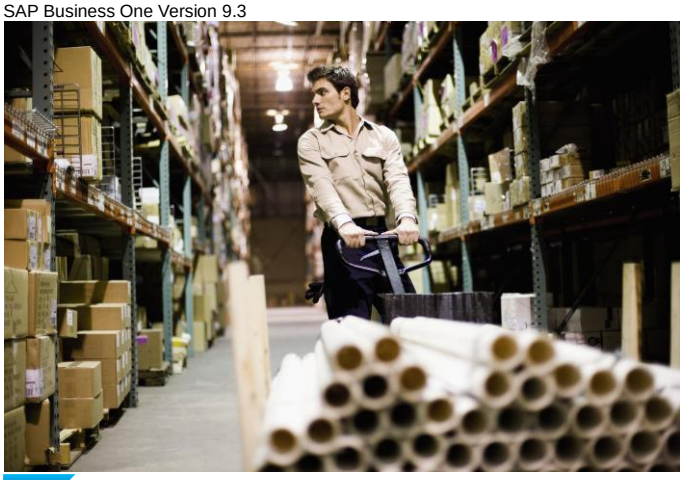
Picking Goods in the Sales Process

SAP Business One Version 9.3



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Welcome to the **Pick and Pack in the Sales Process** course topic.
In this training we will learn how to work with the *Pick Pack and Production Manager*, learn how to produce *Pick Lists* and go through a pick and pack sales process.

Objectives

At the end of this topic, you will be able to:

- Use the Pick Pack and production Manager in a sales process to create pick lists and sales documents.
- Generate pick lists directly from documents.

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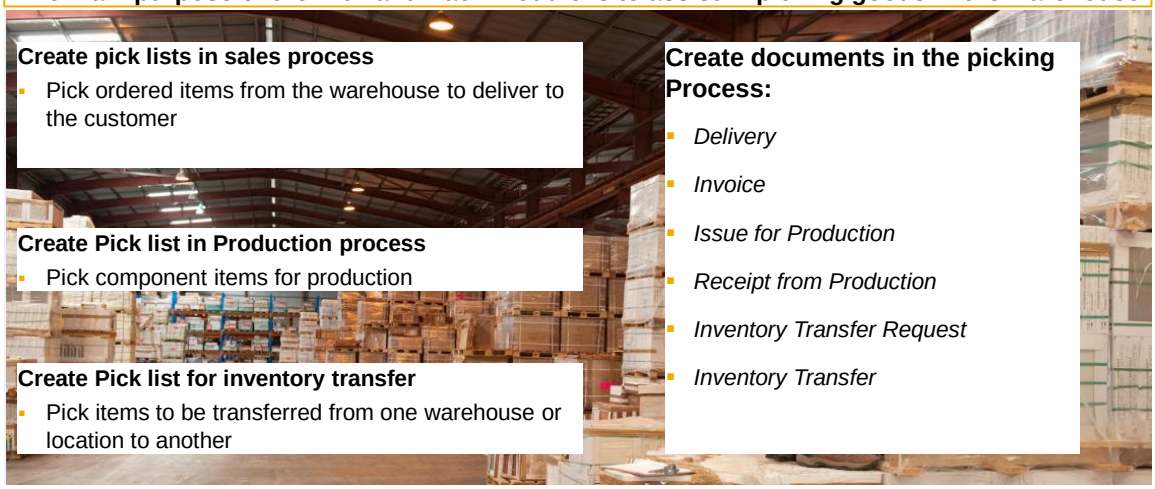
After completing this topic, you will be able to:

- Use the Pick and Pack Manager in a sales process to create pick lists and sales documents.
- Generate pick lists directly from documents.

Introducing the Pick and Pack Module

The main purpose of the Pick and Pack module is to assist in picking goods in the warehouse



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- The main purpose of the *Pick and Pack* module is to assist in picking goods in the warehouse. One of the main features of this module is the pick list. The warehouse employee can use the *Pick List* to collect the different items needed and mark them as picked.

- The *Pick List* can be used in:
  The sales process, when delivering goods to customers.
  The production process, when picking component items for production.
  And when items are to be transferred to another location or warehouse.

- In addition to creating pick lists, in the *Pick and Pack Manager*, we can also issue different documents relevant for the sales process, production process and inventory transfer.

- The main benefits deriving from these features are:
  Generating a batch of pick lists and documents in just a few clicks.
  Making the picking process easy, fast and accurate.
  Using the *Pick and Pack Manager* as a workbench from which the user can create sales, production and inventory transfer documents and thus minimizing the need to go into different modules in the system.

Business Example

- OEC Computers resells computers and electronic equipment to retailers.
- George is the warehouse manager of OEC Computers. He and his SAP Business One consultant, are about to implement the *Pick and Pack* module in the company.
  George wants to incorporate the *Pick and Pack Manager* in the sales process. He would like to create pick lists for items in sales orders that are about to be delivered to the customers. He would also want to create a packing slip to attach to the packages delivered.
- You explain to George how to work with the *Pick and Pack Manager* in order to create pick lists. In addition you show how to leverage the *Pick and Pack Manager* to create deliveries and invoices based on the processed sales.

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Pick and Pack Sales Process in OEC Computers

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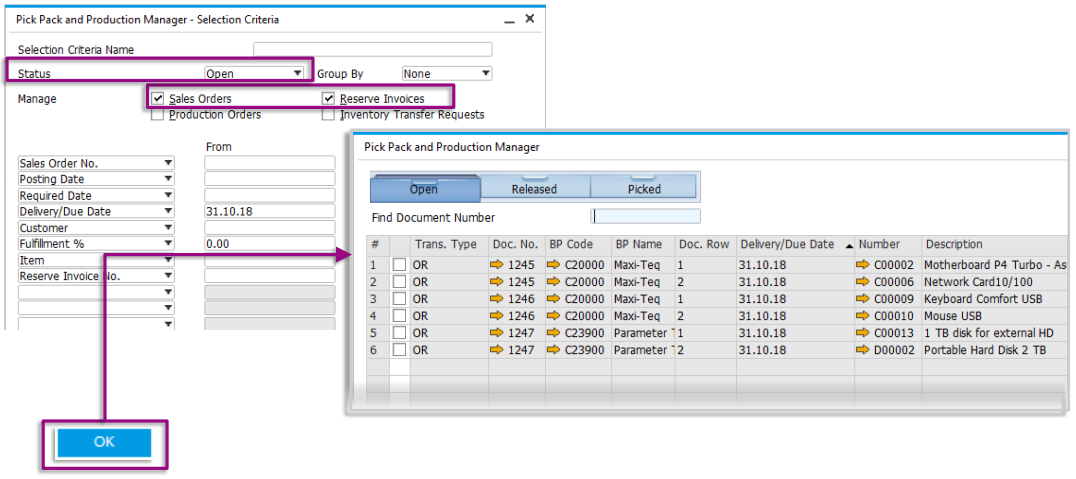
- The image illustrates a common sales process in OEC computers up to the item delivery stage. A big part of this process can be done in the *Pick and Pack Manager*.
- When *Sales Orders* are created, new records for the item rows of these documents are added in the *Pick and Pack Manager*.
- Then, when delivery time arrives, the warehouse employee generates pick lists for the items about to be delivered to the customer.
- After the items are collected, the warehouse employee can create a *Delivery* document for the picked items.
- Note that the same process can be applied for *Reserved Invoices* in addition to *Sales Orders*.

Pick and Pack Manager

Inventory → Pick and Pack → Pick and Pack Manager



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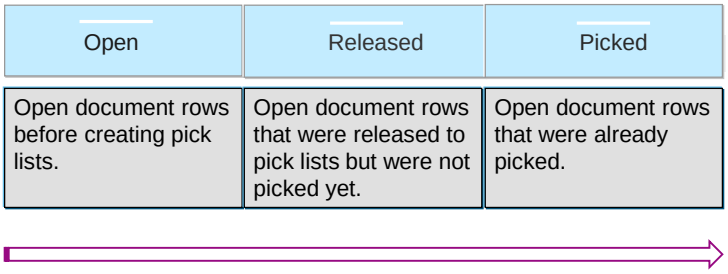
- Let us get to know the *Pick and Pack Manager*.
- The first step in the *Pick and Pack Manager* is to filter the relevant data in the *Selection Criteria* window.
- Here we can choose the base documents for which the pick lists will be generated. Then, we can filter the base documents according to different filtering criteria such as document date, certain items or even a user-defined field (UDF) that was added to the base document. Filter options vary according to the base document chosen.
- In some cases, George filters the sales orders by delivery date to pick only the documents planned to deliver that same day. In addition, OEC Computers manage a UDF for distribution areas, and in order to deliver documents per area, George also filters by this field.
- In this case George wants to see all *Sales Orders* and *Reserve invoices* document rows. Note the *Open* status means rows that were not picked yet, nor released to pick list.
- Once he choses *OK*, the *Pick and Pack Manager* opens and displays 3 drawers: *Open, Released* and *Picked*.
- Let us go to the next slide to understand what kind of data we can find in each drawer.

The Pick and Pack Manager Drawers



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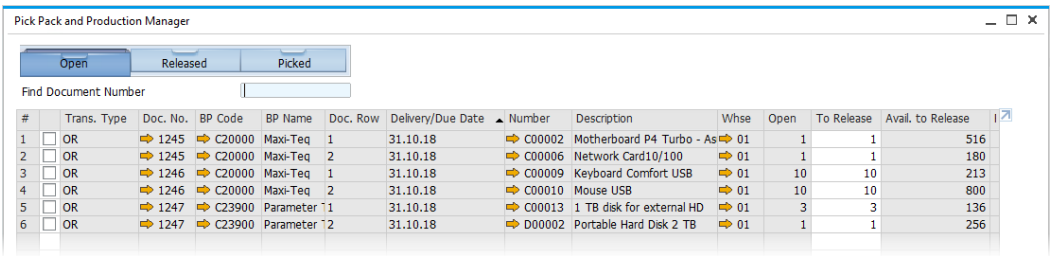
- The *Open* drawer - contains all open document rows that were not picked yet.
- The *Released* drawer - contains all open document rows that were already copied to pick lists but have not been picked yet.
- The *Picked* drawer – contains all open document rows that were already marked as picked in the pick list.
- The drawers are ordered from left to right, according to the traditional sales process but each drawer can be accessed at any time.

Pick and Pack Manager Information



#		Trans. Type	Doc. No.	BP Code	BP Name	Doc. Row	Delivery/Due Date	Number	Description	Whse	Open	To Release	Avail. to Release
1	☐	OR	1245	C20000	Maxi-Teq	1	31.10.18	C00002	Motherboard P4 Turbo - As	01	1	1	516
2	☐	OR	1245	C20000	Maxi-Teq	2	31.10.18	C00006	Network Card10/100	01	1	1	180
3	☐	OR	1246	C20000	Maxi-Teq	1	31.10.18	C00009	Keyboard Comfort USB	01	10	10	213
4	☐	OR	1246	C20000	Maxi-Teq	2	31.10.18	C00010	Mouse USB	01	10	10	800
5	☐	OR	1247	C23900	Parameter	1	31.10.18	C00013	1 TB disk for external HD	01	3	3	136
6	☐	OR	1247	C23900	Parameter	2	31.10.18	D00002	Portable Hard Disk 2 TB	01	1	1	256

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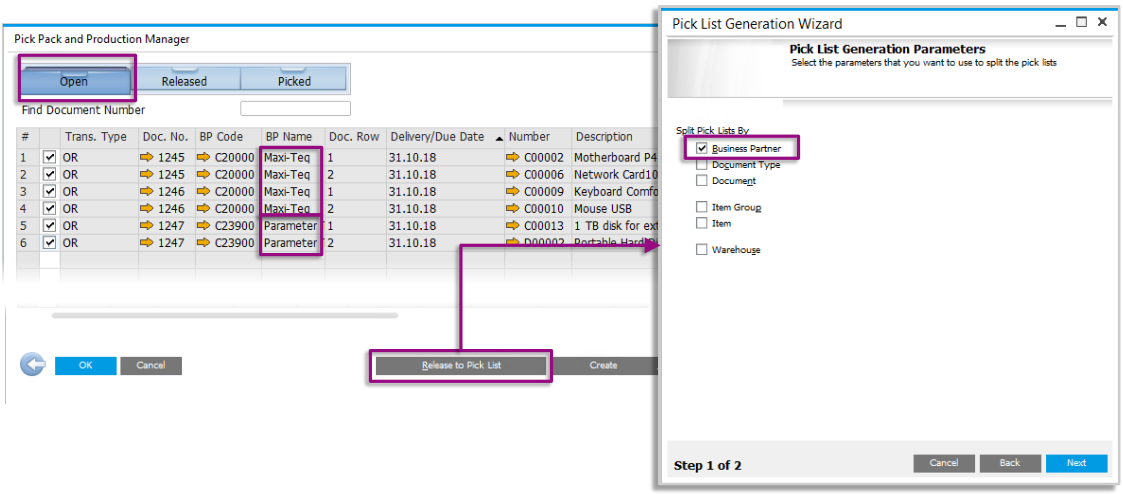
- Inside each drawer we can see various information about the document rows.
- In addition to the rows information like the item details and customer details we can also see here other important information needed in the picking process, for example the open quantity to be picked.
- The open quantity is copied into the *To Release* column. This allows you to release a smaller quantity to the pick list if you choose.
- The *Available to Release* column displays the cumulative quantity of what is available in the warehouse. Notice that each row is dependent on the amounts proposed for picking in prior rows. This column allows you to double-check available quantities in the warehouse.

Release to Pick List



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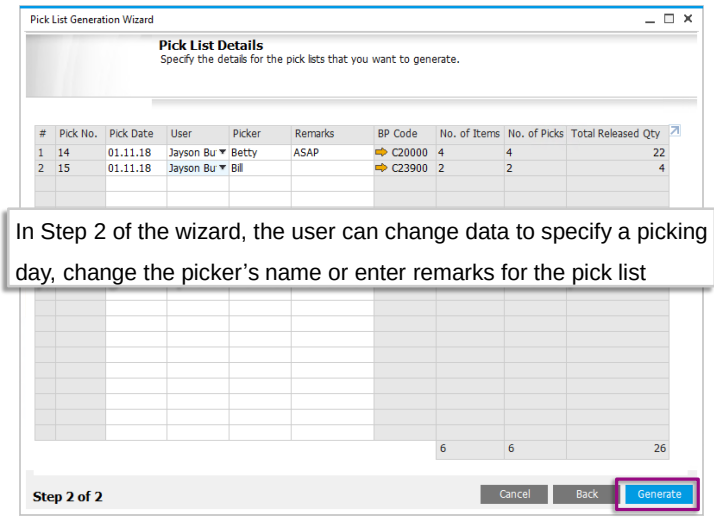
- Let us go back to our process.
  George chooses the sales order rows to be released and then chooses the *Release to Pick List* button. This button triggers a two step wizard. In step 1, we can choose whether to create one pick list for all order rows or to split the rows to multiple pick lists according to parameters you choose. Some examples of parameters are business partners, documents, item groups or warehouses.
- George decides to create one pick list for each customer, so he splits the pick lists by business partners. In this case, since two customers are involved in the sales orders, two pick lists will be generated, and later on, two pickers will be assigned, one for each pick list.

Generate Pick List from the Pick and Pack Manager



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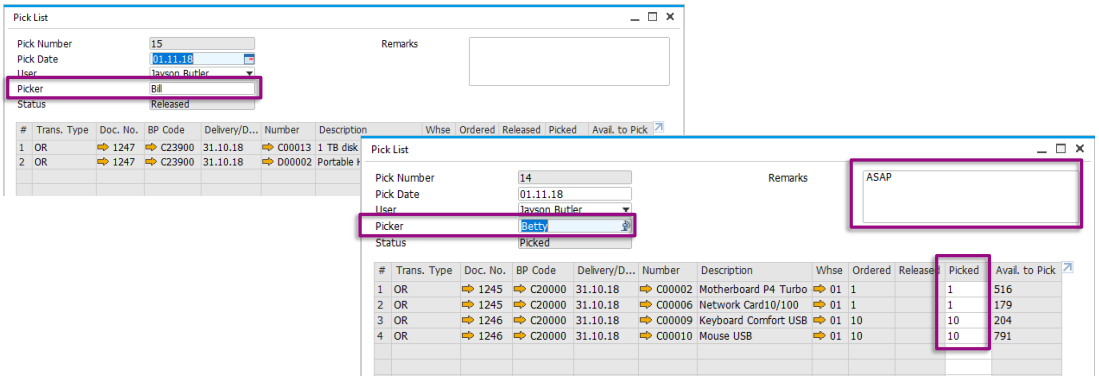
- In step 2 we see the pick lists about to be generated.
- In our case we see three. George manually assigned the first pick list to Bill and the other two to Betty. In addition he added a remark for the first pick list indicating this order should be picked ASAP.
- George chooses the *Generate* button and thus creating three pick lists. We will see them in the next slide.
- *Sales Order* rows that were released to pick lists and were not picked yet, appear in the *Released* drawer in the *Pick Pack and Production Manager*.

- Note: when working with bin location managed warehouse, the *Pick List Generation Wizard* includes another step.

The Pick Lists

Inventory → Pick and Pack → Pick List



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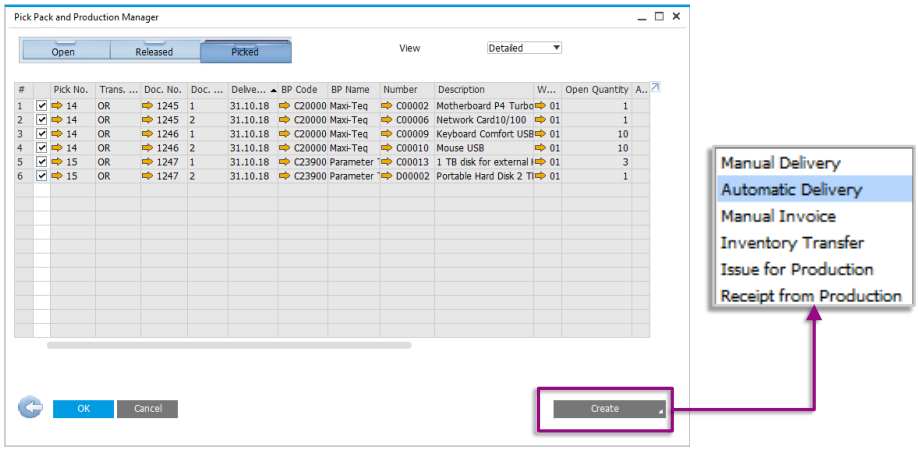
- Here are the two pick lists that were generated, one for each customer. Note that the pick list on the right (No. **14)** contains two sales orders for the same customer. Later on these items can be packed and shipped together. **Bill** and **Betty**, each received a pick list. Looking at **Betty's** pick list image, we can see that she managed to pick all items and indicated that manually in the picked column. In addition the status of the pick list is *Picked*.
  We can also see the remarks George added to Betty's pick list, previously in the *Pick List Generation Wizard*.
- In the pick list rows, we can see, for each order row, the ordered quantity, the released/Picked quantity and the available quantity in inventory.
- The pick lists can be found in the ***Inventory → Pick and Pack → Pick List*** menu entry.

Creating Documents from the Pick and Pack Manager



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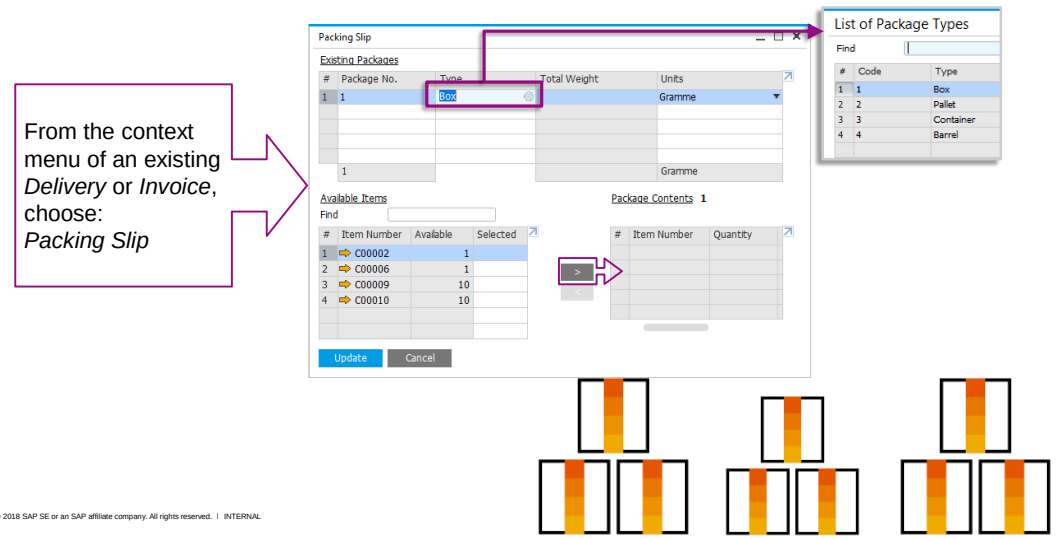
- Let us go back to the *Pick and Pack Manager* to continue with the sales process.
- George opens the *Picked* drawer to make sure orders were picked and to create *Delivery* documents for the picked sales order rows. He does that by choosing the *Create* button which appears in all drawers.
- There are several options for creating documents from the pick list. The types of documents available depend on the base document. Since our example pick list contains *Sales Orders* rows, only a *Delivery* or an *A/R Invoice* can be created.
- When choosing the *Manual Delivery* option, a *Delivery* document is opened in *Add* mode, already containing all information needed. This information can be edited if needed and then added to the system. George chooses the *Automatic Delivery* option since he doesn't wish to change any data. In this case, deliveries will be created per customer, behind the scenes (as long as all conditions for creating the delivery exist).

- Other creation options will be discussed in the next Pick and Pack course topics. Furthermore, in the appendix you can find different creation options for different base documents.

Packing slip



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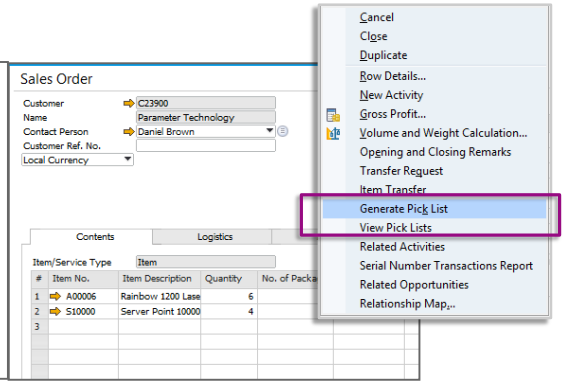
- Before shipping the goods to the customer, a *Packing Slip* can be generated and printed for a *Delivery* or an *A/R Invoice.*
- The *Packing Slip* is generated from the context menu of the *Delivery* or *Invoice*.
- In the *Packing slip*, the warehouse employee chooses the relevant package from the list of package types, that was already defined in ***Administration → Setup → Inventory → Package type***.
- Then, the warehouse employee moves the *Available Items* from the left of the *Packing Slip* to the *Package Contents* on the right, using the arrow.
- This employee prefers to update the slip while physically packing the items. When this process is done, the warehouse employee updates the *Packing Slip*, prints it and attaches it to the package.

- Note that a total weight is calculated only when managing weight for the items in the *Item Master Data*.

Generating Pick List Directly from a Document

- A pick list can be generated directly from a *Sales Order*, a *Reserve Invoice, a Production Order* and an *Inventory Transfer Request*.
- This is done by choosing the option *Generate Pick List* from the context menu.
- It is also possible to view the existing pick lists related to the specific document.



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- Generating a pick list directly from a specific document can be a quick option to handle the picking of that one document.
- This functionality is available to all base documents that are available in the *Pick Pack and Production Manger*: *Sales Orders, Reserve Invoices, Inventory Transfer Requests and Production Orders*.
- Open the context menu and choose one of the following options:

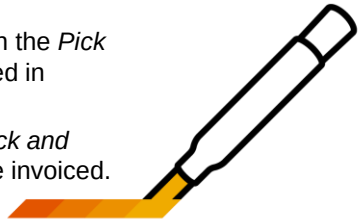
  Generate Pick List - this option generates and opens a pick list for the open document quantity if there is a single picking choice for that quantity (e.g. when all items are in a single bin location). Otherwise the *Pick and Pack Manager* is opened.

  View Pick Lists – this option opens any already existing pick lists related to that document.

In our business scenario, George uses this option when a pick list is needed urgently instead of using the *Pick and Pack Manager*. After the *Sales Order* is added, George generates a pick list directly from the document. All relevant data from the document is then copied to the pick list. Then he reviews the content of the pick list and adds it.

Processing Documents With Non-Inventory Items

- Non inventory item rows can be processed in the *Pick and Pack Manager* and therefore can be used in document creation
- Including non-inventory items in the *Pick Pack and Production Manager*, endure these items are invoiced.



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- It is also possible to process document rows with non-inventory items in the *Pick Pack and Production Manager*.
- In real life, non-inventory items such as technician or support fees, often appear in sales documents.
- Non-inventory item document rows can be processed in the *Pick Pack and Production Manager* as well.
- These document rows can be included in pick lists and can be copied to a delivery or invoice via the *Create* option.
- Note that non-inventory items cannot be copied to an inventory transfer document.
- Also note that production resources can also be copied to a pick list. We will further discuss it in the ***Pick and Pack in Production*** course topic.
- Including non-inventory items and production resources in the *Pick Pack and Production Manager* is a great way to ensure they are invoiced or consumed.

Key Points – Page 1

Key points from this topic:

- The *Pick Pack and Production Manager* supports different processes in the system including: Sales, Production and Inventory transfer.
- The *Pick Pack and Production Manager* enables mass creation of pick lists and also generation of documents.
- The *Pick Pack and Production Manager* has three drawers to display different document row statuses: open, released and picked.
- When releasing the items for picking, a 2-steps wizard is opened, offering different options for the pick list creation such as splitting pick lists and changing mass data.
- The picked quantity is updated in the pick list and thus transforms the items row's status to *Picked*.

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Here are some key points to take away from this session:

- The *Pick Pack and Production Manager* supports different processes in the system including: Sales, Production and Inventory transfer.
- The *Pick Pack and Production Manager* enables mass creation of pick lists and also generation of documents.
- The *Pick Pack and Production Manager* has three drawers to display different document row statuses: open, released and picked.
- When releasing the items for picking, a 2-steps wizard is opened, offering different options for the pick list creation such as splitting pick lists and changing mass data.
- The picked quantity is updated in the pick list and thus transforms the items row's status to *Picked*.

Key Points – Page 2

Key points from this topic:

- Different documents such as *Deliveries* and *Invoices* can be created from the *Pick Pack and Production Manger* for *Sales Order* rows, thus allowing the user to work from one window.
- Packing slips can be made for a delivery or invoice from the context menu of the document.
- Instead of opening the Pick Pack and Production Manager, a user can quickly create a pick list for an individual document from the context menu of any sales order, A/R reserve invoice, production order or inventory transfer request.
- Non-inventory items can also be copied to pick lists and target documents, thus allowing an all-inclusive sale process from the *Pick Pack and Production Manager*.

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Appendix
Document Creation Options – Mapping Table

Base document rows (Existing documents)	Create Option (New documents to be created)
Sales Orders, Reserve Invoices	Manual + Auto Delivery
Sales Orders	Manual Invoice
Production Orders*	Issue for Production
Production Orders	Receipt From Production
All document type rows except for Inventory Transfer Request	Inventory Transfer Request
All document type rows	Items/ Components Transfer
Inventory Transfer Request	Inventory Transfer

* Excluding Backflush items

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- The options from the *Create* button in the *Pick Pack and Production Manager* drawers are context sensitive.
- The table shown here lists the options available for document creation for each type of base document rows.
- Not all rows need to go to the same document. You can choose the rows you want to be included in each document you create.
- For example, you can create an *Issue for Production* based on production order rows only. The user can only choose rows that are not set as backflush items.
- If you try to create new documents based on document rows that are not relevant for a certain type of document, the system displays a relevant error message.
- The *Items/ Components Transfer* create option, generates an *Inventory Transfer* document. The main difference between the *Items/ Components Transfer* option and the *Inventory Transfer* option is the purpose of each created document. The purpose of an *Inventory Transfer* is to complete the process initiated by the inventory transfer request. The purpose of the *Items/ Components Transfer* option is to transfer goods to a picking area.
- Note that when creating an *Inventory Transfer* from any document other than *Inventory Transfer Request*, the warehouse and bin location information is copied to both the from and to warehouse and bin location fields. The user can then change the content of these fields manually.

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