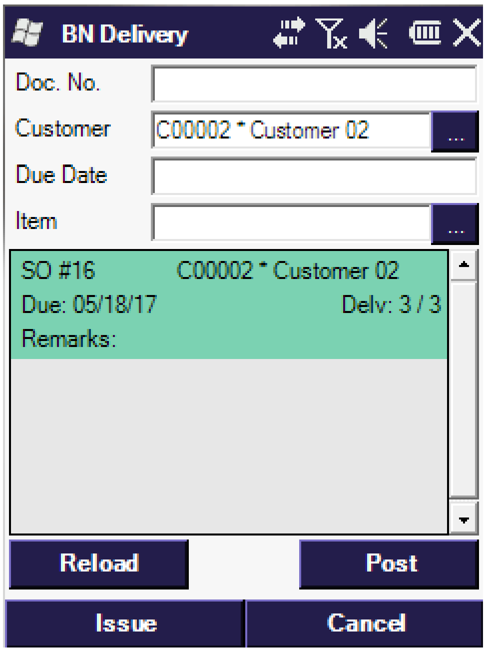
Press the 'Details' button to see the details of the picked stock on the selected line. On the next screen the stock to pick is listed. Different items and stocks stored on different locations are displayed on separate lines.

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

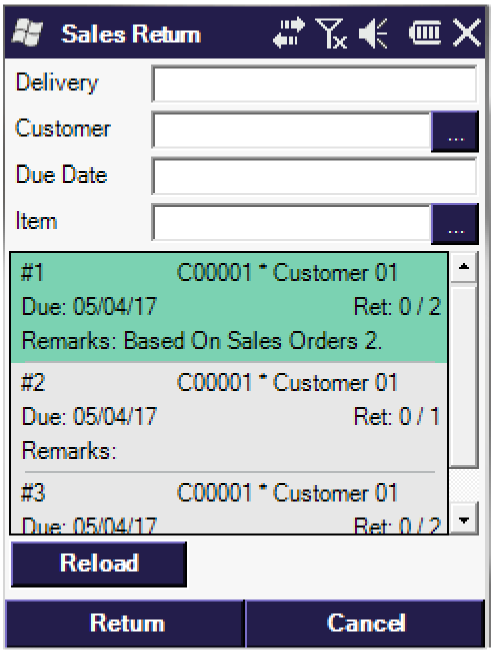
Scan the next batch number or press the 'Done' button to finish the picking. The system will return to the list of sales orders.

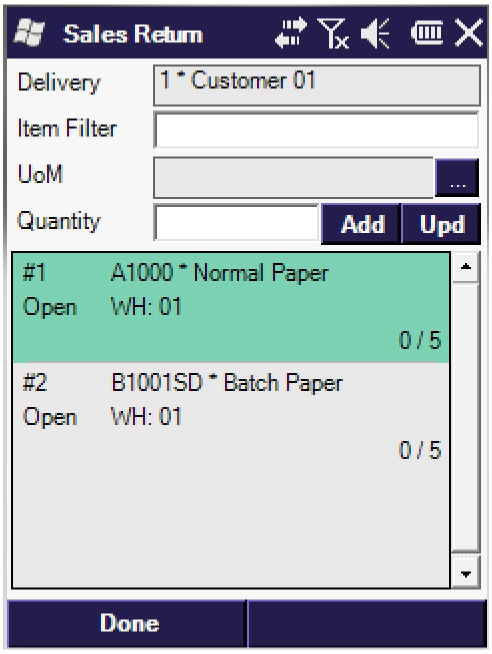


Select the sales order and press the 'Post' button to create the delivery document. The *Delivery* document will be created in SAP Business One.



4.7. Sales Return





Te Sales Return process is similar to the Sales Order process on the mobile. The input is the Delivery document and the result is Sales Return document. The maximum amount is limited by the Delivery document line quantities.

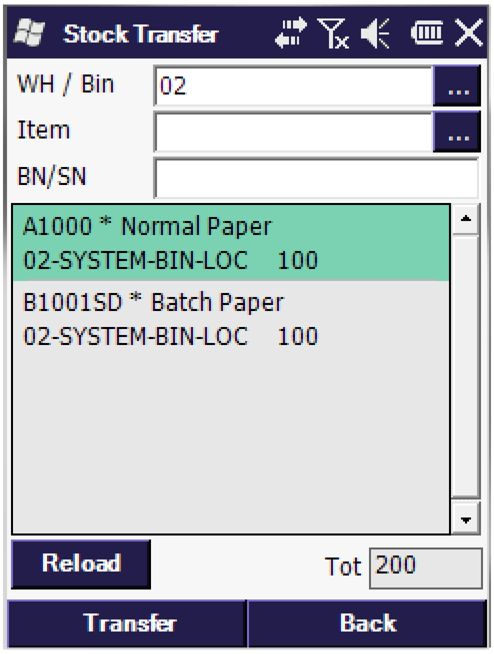
4.8. AR/Credit memo

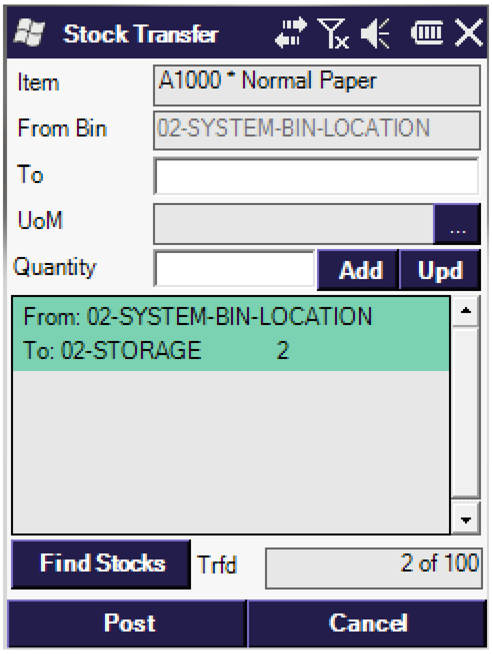
The AR/Credit memo process is similar to the Sales Order process on the mobile. The input is the A/R Invoice document and the result is A/R Credit Memo document.

5. Stock Transfers

5.1. Stock Transfer

With stock transfer you can relocate stock from one bin location to another (the bin locations can be in different warehouses).



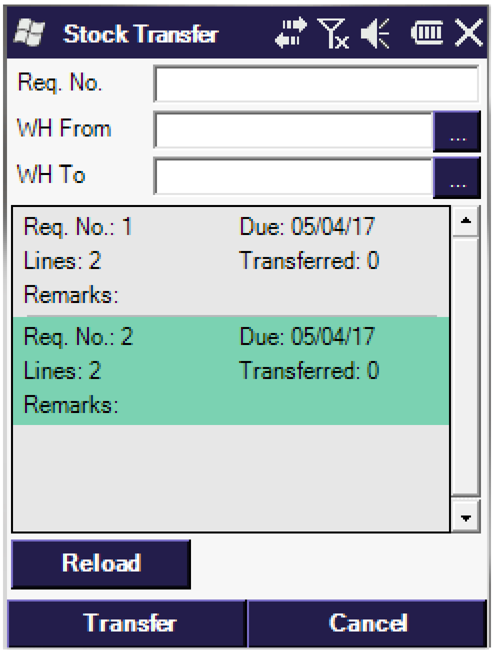


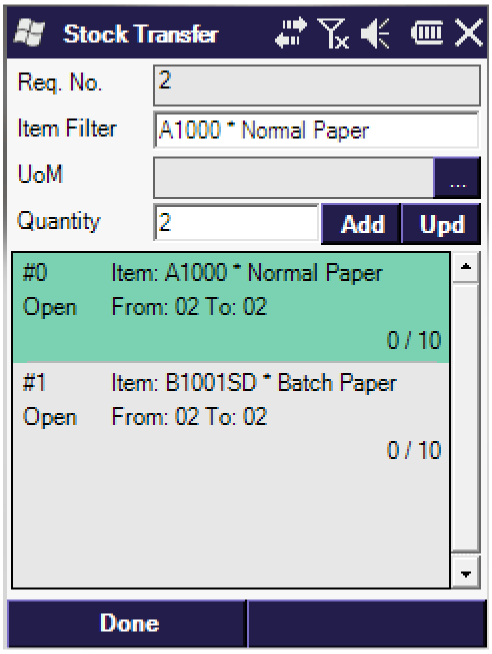
First you can filter the stock that you want to transfer according to Warehouse, Bin Location, Item Code or Batch Number. Then you can tap Reload to load the relevant stock, select one of them and tap Transfer.

On the next screen you have to enter the target bin location, the batch/serial number if any and the quantity, then tap either Add or Upd. If you are finished adding the stocks to be transferred, tap Post to create the stock transfer document in SAP BO.
If you tap Find Stocks button, you will get to the query stocks functionality, only the item code will be prefilled for you, and you cannot change it. You can learn more about query stock below.

5.2. Stock Transfer Request

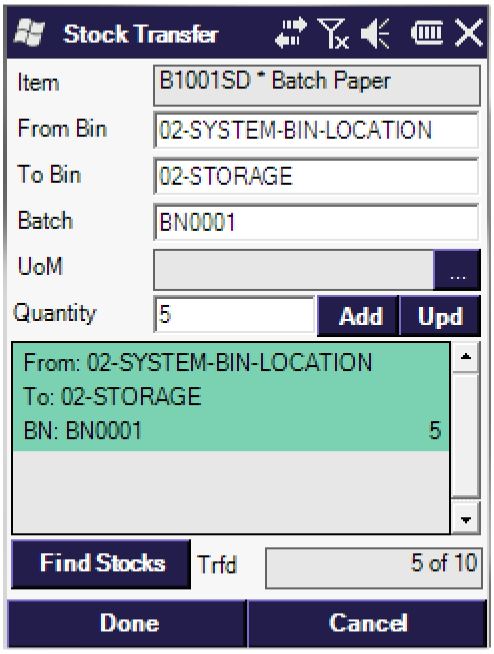
With this function you can handle inventory transfer request documents. First you have to create the documents in SAP BO and then you can load them on the mobile device. You can filter them according to Request Number, Warehouse from and Warehouse to. If you tap Reload, the existing requests will be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

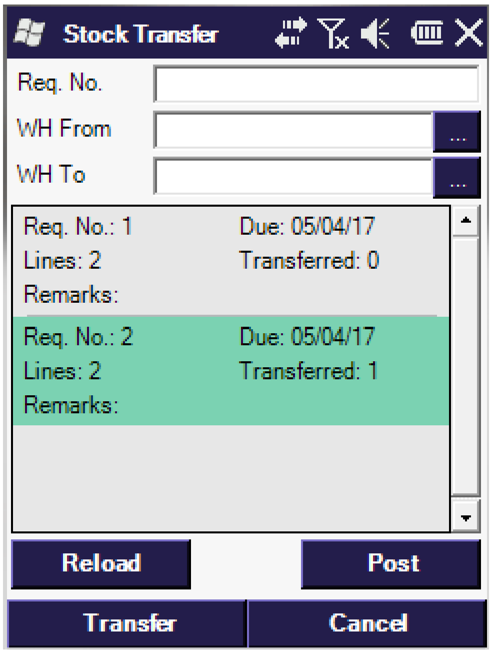




Here you can select the inventory transfer request that you want to process and tap Transfer. On the next screen you can see a list of the items that are on the request:

Here you can either select an item in the grid and tap Add or Upd, or you can enter one above the grid in field Item Filter, enter a quantity, then tap Add. Note: you cannot add items that are not on the stock transfer request document.



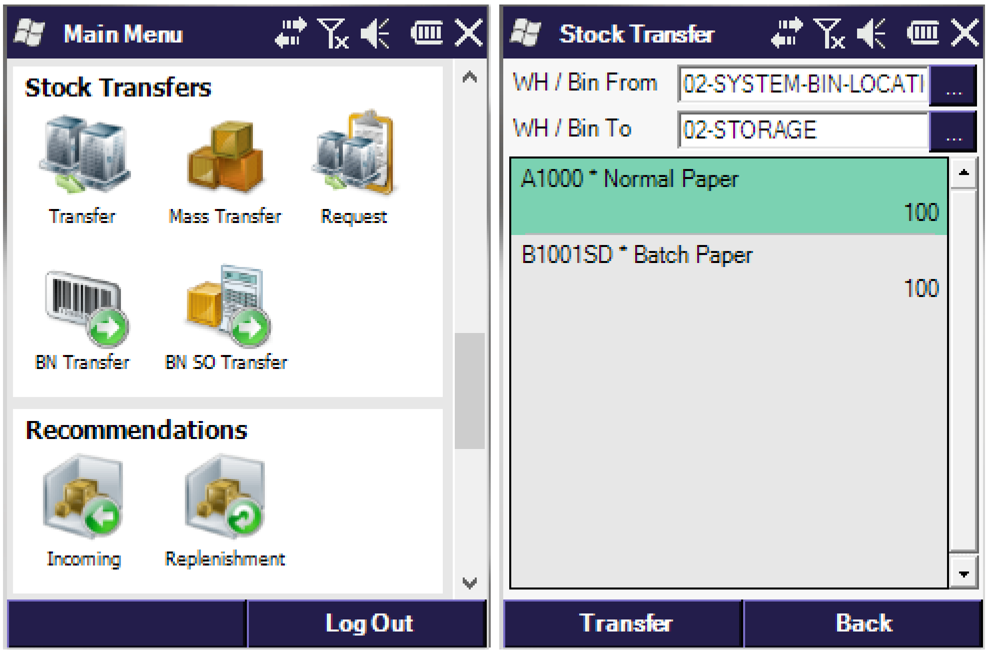


Here you can enter the From bin location and the To bin location, the serial/batch number (if needed) and the quantity, then you can tap Add or Upd. You can check the existing stocks with the Find Stocks button.
If you tap Done, you will get back to the previous screen and your entered data will be taken 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 inventory 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

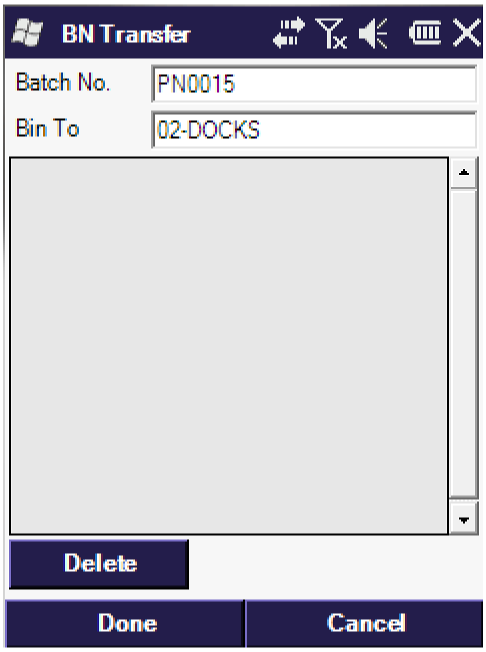
This function allows you to move all stocks from one bin location to another (or one warehouse to another, if the warehouse is non-bin location warehouse).
First you must input the WH / Bin From, after leaving this field you will see all the current stocks on that location in the list. There is no option to select only partial quantities. Next the WH / Bin To field must be entered, and after pressing 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. *Please note: Only sales items can be moved with the BN Transfer function.*

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

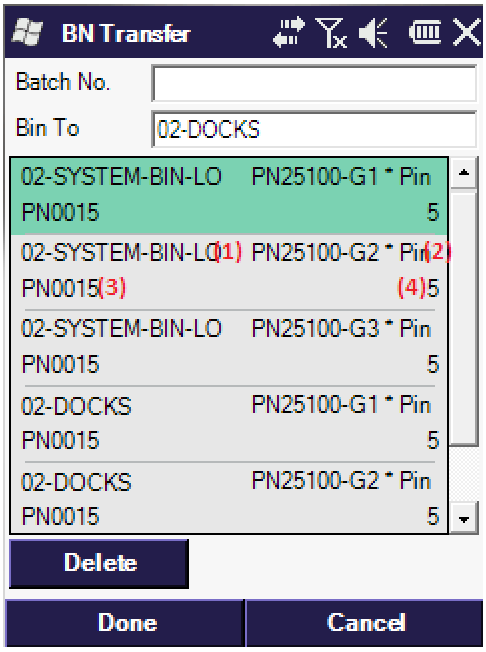


Stock with the scanned batch number will be listed on the screen. Different items and stocks stored in different bin locations are listed on separate lines.

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

Displayed information:

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



Press the ‘Done’ button to transfer the stock. An *Inventory Transfer* document will be 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.

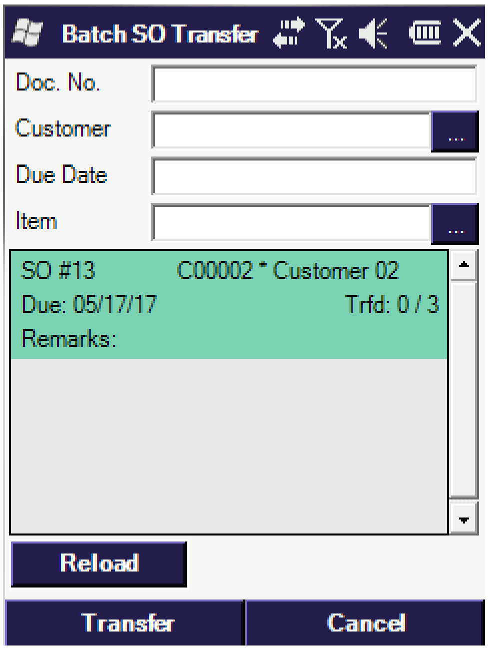
Select the sales order from the list. Every sales order that contains at least one open line with an allocated batch will be listed. Please note: *The BN SO Transfer function is only meaningful for sales orders created from the BN Create SO function. It is not advised to move stock with this function 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

Press the ‘Reload’ button to apply the filter.

Select the sales order then press the ‘Transfer’ button to transfer the items.



Scan the destination bin location then scan the first batch.

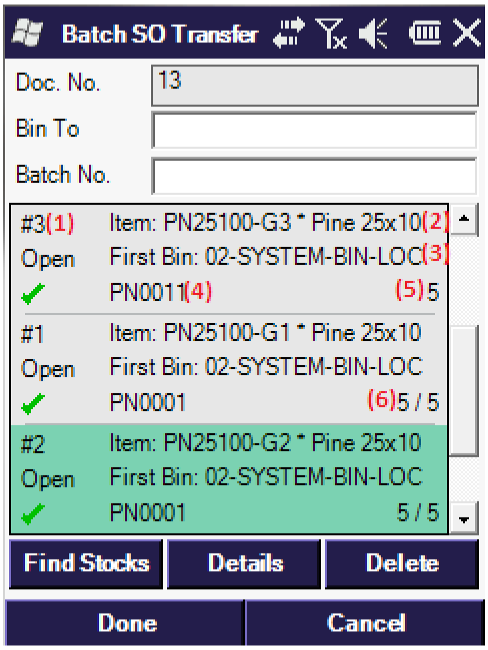
Stock with the scanned batch number will be listed on the screen. Different items and stocks stored in different bin locations are listed on separate lines.

Scan the batch number to pick the items.

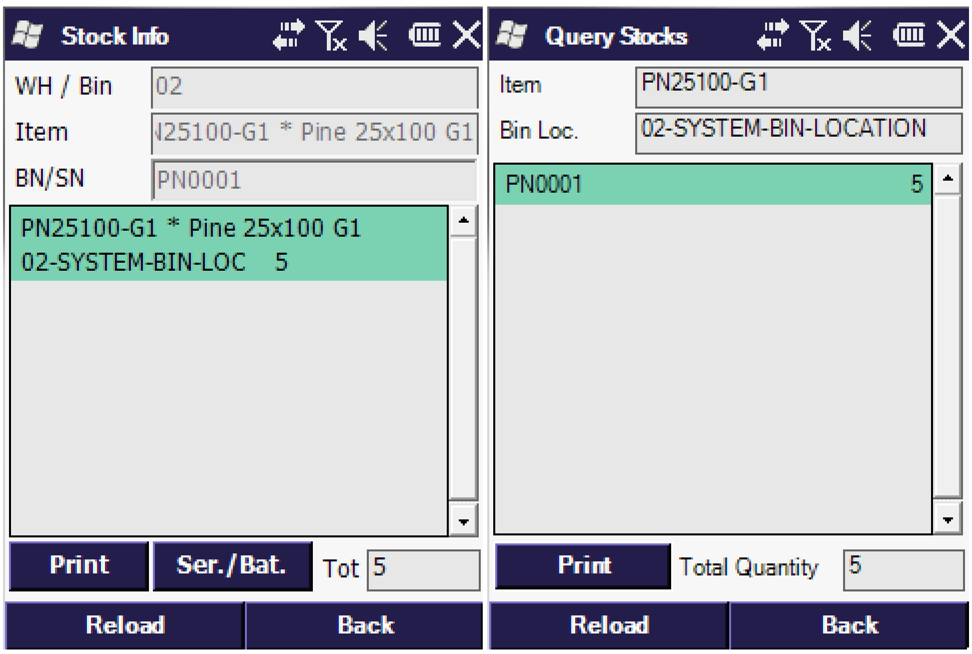
It is possible to scan a batch number not allocated for the sales order. In this case the stock with the scanned batch number will be added to the sales order.

Information displayed on the screen:

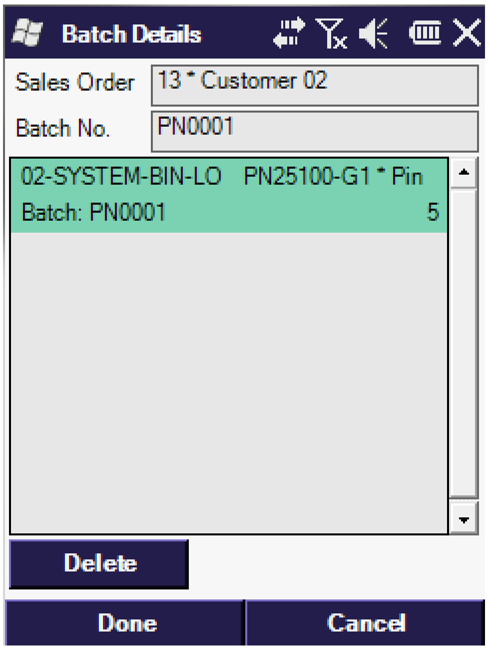
1. Document line number
2. Item code*Item name
3. Bin location
4. Batch number
5. Picked quantity
6. Picked quantity/Ordered quantity



Press the 'Find Stocks' button to open the 'Stock Info' screen. On this screen the warehouse, the item code and the batch number is displayed. Press the 'Ser./Bat.' button to see the batch number. Press the 'Print' button to print the item label. For more information about printing please see: Print labels

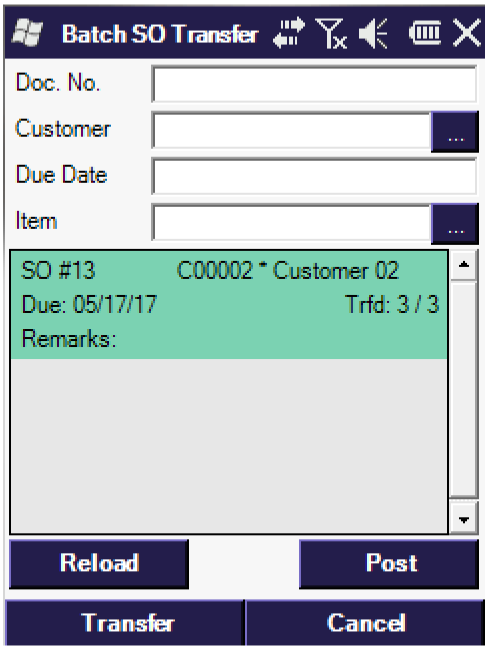


Press the 'Details' button to see the details of the selected stock. The 'Batch Details' screen will open.



Press the ‘Delete’ button to unpick the selected stock.

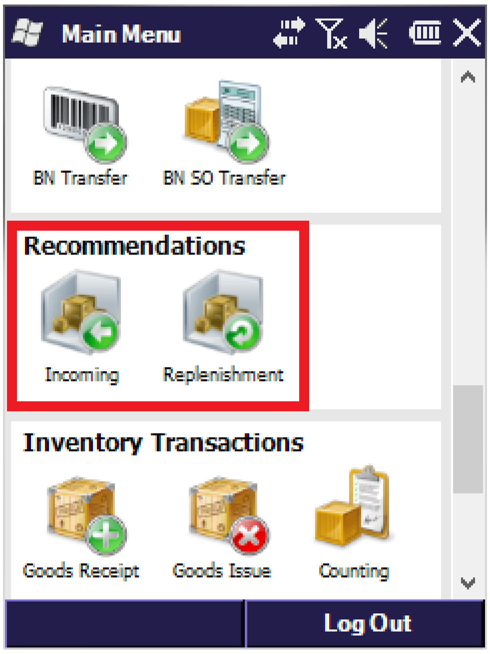
- If the stock line is from the original sales order, the stock line will remain on the screen and the picked quantity will be set to zero.
- If the stock line is added by scanning a batch, it will be removed from the screen and will not be added to the sales order.



Scan the next batch number or press 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 then press the ‘Post’ button. An *Inventory Transfer* document will be created in SAP Business One.

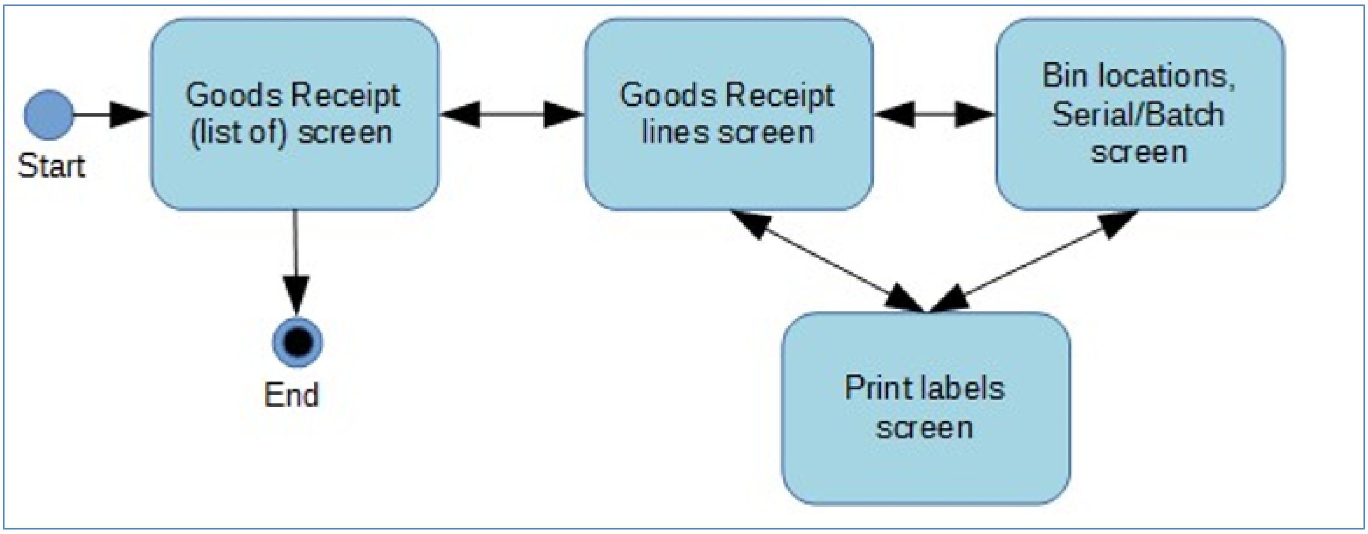
6. Recommendations

For further information about this topic, please see the documentation: Strategies in Produmex Scan.

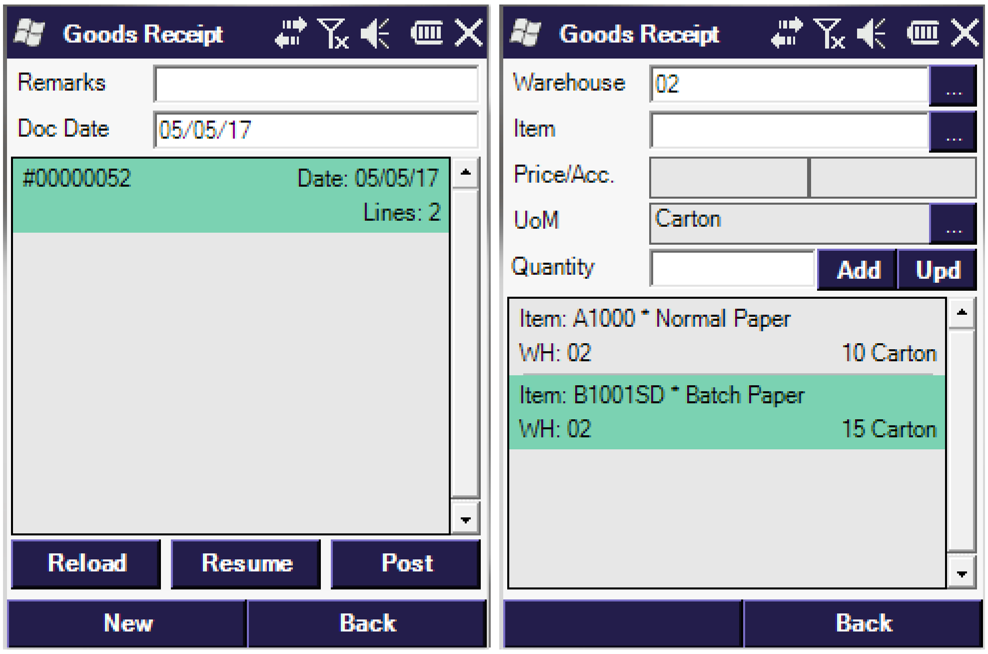


7. Inventory Transactions

7.1. Goods Receipt



Select the Goods Receipt option in the Main Menu under the Inventory Transactions section. Support the SAP Goods Receipt document on the mobile device. Allow to input: comment, have a separate main menu item. Support batches, serial numbers, location.



On the Good Receipt (lines) screen it is possible to add new items for the to-be-created Goods Receipt. You have to select the Warehouse (default: empty, or last warehouse in the same document), then select an item (scan item code or barcode).
If there are multiple UoMs for the item, you can select a different UoM than the default. Default: inventory/base UoM.
If the warehouse is non-bin warehouse (and item is not serial/batch), a quantity must be entered and Add/Upd button can be used to add or update the item with the quantity.
If the warehouse is using bin locations, or the item is serial/batch, the bin locations and the serial/batch has to be defined in the next screen.

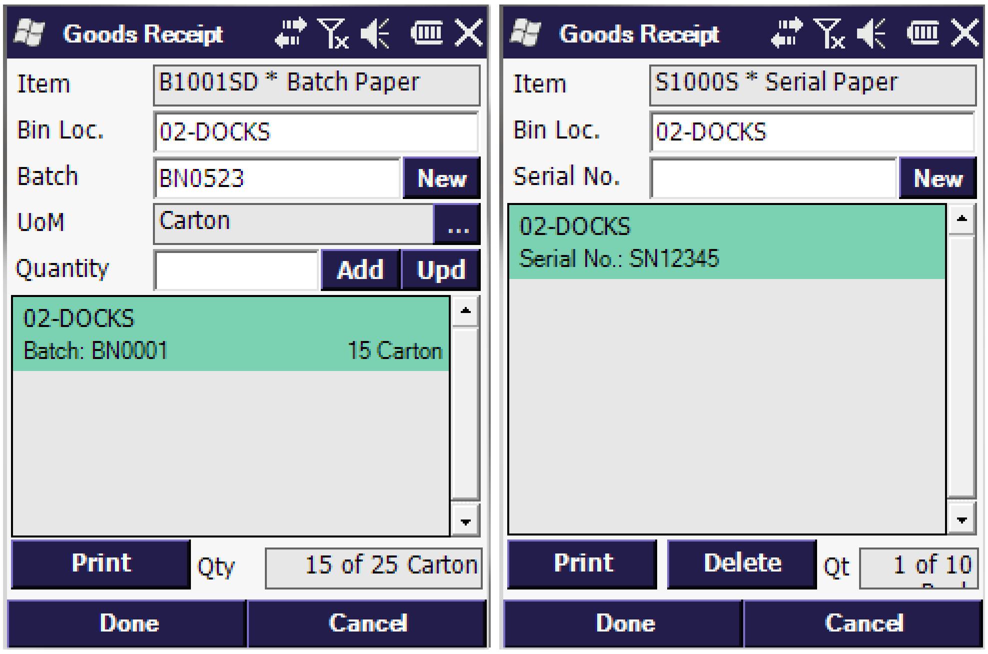
*Price/Account: a user query has to be defined with the name *bxmobilewh9_goodsreceipt_pricing*.

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

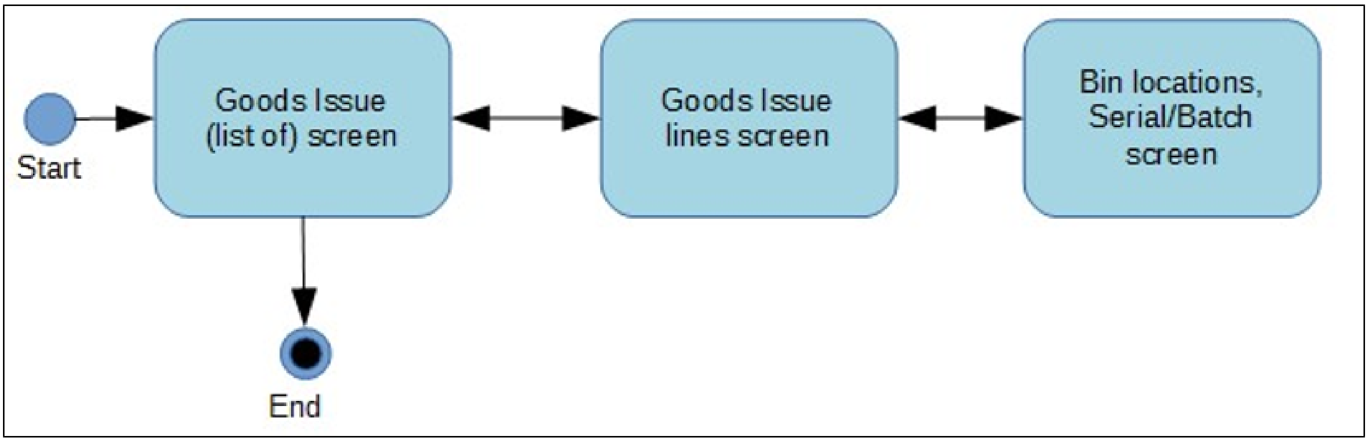
Example query:

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

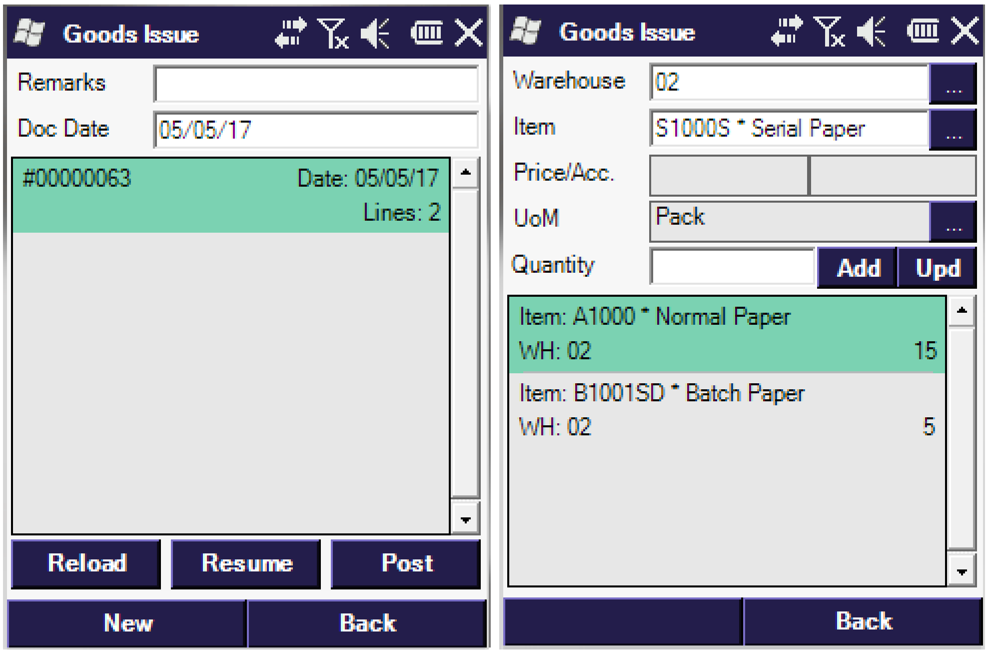
On the Good Receipt – bin, serial/batches screen, it is possible to define bin locations and quantities for the items. If the item is batch numbered, batch and quantity has to be entered, for serial type items, serial number have to be entered. If warehouse is non-bin warehouse, the bin location field will not be visible.



7.2. Goods Issue



The SAP Goods Issue document is supported on the mobile device.



It is allowed to input: comment, it has a separate main menu item. Support batches, serial numbers, location.
On the Goods Issue (list) screen you can start creating a new Goods Issue document by pressing the New button. (If you fill the Remarks and change the Doc Date it will be used in the new Goods Issue.) This will take you to the Goods Issue (lines) screen, where you can add items.
After the items have been added, you can create the Goods Issue document in SBO with the Post button. It is also possible to resume an earlier started work with the Resume button.

On the Good Issue (lines) screen it is possible to add new items for the to-be-created Goods Issue. You have to select the Warehouse (default: empty, or last warehouse in the same document), then select an item (scan item code or barcode).
If there are multiple UoMs for the item, you can select a different UoM than the default. Default: inventory/base uom.
If the warehouse is non-bin warehouse (and item is not serial/batch), a quantity must be entered and Add/Upd button can be used to add or update the item with the quantity.
If the warehouse is using bin locations, or the item is serial/batch, the bin locations and the serial/batch has to be defined in the next screen.

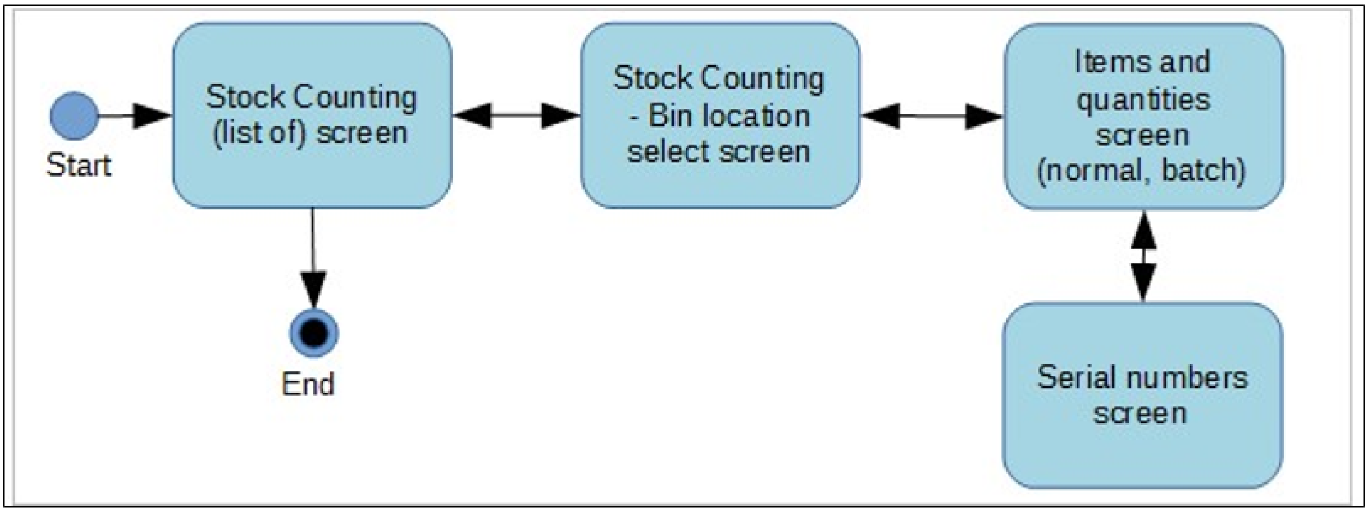
*Price/Account: a user query has to be defined with the name *bxmobilewh9_goodsissue_pricing*.

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

Example query:

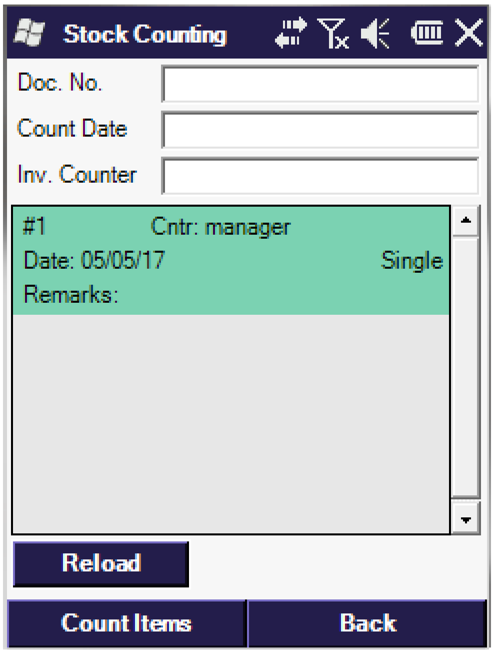
```
 SELECT OITM.AVGPrice as BXITPRC. '$' as BXITCURR FROM OITM WHERE
ItemCode=[%3]
```

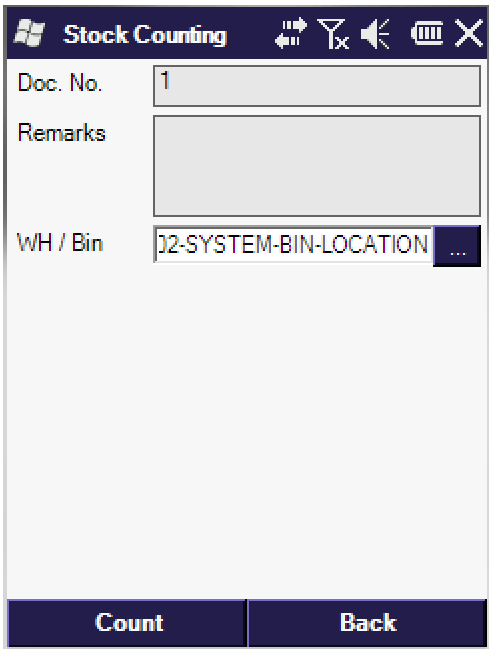
7.3. Stock counting



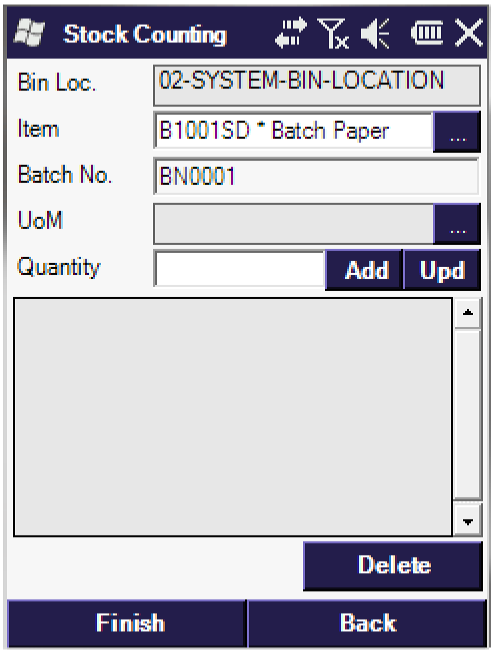
First you have to create the inventory counting documents in SAP BO that you want to process. Then you can start the stock counting application on the mobile device. Here you have to select the inventory counting document that you want to handle:

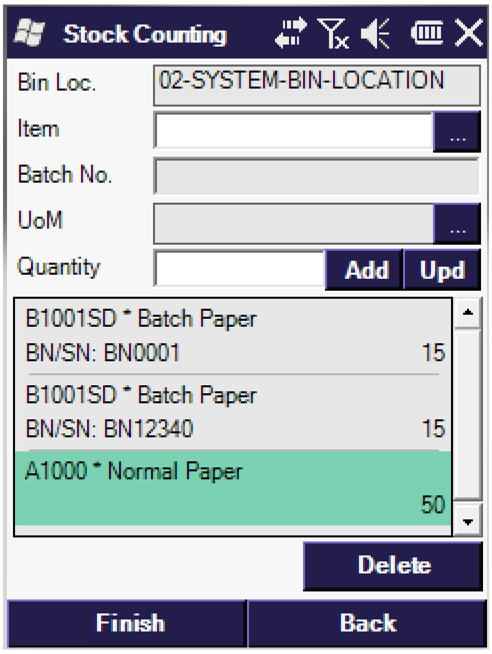
You can filter according to inventory counting document number, count date and inventory counter user/employee. Tap Reload to load the relevant documents, then select one of them and tap 1st Count.



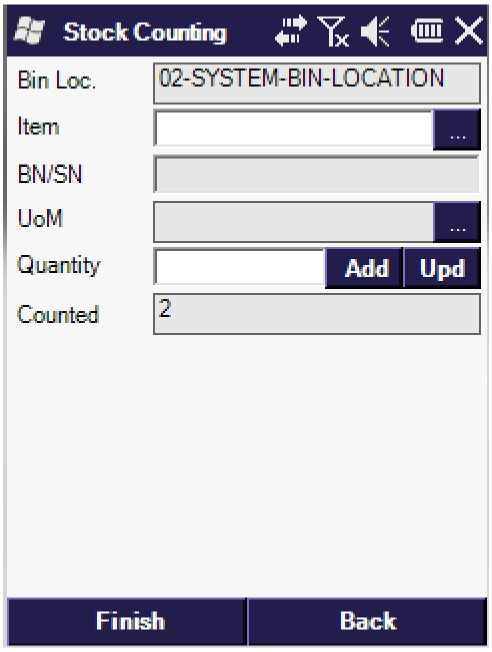


On the next screen you can enter the bin location code you want to count, or the warehouse code if there are no bins in that warehouse, and then tap Count (if you tap Back, you get to the previous screen):
Then you have to enter the item code and the quantity you counted (the batch/serial number if needed), and then tap Add or Upd:

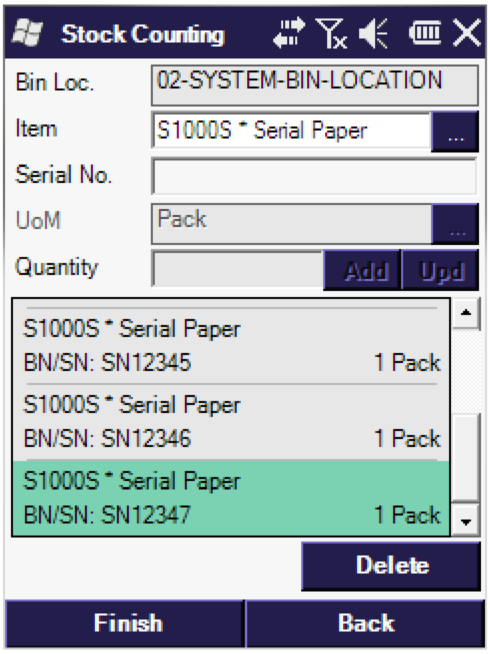




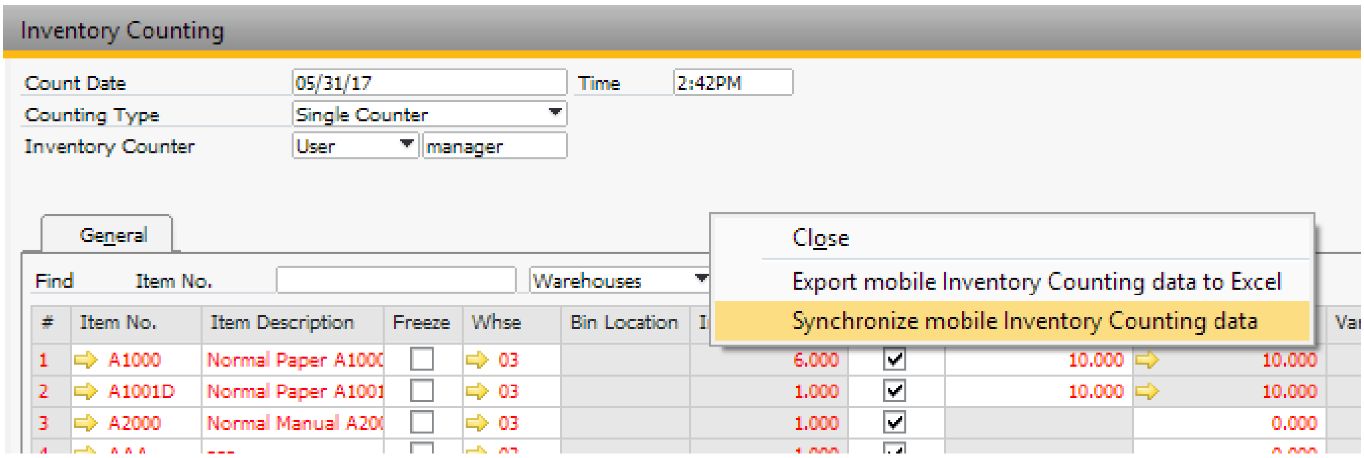
If the '*Show all Stock Counting data on scanners*' option is disabled on Produmex Scan General settings, only the number of the counting records is displayed on the screen.



You can keep on adding items and quantities until you are finished, the entered items and quantities are added to the grid, then tap Finish or Back to save your work. If you tap Finish, it means you are finished with counting the stock data on this bin location, and what is not counted (not in your list) will be set to 0 (so the existing stock that is not counted will be deleted). If you tap Back, it means you are done with the inventory; the non-counted items remain as they are.



If the '*Real-time Stock Counting*' option is disabled on Produmex Scan General settings, the counting result will be stored in a user table. Synchronize the Inventory counting document in order to update it with the counting results. Synchronization can be initiated from right click menu on the SAP document.

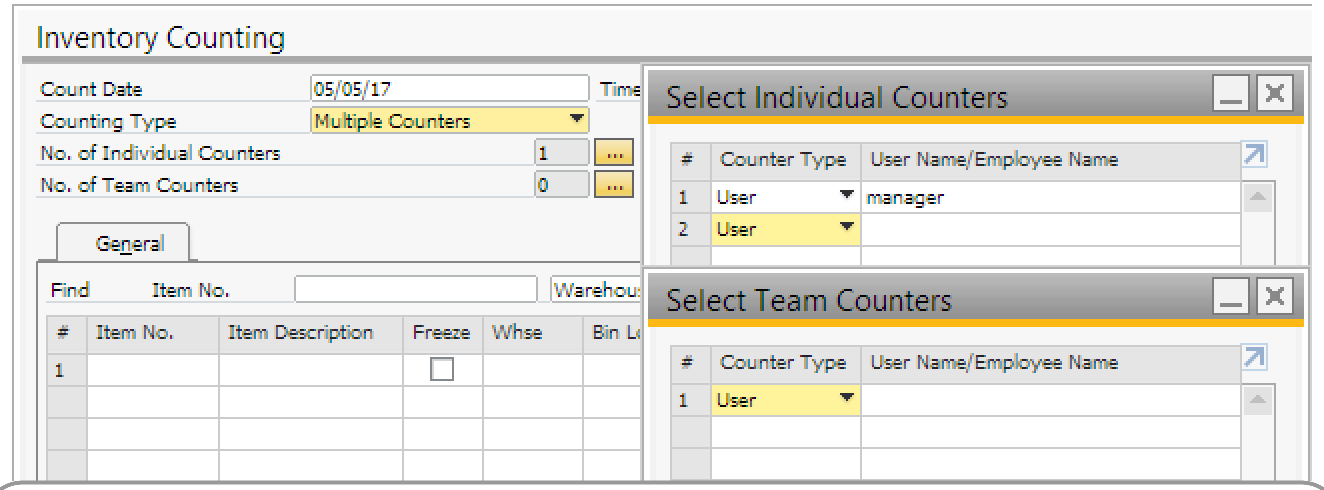


Multiple Counters

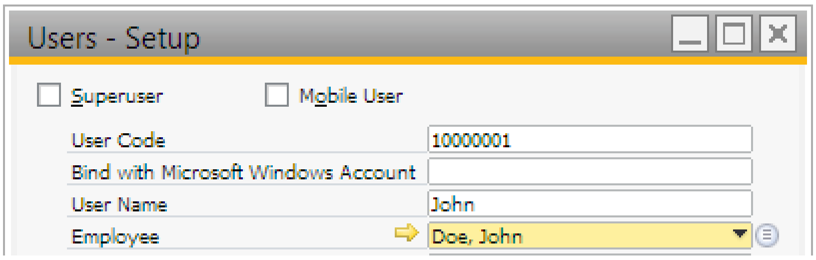
Produmex Scan supports multiple counters' inventory counting scenarios as well. Depending on SAP BO document settings, you are able to do:

- Individual counting where individual counters conduct independent counting of an item at a storage location. You can select a maximum of 5 individual counters.
- Team counting where a group of counters' counting results of an item at a storage location add up to its total quantity. You can select a maximum of 10 team counters.

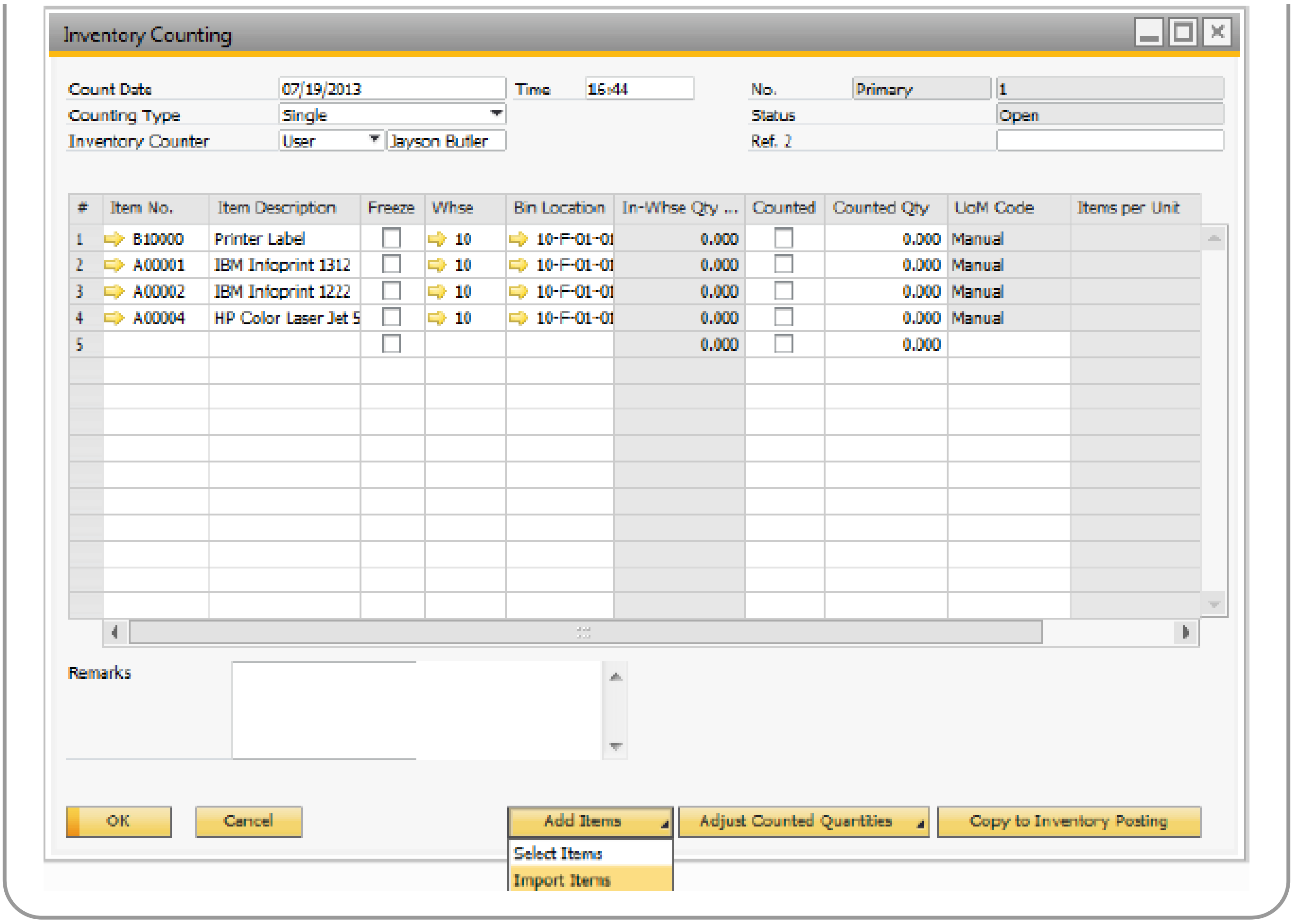
Before you start with the counting, in the inventory counting document you have to select the counting type and you have to add the users names to this document.



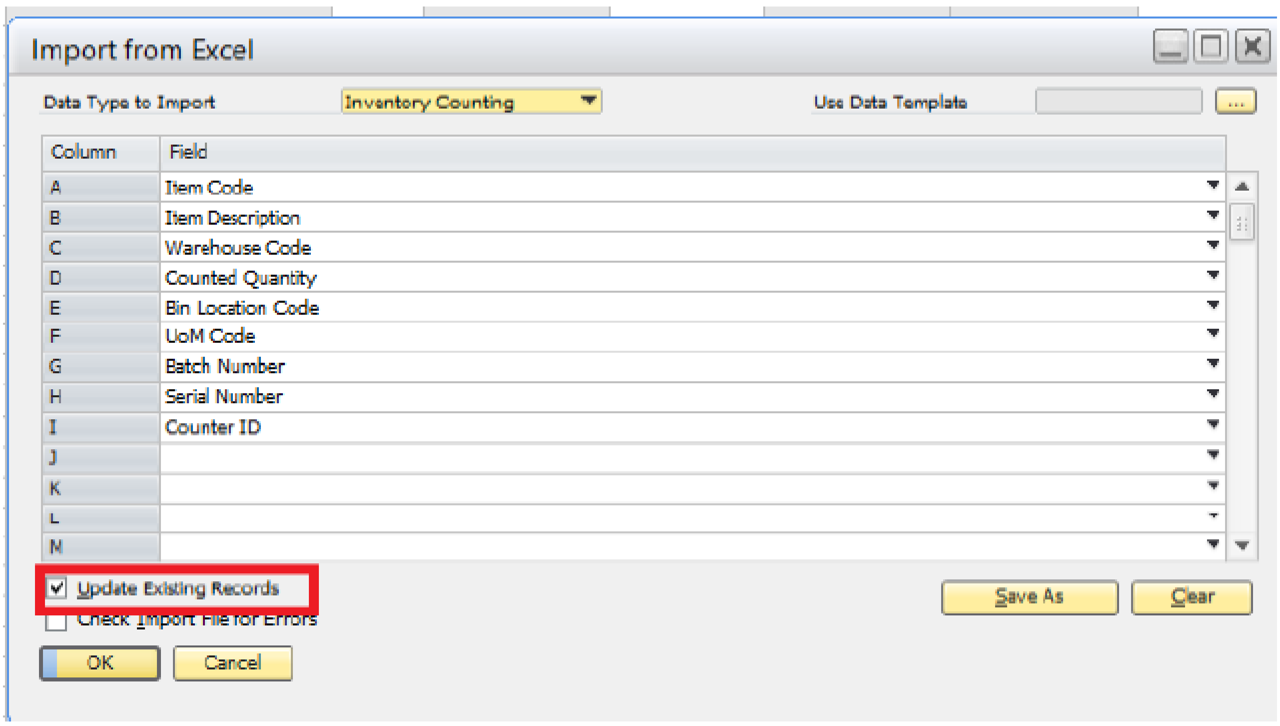
SAP Business One Note:
When selecting counters from the list of employees, you will see only employees that are not SAP Business One users; in other words, if an employee is also defined as an SAP Business One user, you can see this employee only in the list of users.
Ensure that in the users–setup for, the name of the employee (counter) is selected in the employee field. Check this set following this path: Administration>Setup>General>Users

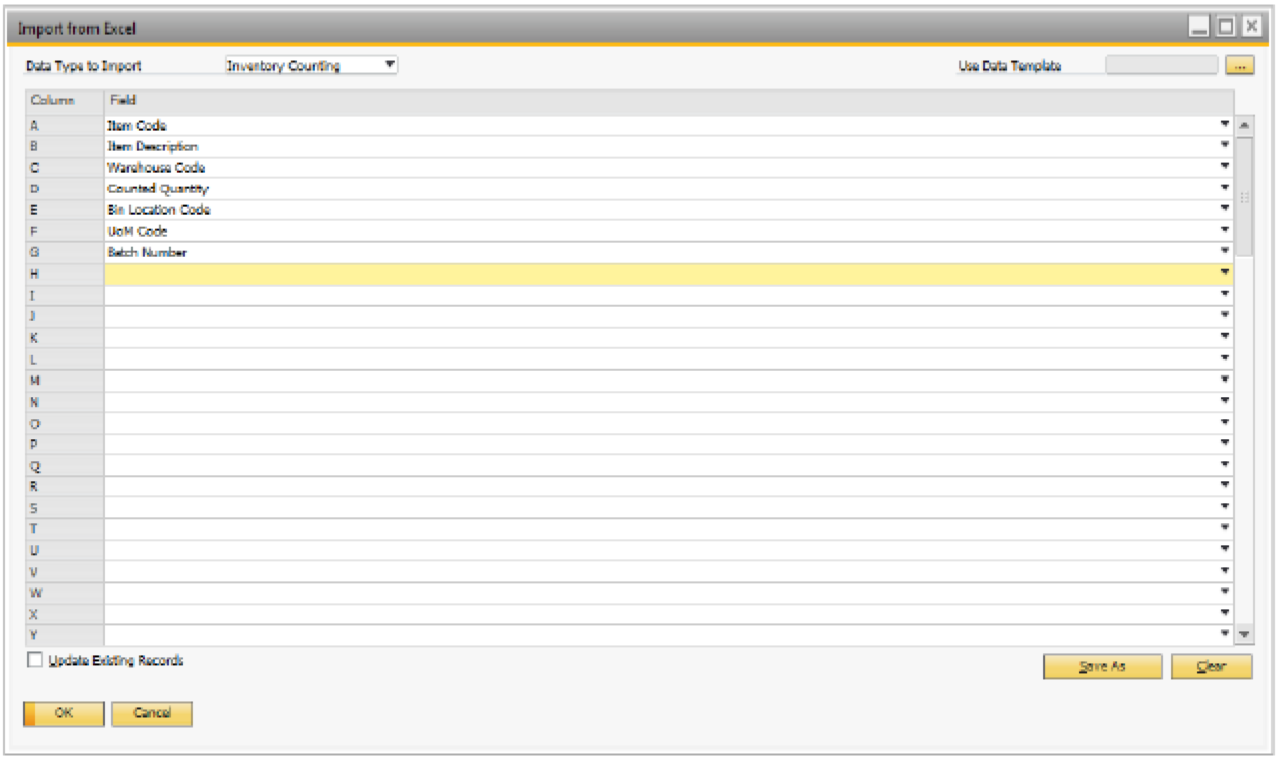


If you work with SAP BO 9.1 the inventory counting will be updated in a real-time. By the other hand, if you work with SAP BO 9.0, the stock data you entered will be saved in a user table of the Produmex Scan add-on that you can export to an excel file. To do that you have to open the Inventory Counting document, right click on an empty area and select Export mobile inventory counting data to excel. It will create two separate files: one for normal and batch items and one for serial numbered items (it means you have to specify two files). Then you have to start Add Items>Import Items:

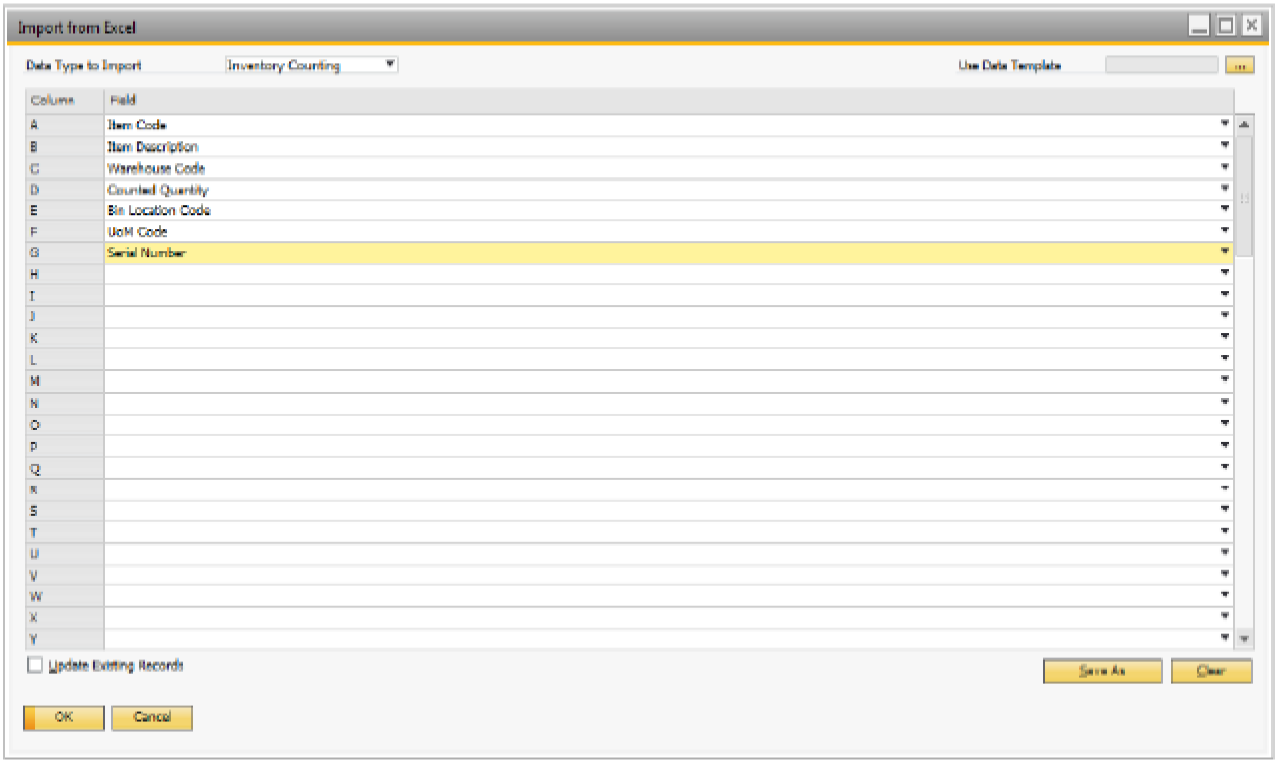


After that you have to define the structure of the file from which you import. It should be like this for the batch and normal file:

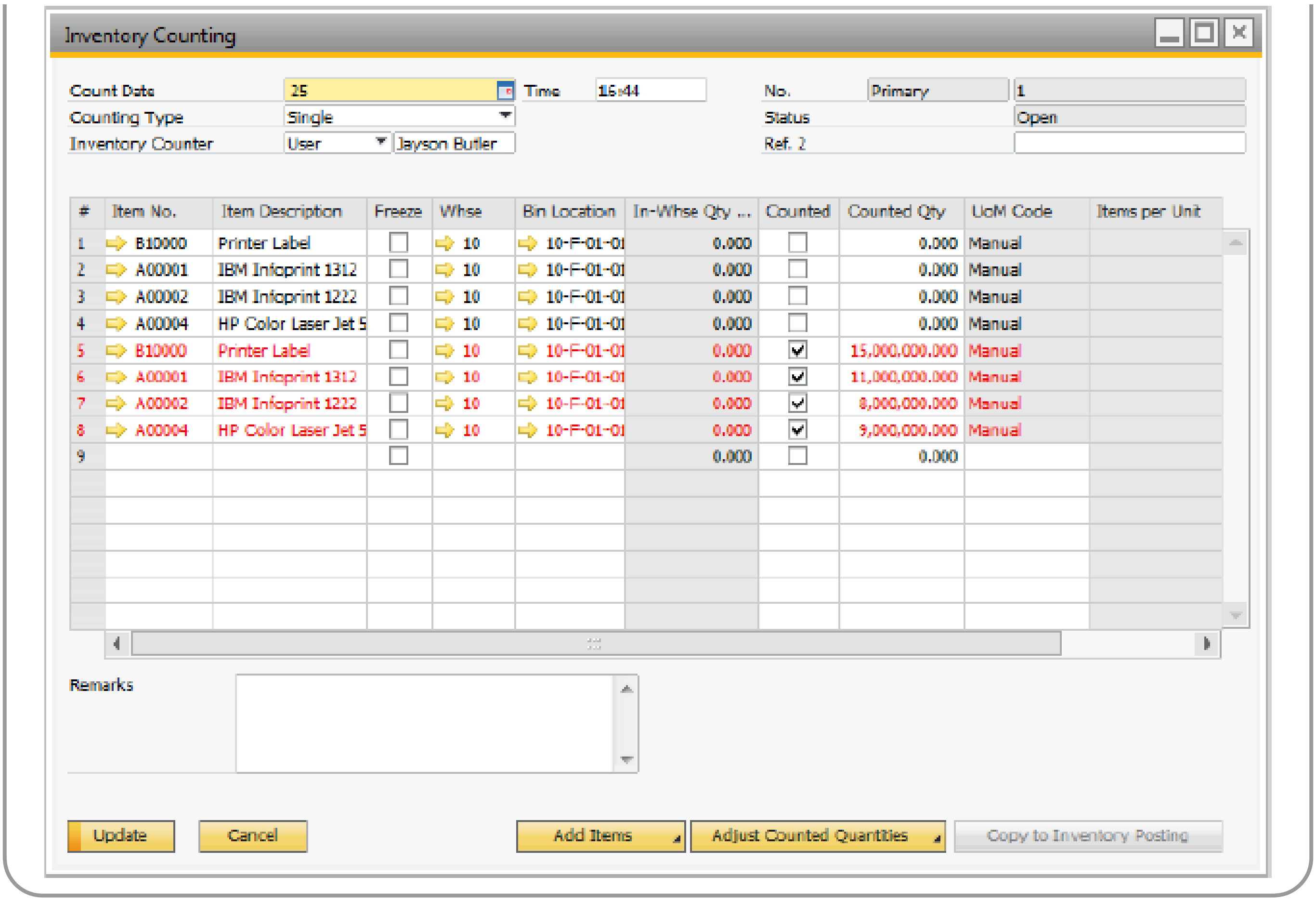




and for the serial numbers file:

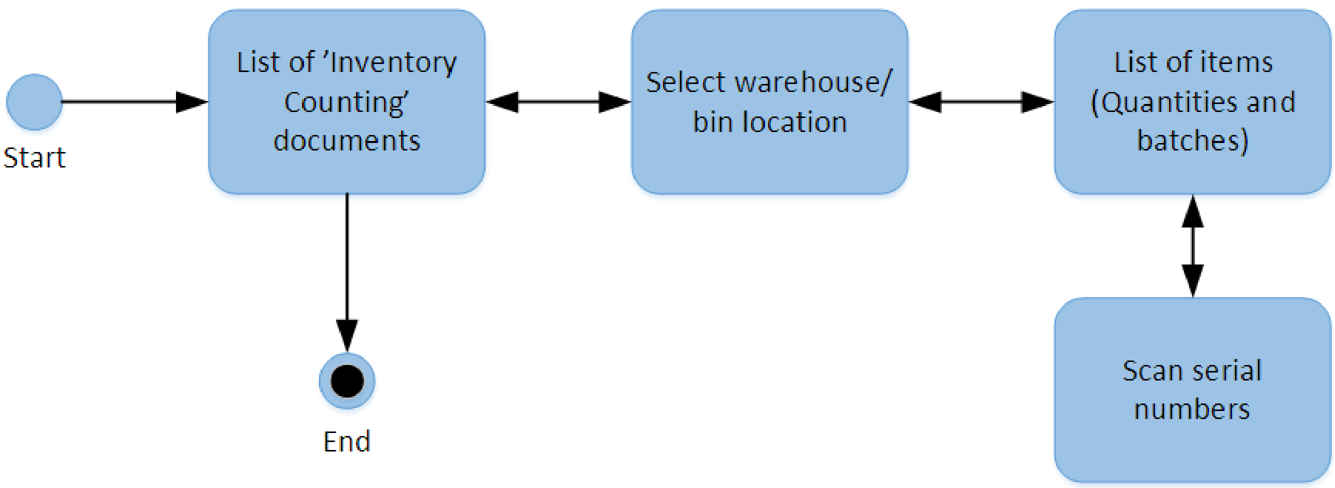


We recommend that you save the template with Save As for later use. You have to specify the file that was created by the add-on for SAP BO, and then it will be imported.



Note:
You have to update the inventory counting document. You cannot have the same item on the same bin location twice in the inventory posting document. So if you reimport your inventory counting, it is advisable to delete the existing lines. You have to import both files generated by the add-on.

7.4. Quick counting



The Quick Counting can be performed based on an *Inventory Counting* document. Unlike in Counting, the current inventory status of the selected location/warehouse is listed on the screen during the counting.

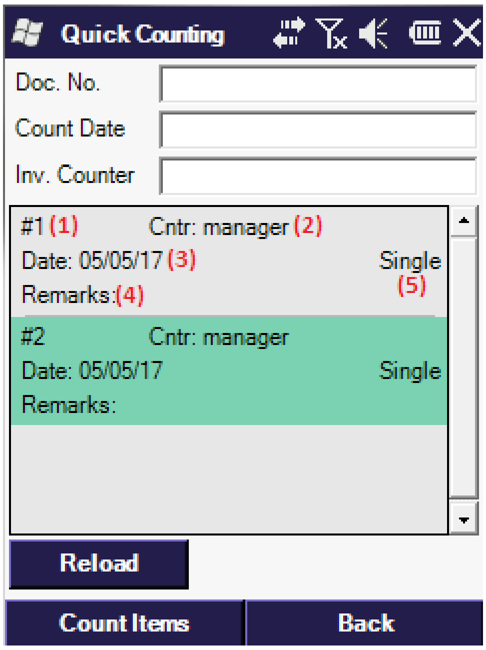
Press the ‘Reload’ button to load the *Inventory Counting* documents. Every open *Inventory Counting* document is listed. It is possible to filter the documents with the following:

- Doc. No.: Filter the list to the document with the selected Doc.No. only.
- Count Date: Filter the documents based on the Count Date.
- Inv. Counter: Filter the documents based on the appointed counter.

Displayed information:

1. Document Number
2. Counter
3. Count Date
4. Remarks from the Inventory Counting document
5. Counting type

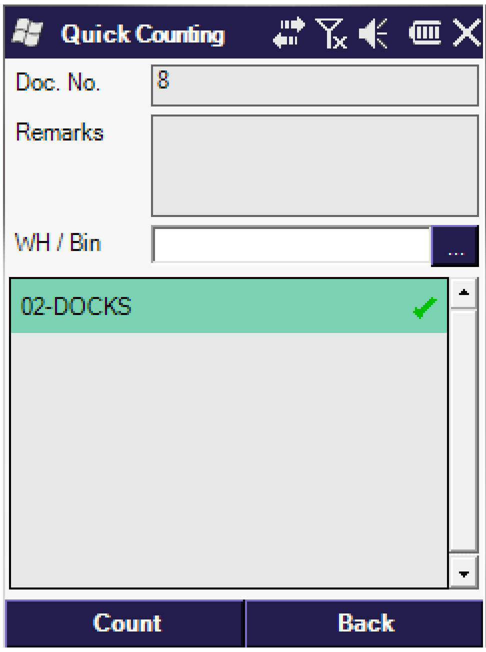
Select the *Inventory counting* document and press the ‘Count Items’ button.

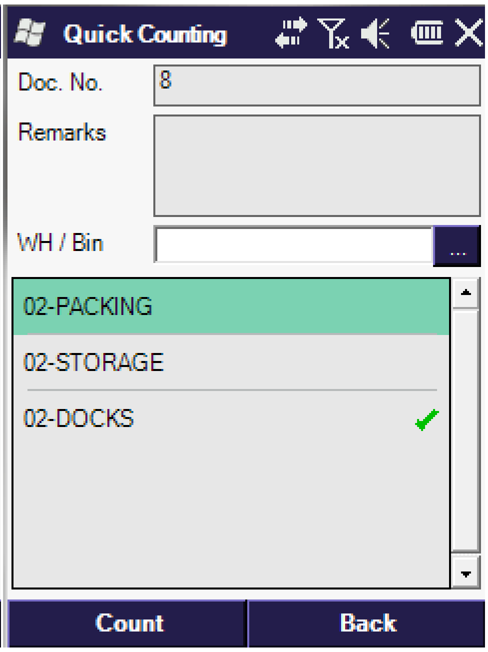


On the next screen add the bin location to the *WH/Bin* field. If the warehouse to count does not have bin locations, add the warehouse to the field. To select the warehouse from a list, press the ‘…’ button. *Please note: Only non bin managed warehouses can be selected from the list.*

Already counted bin locations and warehouses are listed on the grid.

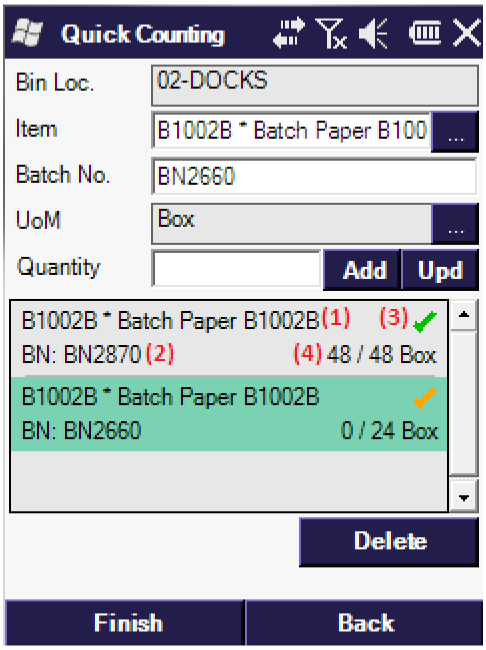
If the *’Display all sheet bin locations for Quick Counting’* option is enabled on the Produmex Scan General tab, every bin location from the *Inventory counting* document is listed on this screen. The already counted locations are marked with a green check mark.

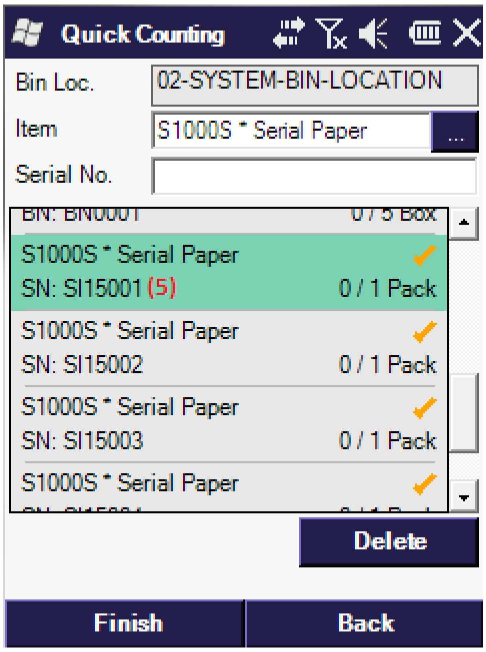




On the next screen every item from the location/warehouse is listed with the on stock quantity. Items with different batch or serial number are listed on separate lines.

1. Item Code * Item Description
2. Batch number
3. Status:
   - Green check mark: completely packed
   - Orange check mark: not packed/partially packed
4. Counted quantity/Quantity on stock UoM
5. Serial number





Scan the item then specify the UoM and the batch number. Enter the quantity to the *Quantity* field. To increase the current value with the entered value, press the 'Add' button. To replace the current value with the entered value, press the 'Upd.' button. To remove the added quantity, press the 'Delete' button.

Serial numbered items can be counted by scanning the serial numbers.

Press the 'Finish' button to finish the counting.

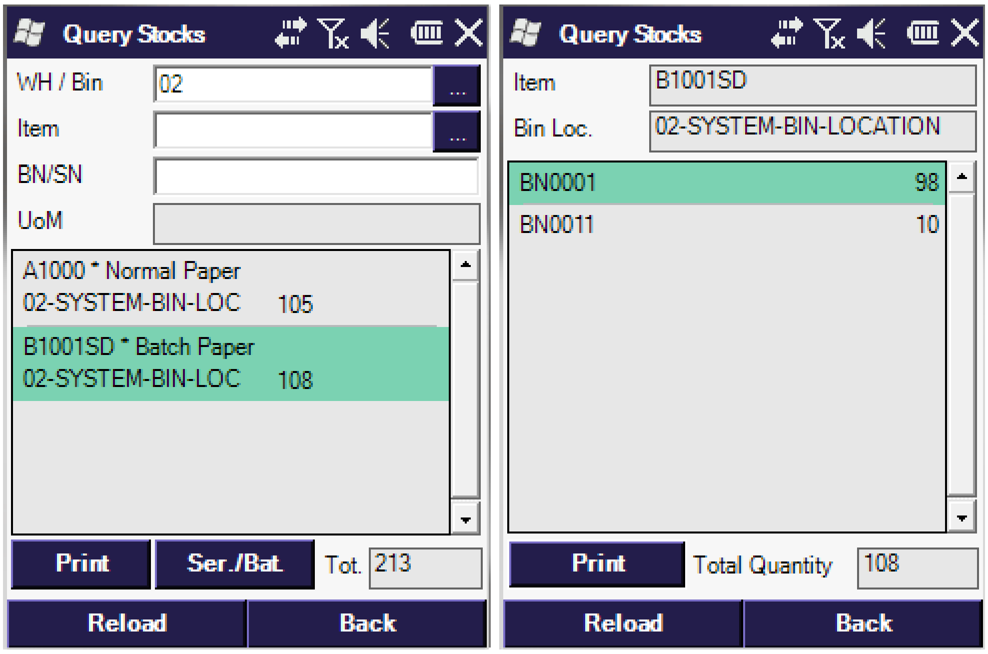
Press the 'Back' button to go back.

To export the results of the mobile counting to a text file, select the *'Export mobile inventory counting data to Excel'* option from the right-click menu on the Inventory Counting document.

8. Other

8.1. Query Stocks

You can get stock information with the function Query Stocks. You can filter according to Warehouse, Bin location, Item code and Batch/Serial Number.

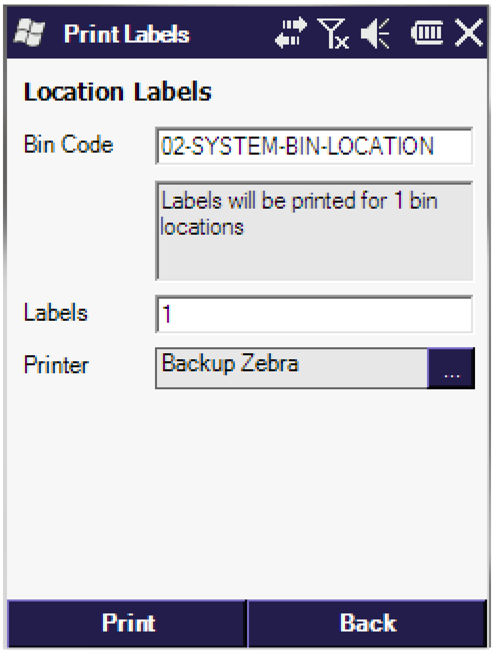


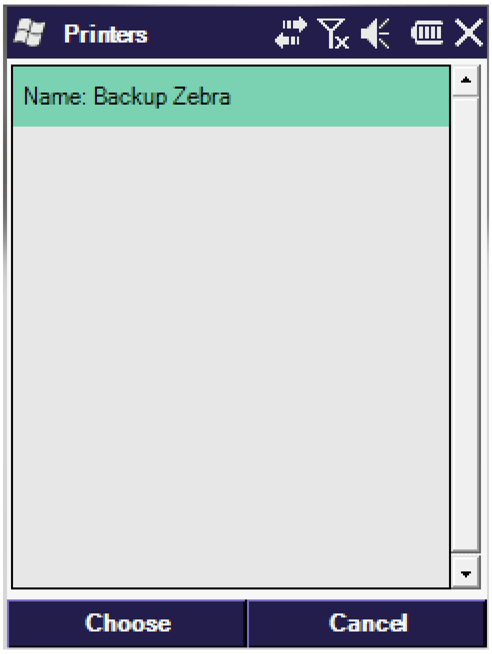
After setting the filters tap Reload and the grid will be populated with the stock data found based on the criteria. The Tot. field shows the total quantity of the queried stock data. With Print you can print the stock labels for the selected items/batches.
If you select a line in the grid and tap Ser./Bat. button, you will get a list of the serial/batch numbers belonging to the selected line.

If you tap Reload, the data will be refreshed. If you tap Back, the query stock filter form shows up again.

8.2. 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):





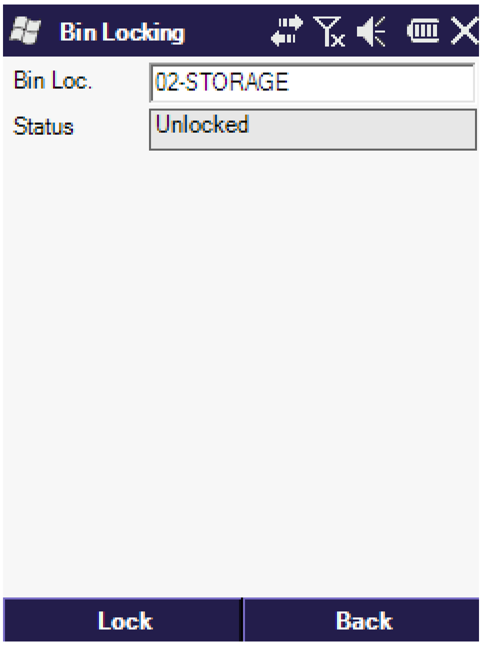
Tap Print to print the labels, tap Back to go back to the main menu. You can choose the printer to print by tapping … beside the Printer field.

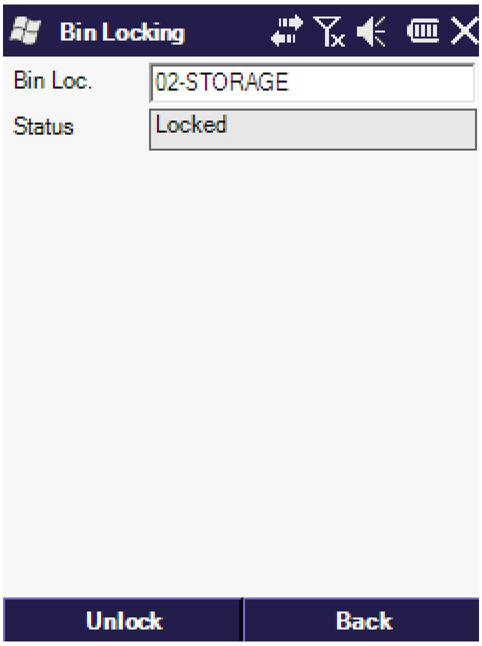
Select the printer you want to use and tap Choose to use it or tap Cancel to close the printer selection screen without changing the assigned printer.

8.3. Bin Locking

To lock a storage location, press the ‘Bin Locking’ button.

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

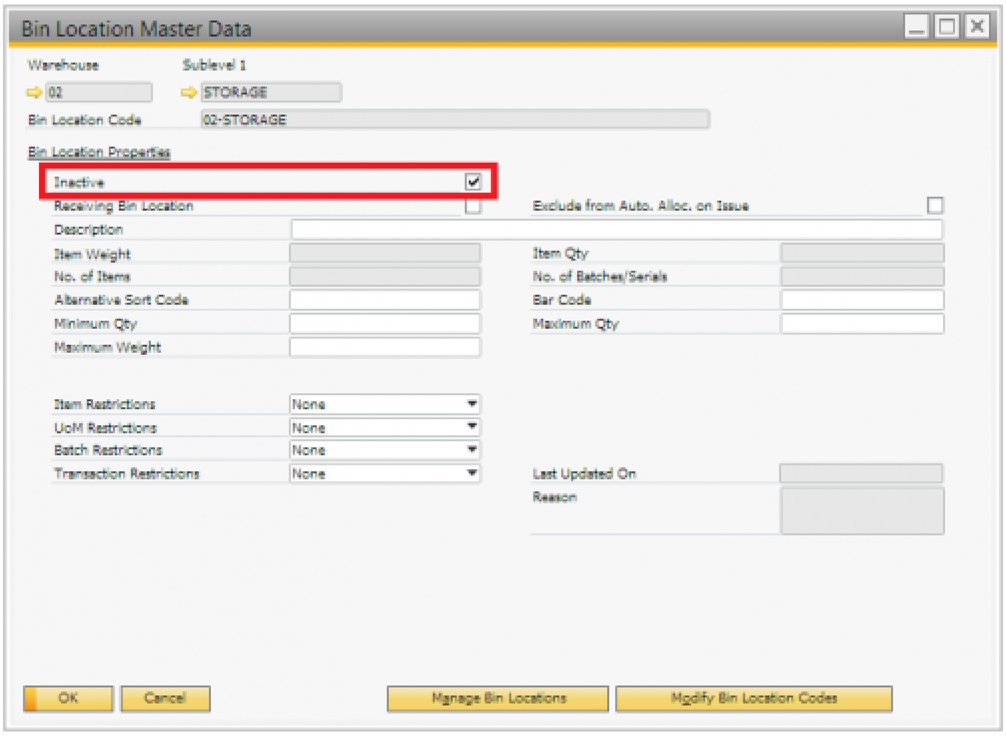




Press the 'Unlock' button to unlock the bin location.

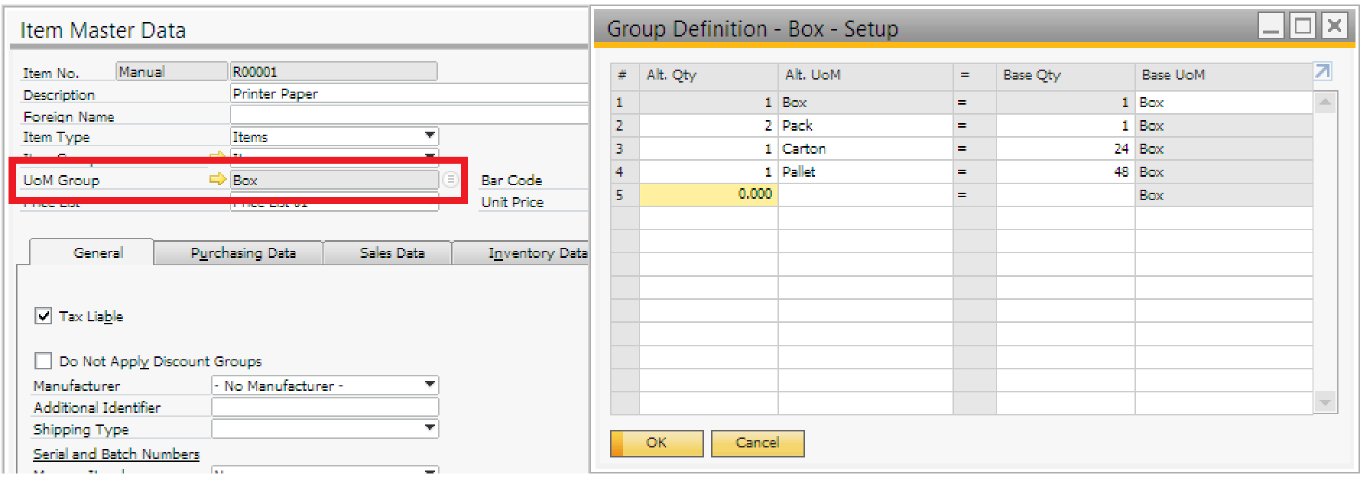
Press the 'Lock' button to lock the bin location. A bin location cannot be locked if there are open inventory counting documents or the bin location contains positive/negative inventory.

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



9. 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.



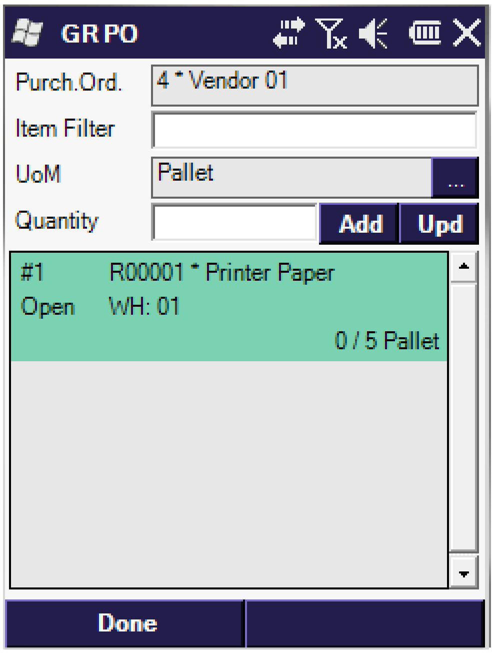
When dealing with an item with a pre-defined UoM group, the user will be able to select any applicable UoM in the Warehouse system. All quantities in the Warehouse system will be handled in the UoM specified and will be booked to SAP BO in the UoM defined in the Item Master Data's relevant setting.

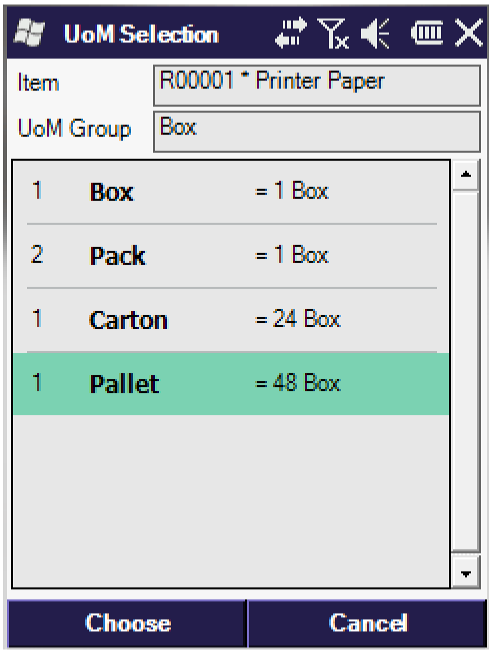
9.1 Example: Goods Receipt

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.

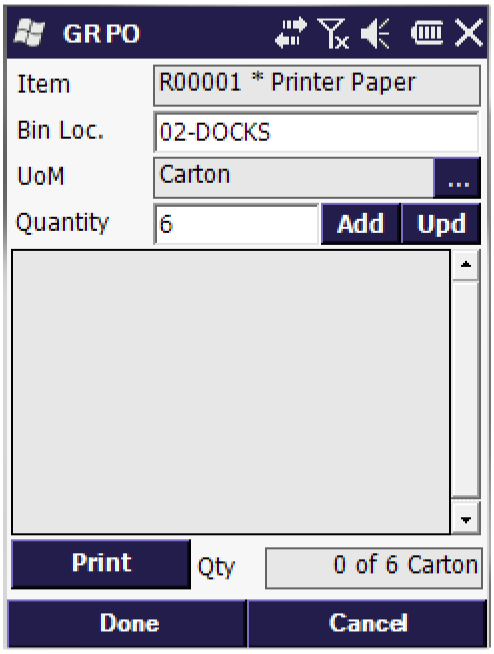
Tapping the options button in line with the UoM field opens up the options for UoMs. These were defined in SAP BO, with the UoM Group. In this example 'box' is the base quantity. A 'box' can be divided into two 'packs' or 24 'boxes' can be combined into one 'carton', etc.

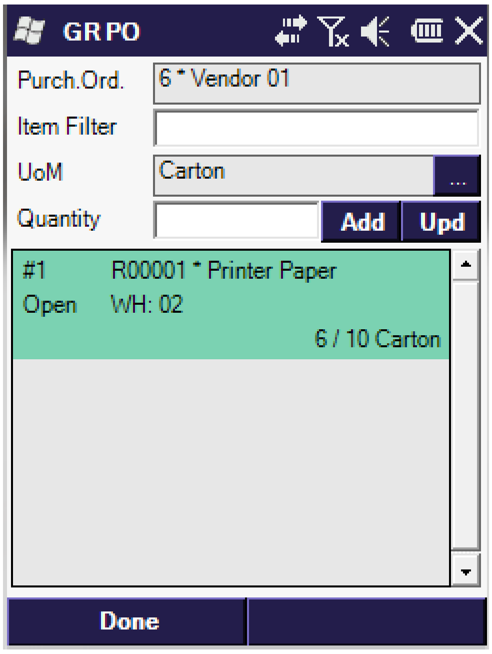




In this example the ‘carton’ was chosen. Next 6 ‘cartons’ will be added to the goods receipt. The bin location will be specified.

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.

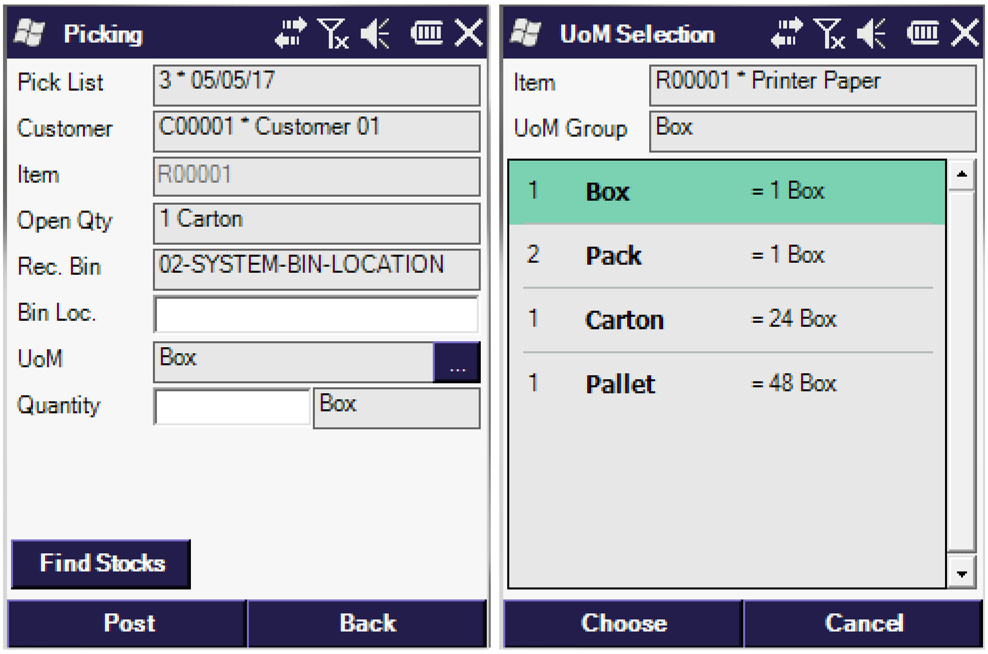




Further in this example, if 10 ’boxes’ are added to the first order, the system will correctly calculate: The already reported quantity 6 ’cartons’ = 6*24 ’boxes’ = 144 ’boxes’. Adding 10 will give 154 ’boxes’.
The full order is 5 ’pallets’ = 5*48 ’boxes’ = 240 ’boxes’.
So 144/240 ’boxes’ can be read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

9.2 Example: Deliveries picking

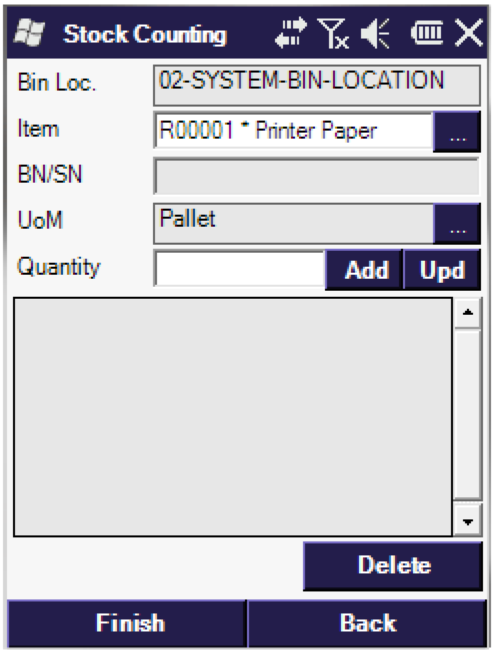
When picking for deliveries, the user can specify the quantities in the UoM of his choice. Tapping the options button in line with the UoM field opens up the options for UoMs.

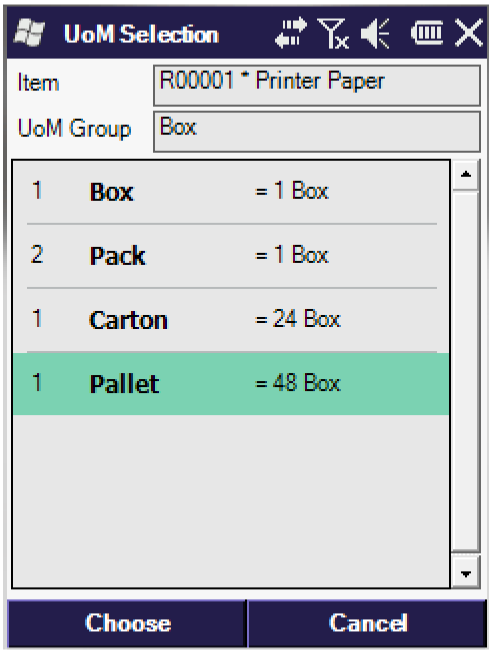


These were defined in SAP BO, with the UoM Group. In this example ‘box’ is the base quantity. For example one ‘box’ is worth 2 ‘packs’. In this example ‘box’ was chosen.
The logic is the same as before. Next to the quantity field the current UoM can be viewed.

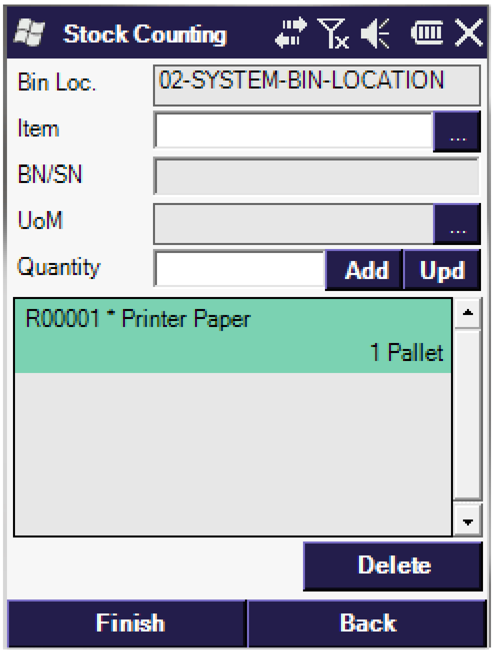
9.3 Example: Stock counting

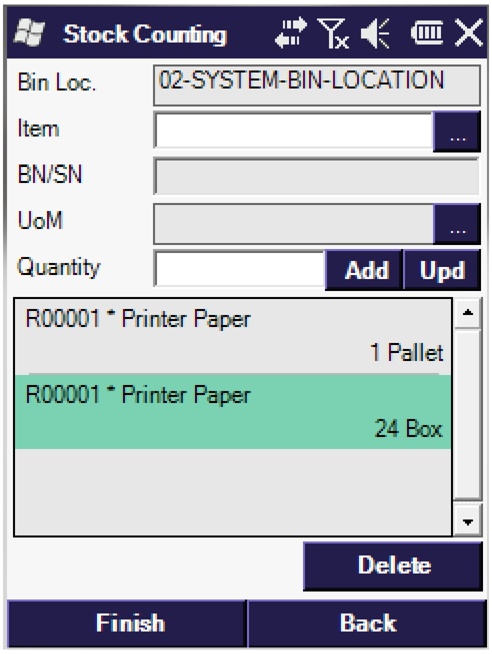
When counting stocks, the user can specify the quantities in the UoM of his choice. Tapping the options button in line with the UoM field opens up the options for UoMs. These were defined in SAP BO, with the UoM Group. In this example ‘box’ is the base quantity. For example one ‘pallet' is worth 48 ‘boxes’.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





10. Multiple Branches

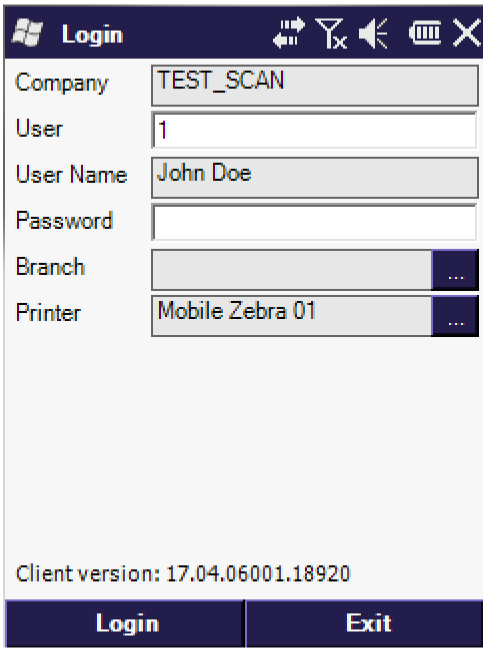
10.1. Setup

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.

10.2. On the mobile device

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

- If the employee is not assigned to a branch, specify the branch on this field. Press the ‘…’ button to select the branch from a list.
- If the employee is assigned to a branch this field is automatically populated.



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.

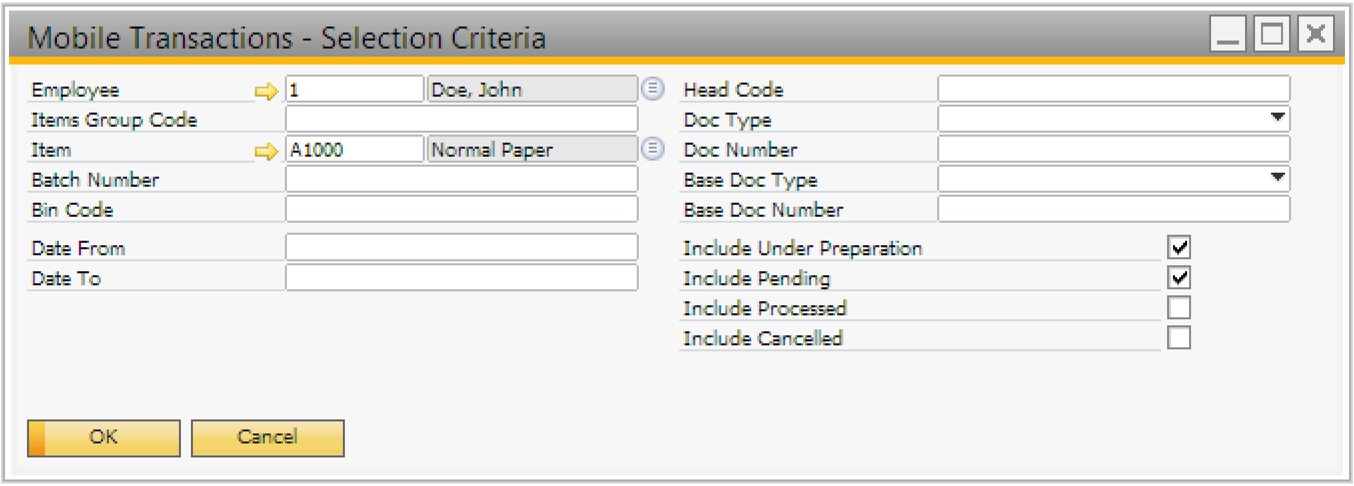
11. Administrative Functions

As described above when you create bookings in the mobile devices a so called mobile transaction data will be generated in the SAP BO company database to store your data before you tap Post. It is also possible to check these mobile transactions in the Produmex Scan add-on. You can even cancel or book them from SAP BO.

You can find the mobile transaction administration at Inventory>Inventory Transactions>Mobile Transactions. You have two menus here: Search Mobile Transactions and Mobile Transactions. With Search Mobile Transactions you can filter for them, with Mobile Transactions you can simply browse the existing transactions.

11.1. Search Mobile Transactions

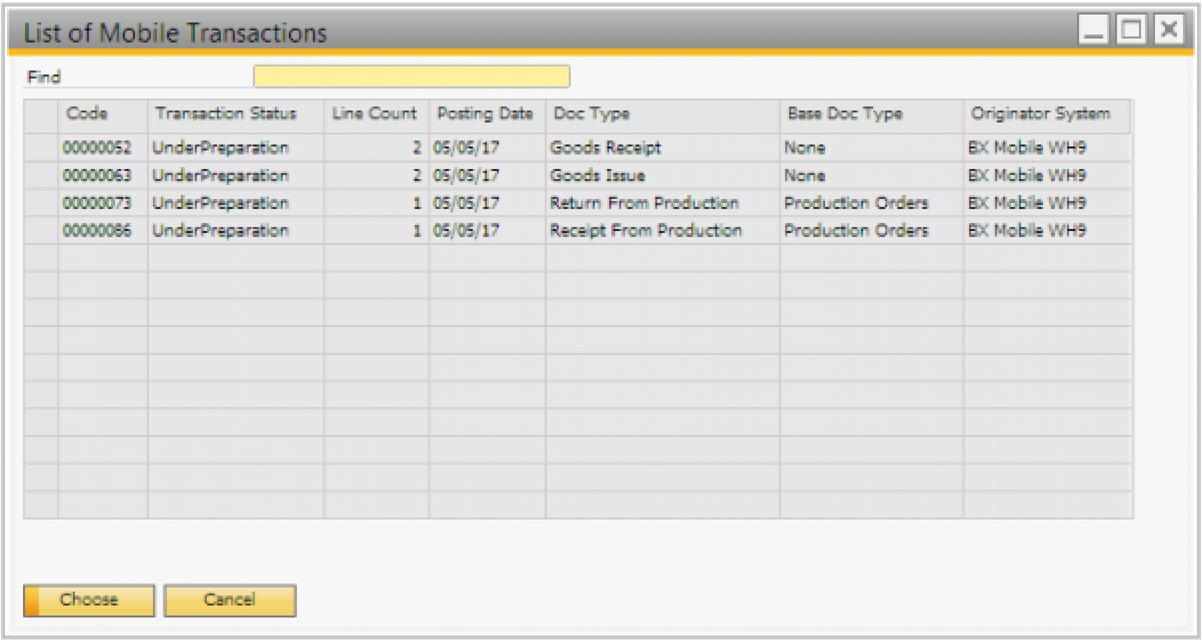
When you start the menu you will get a filter window which you can fill in according to your needs:



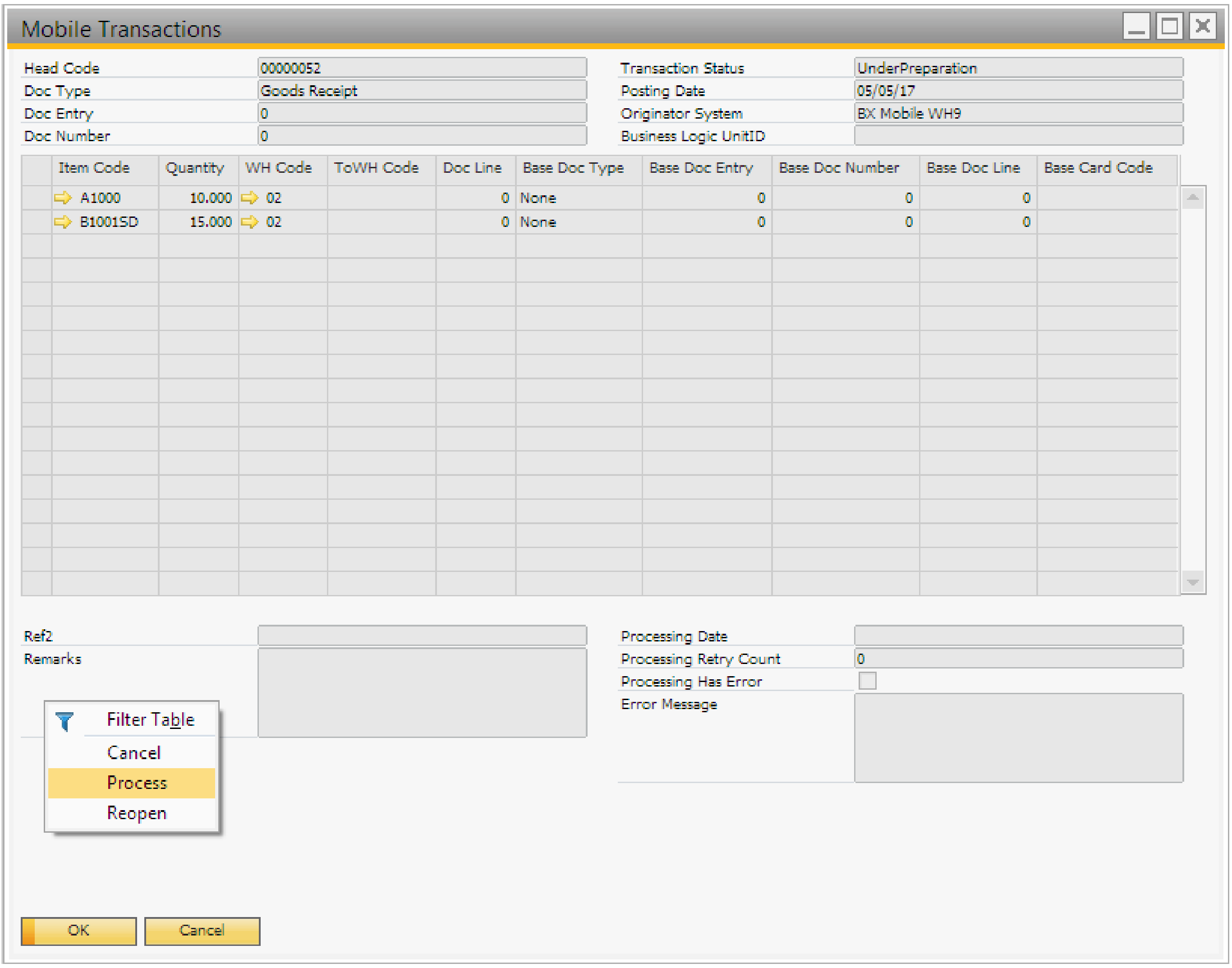
You can filter according to every master data that you can enter at a mobile transaction in the mobile device, and you can select among four statuses: Include Under Preparation, Include Pending, Include Processed and Include Cancelled.

- Include Under Preparation means that you want to see the mobile transaction data whose creation has been already started but no post booking happened (the SAP BO document has not been generated yet).
- Include Pending is for the mobile transaction data where the post already happened but because of a problem 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 will list all the mobile transaction data that are already processed (the SAP BO document has already been created).
- Include Cancelled will show you the mobile transaction data that have been cancelled.

After you filled out the form with the relevant data, click on button Update and the relevant mobile transaction data will be listed.



In the list of Mobile Transactions window you can choose the mobile transaction data which you want to open, double click the line and the mobile transaction will be opened:



Here if you right click an empty area you can choose Process or Cancel from the context menu. If you choose Process, the add-on will try to create the relevant SBO documents again, if you click Cancel, the mobile transaction data will be cancelled and you have to create the SBO documents manually based on the mobile transaction data (or you can make the document again from the mobile device).

11.2. Mobile Transactions

The window Mobile Transactions is exactly the same as the last window from above. Here you can browse the mobile transaction data with the arrow keys and if you found the one you were looking for you can cancel or process from the right click context menu.