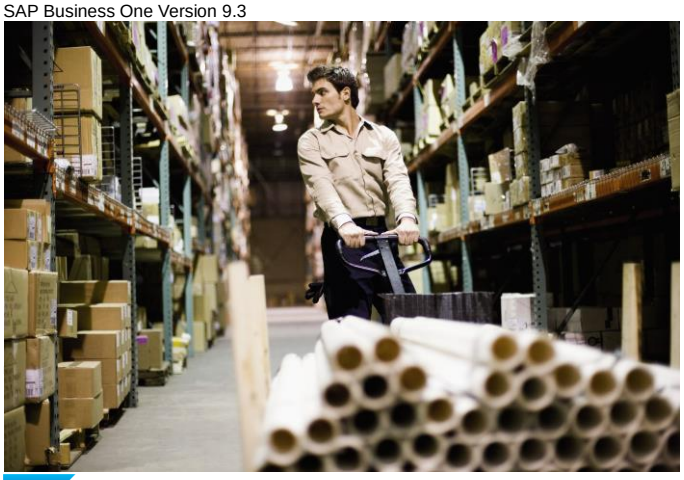
Pick and Pack in the Inventory Transfer Process

SAP Business One Version 9.3



Run Simple

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- Welcome to the **Pick and Pack in the Inventory Transfer Process** course.
- In this training we will see how we can use the *Pick Pack and Production Manager* in the process of picking items for transfer.
- In order to take this course, you first need to complete the **Pick and Pack in the Sales Process** course topic.

Objectives

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

- Run the *Pick Pack and Production Manager* to create *Pick Lists* and documents for inventory transfer.

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After completing this topic, you will be able to:

- Run the *Pick Pack and Production Manager* to create *Pick Lists* and documents for inventory transfer.

Business Example

OEC Computers manages multiple warehouses. From time to time, they need to replenish the distribution warehouses from their main production warehouse.

OEC has already implement pick and pack processes for sales and production in their warehouses. Now they would like to add functionality for picking items for transfers between warehouses.

Their Business One consultant shows them how to use the *Pick Pack* and Production *Manager* to create pick lists and record inventory transfers.

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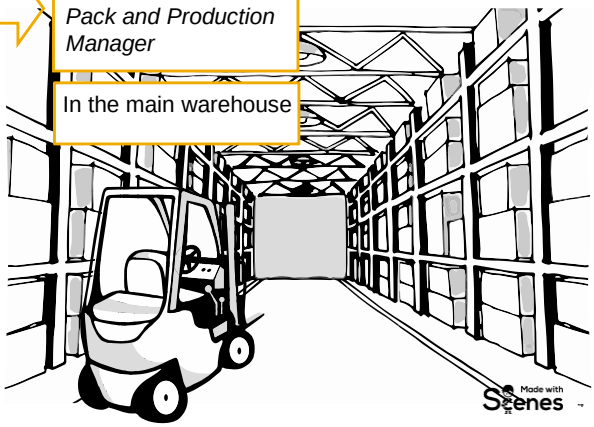
Their Business One consultant shows them how to use the *Pick Pack and Production Manager* to create pick lists and record inventory transfers.

Pick and Pack for Inventory Transfer Process – Concept and Scenario

Creating a pick list based on an *Inventory Transfer Request*:

Create an *Inventory Transfer Request*	Create pick lists for the *Inventory Transfer Request*	Create an *Inventory Transfer* from the *Pick Pack and Production Manager*
In the distribution warehouse	In the main warehouse	In the main warehouse



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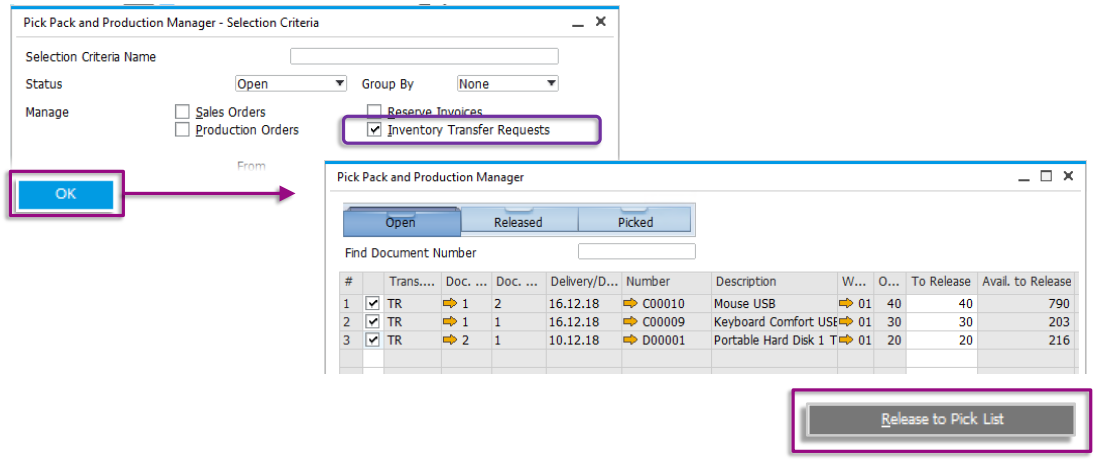
OEC Computers has integrated the pick and pack process for inventory transfers.
When the inventory in the distribution warehouse is about to be depleted, the warehouse employee creates an *Inventory Transfer Request*, to transfer the goods from the main warehouse.
The employee in the main warehouse opens the *Pick Pack and Production Manager,* selects the inventory transfer request rows and creates pick lists.
After the goods are picked, the main warehouse employee creates an *Inventory Transfer* document from the *Pick Pack and Production Manager*, based on the picked rows from the inventory transfer request.
In the next slides we will see how it is done in the system.

Inventory Transfer in the Pick Pack and Production Manager 1/2

Inventory → Pick and Pack → Pick Pack and Production Manager



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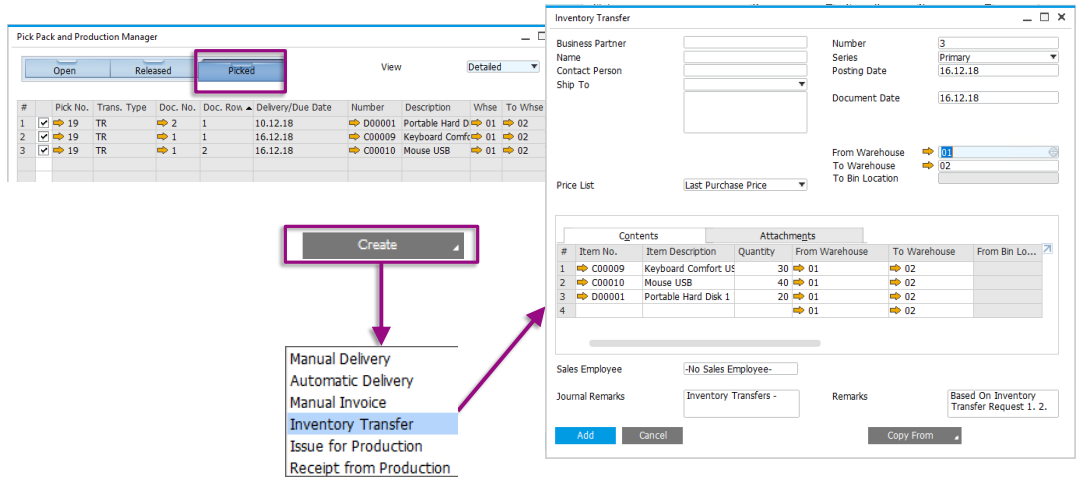
- The main warehouse employee runs the *Pick Pack and Production Manager* to generate the pick lists for the *Inventory Transfer Requests*.
- In the *Pick Pack and Production Manager - Selection Criteria* window he chooses *Inventory Transfer Requests*.
- Then he chooses *OK* to enter the *Open* drawer.
- Next, he checks all *Inventory Transfers Request* rows and chooses the *Release to Pick List* button.

Inventory Transfer in the Pick Pack and Production Manager 2/2



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After pick lists are generated and items are picked, the main warehouse employee opens the *Picked* drawer to create an *Inventory Transfer for the Inventory Transfer Request* rows.

Additional scenario –
Inventory Transfer Request as a Target Document

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OEC Computers has a special packing area for deliveries of delicate or fragile items. This area is managed as a separate bin location in the warehouse, in order to track the items that are transferred to this packing area. To transfer the items, the warehouse employee uses the *Create* option from the *Pick Pack and Production Manager*.
In this case the process would be:

- Create sales orders
- Then, in the *Pick Pack and Production Manager*, in the *Open* drawer, select the sales order rows and create *Inventory Transfer Requests*.
- And then pick the items and create the *Inventory Transfer* documents as explained in the previous scenario.

Summary

Key points from this topic:

- In the *Pick Pack and Production Manager* you can process *Inventory Transfer Requests*. This means you can create pick lists to collect the items and then create an *Inventory Transfer* document that is based on the request.
- In addition, you can use the *Pick Pack and Production Manager* to create *Inventory Transfer Requests*, based on *Sales Orders, Reserve Invoices* or *Production Orders*.

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

- In the *Pick Pack and Production Manager* you can process *Inventory Transfer Requests*. This means you can create pick lists to collect the items and then create an *Inventory Transfer* document that is based on the request.
- In addition, you can use the *Pick Pack and Production Manager* to create *Inventory Transfer Requests*, based on *Sales Orders, Reserve Invoices* or *Production Orders*.

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