

1. PDMX for SAP Business One

Introduction

PDMX for SAP Business One extends the standard functionality of SAP Business One with functions to support shopfloor operations in the area of production, packaging, inventory management and logistics (inbound, picking, shipping). PDMX consists of 3 parts:

1. Extensions of existing SAP Business One functions (e.g. article, users, ...)
2. An administrative Produmex module offering new office functions for defining e.g. the organizational structure of a company, the creation of inventory reports, definition and planning of delivery routes, the creation of step lists for production and packaging, the creation of picklists, etc.
3. Finally PDMX offers functions to support the shopfloor operations. These functions are made available on the shopfloor through "thin clients". This includes touchscreens, handheld terminals, ... through which the operators can execute the production, packaging and logistics operations and transfer the required information transparently to SAP Business One. PDMX also provides connections to data capture (barcode) and print devices (label and document printers).

2. Terminology

LUID = Logistic Unit ID

BBD = Best Before Date

ITRI = Item Transactional Information Key. This is a key used to identify a batch, batchnumber 2, BBD

OSE = Organizational structure element. Element used to define the structure in the company.

(Example: Bin, Warehouse, Printer, ...)

UDT = User defined table

UDF = User defined field

ATP = Available to promise

PocketSize = The small screen layout, used on a scanner.

TouchScreen = The large screen layout, used on touch screens.

PRD = Production Order

DB = Database

BOM = Bill of material

WAS = Warehouse automation system

WA = Warehouse automation

Client = A device (Scanner or touchscreen)

Device = A scanner or touchscreen

AI = GS1 Application Identifier

3. Extensions of SAP Business One

PDMX extends SAP Business One's standard functions with a number of concepts that are important for the operational management of items, including Best Before Date, location code,

Apart from this PDMX also adds a number of specific parameters to standard SAP Business One functions, which have to be set to ensure the proper functioning of PDMX.

3.1. Item Master Data

3.1.1. Item Master Data Main Screen

The screenshot shows the 'Item Master Data' window in SAP Business One. The 'General' tab is selected, displaying various configuration options. Key fields include 'Tax Liabile' (checked), 'Do Not Apply Discount Groups' (unchecked), 'Manufacturer', 'Additional Identifier', 'Shipping Type', 'Serial and Batch Numbers', and 'Manage Item by' (set to 'None'). The 'Production Data' section includes 'Phantom Item' (unchecked) and 'Issue Method' (set to 'Backflush'). There are also checkboxes for 'Has PMX serial number' and 'Track location of serial numbers', and a 'Serial number format' dropdown. The bottom of the window contains 'Find', 'Cancel', and 'PMX Inventory' buttons.

Bar Code

Bar code is an existing field in SAP Business One. PDMX offers users the possibility to enter a GTIN-14 (*GS1 Global Trade Item number*) or a free code. If the user enters a GTIN-14 code, the system verifies whether this is a correct bar code (*according to the GS1 rules*). On the scanner it will be possible to scan an EAN 13. The system will convert it to a GTIN, and check that GTIN against the barcode on the item master data. So if you have valid EAN 13 barcodes, it should be stored in the system as a GTIN, with a leading 0 in front of the EAN 13.

Has PMX serial number

In SAP Business One an item can be managed by batches OR serial numbers. PDMX also allows to manage an item both by batches AND serial numbers.

Track location of serial numbers

If this is checked PDMX will keep track of the location of items with serial numbers (*both SAP serial numbers as well as PDMX serial numbers*). The system does this, by forcing the stock to be on an SSCC. The serial number is linked to that SSCC.

Serial number format

Specifies the serial number format as a regular expression. The available formats will have to be specified in the User Defined Table (*default form*) "PMX_ISFT" (*Produmex Item Serial Number Format*).

3.1.2 Item Master Data - Inventory tab

#	Whse ...	In Stock	Committed	Ordered	Available	PMX free stock	Min. I...	Max. I...	Req. ...	Item Cost	UOM2 qty warehouse	UOM2 qty confirmed	UOM2 qty ordered	UOM2 qty available
1	⇒ 01	59	130	10	-61	59				1,072	29.940	65.000	5.000	-30.060
2	⇒ 02													
3	⇒ 03													
4	⇒ 04													
5	⇒ 98													
6	⇒ 99													

There are some columns added on this inventory grid:

PMX Free stock

This is the free stock that is available for Produmex. This is the sum of the quantity in inventory minus the sum of the quantity that is locked.
 (SUM(PMX_INVT.Quantity) - SUM(PMX_INLD.Quantity))

The UOM2 columns will only be filled in when there is a UOM2 defined.

Uom2 qty warehouse

This is the quantity for the second UOM that is in stock. In case it is a catch weight item, this will be the actual weight. If it is an item with a UOM2, but no catch weight, this will be the calculation of UOM2 based on the default ratio between both UOM.

Uom2 qty confirmed

This is the quantity for the second UOM that is committed. The calculation of UOM2 based on the default ratio between both UOM.

Uom2 qty Ordered

This is the quantity for the second UOM that is ordered. The calculation of UOM2 based on the default ratio between both UOM.

Uom2 qty available

This is the quantity for the second UOM that is available. The calculation is: (In stock + Ordered) - Confirmed

3.1.3. Produmex Item Master Data Tabs

Under the Inventory function → Item Master Data, a special Produmex tab has been added which contains a number of fields that are not available in standard SAP Business One.

3.1.3.1. Inventory

The screenshot shows the 'Item Master Data' window with the 'Inventory Data' tab selected. The form contains various fields for defining inventory characteristics. Key fields include:

- UoM Name:** Searchable field for the unit of measure.
- Number of decimals for uom 1:** Set to 0.
- Uom 2:** Searchable field for the second unit of measure.
- Number of decimals for uom 2:** Searchable field.
- 1 uom 2 =:** Conversion rate, set to 0.0000.
- Has best before date:**
- Has second batch number:**
- Default quantity on logistic unit:** 0.0000
- Is logistic carrier:**
- Is logistic unit (GS1):**
- Has no value:**
- Standard location/zone:** Searchable field.
- Report label key:** Searchable field.
- Report label number of copies:** Searchable field.
- Ask for quantity on item label printing:**
- Sevesso class:** Searchable field.
- Use in WA functionality:**
- Is returnable item:**
- Non inventory returnable item code:** Searchable field.

Below these fields is a table for 'Zone type code' and 'Zone type name' with a 'Delete row' button.

Inventory UoM

Inventory UoM is an existing SAP Business One field, with a formatted search on the SAP OUOM table. This table contains all the defined UoM's.

Number of Decimals for uom1

This field indicates the number of decimals for the first UoM. This is used in flows when entering a quantity.

Uom 2

Uom2 identifies the second UoM for the item.

1 uom 2 =

If a second UoM is defined, the conversion rate between the two UoM's is entered in this field.

Has best before date

If the item has a best before date, this field has to be ticked.

Has second batch number

Defines whether the item has a second batch number.

Default quantity on logistic unit

Defines whether the item has a default quantity on a logistic unit. Receiving a logistic unit of the item will then automatically generate a goods receipt for the specified quantity

Is logistic carrier

This field has to be ticked if the item in question is a logistic carrier (pallet, europallet, container, ...).

An item can be a logistic carrier as well as a returnable item, e.g a europallet.

Is logistic unit (GS1)

A logistic unit is an individual unit that has been composed for transport and/or storage and have to be manageable throughout the supply chain. These items are identified by means of the Application Identifier 01 in the GS1 standard.

Has no value

Only applies to logistic carriers. If this is checked, the system will allow to deliver the logistic carrier free of charge to the customer during ad hoc picking – customer collect.

Standard location/zone

Here a default location or zone can be specified for an item. This will be shown as information on the handheld.

Report label key

The identification of the label that belongs to a specific item.

Report label number of copies

The number of labels that have to be printed for a specific item.

Ask for quantity on item label printing

If checked the system will ask to enter a quantity. This entered quantity is passed to the label. This can be used for instance to put the weight on the label.

Item label printing by packaging type

If checked the system will print item labels based on packaging types. When item labels need to be printed, the user can enter the number of labels by each packaging type + inventory uom. On packaging types it is possible to set a specific report for each packaging type. Also the number of copies can be set there. (See page 22). If the global option on Company for automatic printing of item labels during goods receipt (See page 59) is set to true, and the option for printing item labels by packaging type is set to true, the system will print the label for the packaging type linked to the purchase order, of purchase uom in case of receiving without PO.

Seveso class (Hazmat in North America)

Defines the seveso class the item belongs to. Based on the Seveso class, PDMX will check the quantity of the item that can be ordered (maximum inventory). An order for a quantity that will exceed the maximum allowed inventory will show a warning. Receiving the goods will be prevented. Configuration is done in user defined table: PMX_SEVE

Is returnable item

This field is checked if the item in question is a “returnable item” (“empties”).

Non-inventory returnable item code

This field contains the item code of the non-inventory returnable item. This code is used for the delivery and receipt of returnable items (“empties”) and is one-to-one coupled with the inventory item code of the same returnable item. (This is configurable on the organizational structure on the ‘General’ tab of the company)

Use in WA functionality

Enable this option to use this item for the WA functionality.

Force serial numbers during cycle count?

When this option enabled for an item with PMX serial numbers and track location enabled, then serial numbers must be entered during cycle counting operations. Otherwise, it's also possible to just enter the counted quantity.

Note: This option has no effect on SAP serial numbered items. For such items, serial numbers must always be entered during cycle count.

Zone type code

Apart from indicating a standard location or zone, the user can also specify the zone type code. If such a code is entered, the system verifies upon storing an item whether it can be stored in this zone and prevents the item from being stored in a different zone. This can be used for instance if a product needs to be 'cooled'. If the product has this zone type, it can only be stored on location within a zone that is also 'cooled'

3.1.3.2. Sales

The screenshot shows the 'Item Master Data' window with the 'Sales' tab selected. The 'Shelf life delivery' field is set to 0. Other fields include 'Pick type', 'Pick type 2', 'Bulk pick quantity' (0,0000), 'Enter reason for sales return', 'Print label during picking', 'Replenishment: quantity on pick locations' (0,0000), 'Estimated sales quantity by month' (0,0000), 'Default quality status for sales return', 'Allow multiple batches on sales doc.' (checked), 'Allow stock to be locked in advance', 'Smallest sellable packaging type', 'Default log. car. picking', and 'Scan base component'. The 'Sales remarks' field is also visible.

Shelf life delivery

This field specifies the minimum remaining shelf life in days of an item (article) from the moment it is outside the responsibility of the manufacturer/distributor (external shelf life), i.e. the actual period that the product is physically present at the customer and can be sold to the end customer. The external shelf life is defined by the Best Before Date and means that the product will need to stay good at the retailer for at least a specified number of days before the "Best Before Date". To guarantee that a product can be sold long enough, the retailer usually requires a minimal external shelf life from the manufacturer/distributor of the product.

Pick type

Will define how an item will be handled during pick list generation and picking. The list of item pick types is defined on the User Defined table "PMX_IPIT". If an item is a of a certain pick type (e.g.

'Handle with care') and it is indicated on the Produmex Pick List Type (User Defined Table "PMX_PITY") that a pick list should be split based on the item pick type, this item will not be added to pick list with items of another pick type (e.g. slow mover). In this case two pick lists will be generated. On the UDT "PMX_UIPT" users can be linked to certain item pick types. If such a configuration exists, the system will only allow the user to pick items that he is allowed to pick. This option is used in the 'Zone picking' option on the scanner.

Pick type 2

Apart from the primary pick type, an item can also have a second pick type. The list of item pick types is defined on the User Defined table "PMX_IPIT". If it is indicated on the Produmex Pick List Type (User Defined Table "PMX_PITY") that a pick list should be split based on item "pick type 2" the system will generate separate pick lists based on this criterion, if applicable in combination with the first pick type. The configuration for linking it to a user is also available for item pick type 2.

Bulk pick quantity

The quantity (lower or equal than a full logistic unit) for which the system will also allow to pick from a bulk location. This is used on stock allocation to a pick list, when it is selected on the scanner. Configuration on the PickListController needs to allow picking from bulk. Example: If bulk quantity = 10 and on the sales order you need 24 items, 20 pieces can be picked from bulk, and 4 from pick location.

Enter reason for sales return

Indicates whether a reason has to be specified when a sold item is returned.

Print label during picking

Set whether item labels need to be printed during picking for this item.

Replenishment: quantity on pick locations

The quantity of that item that should be available on pick locations. Based on the parameters that are set in the "Item-based replenishment generator" the system will check whether there are pick locations with this item where there is a lower quantity than the needed quantity and will replenish these. In the "item-based replenishment generator" it can be specified whether or not the system has to take into account open pick lists, pick lists for a specific due date range, or required quantities for a specific stock coverage period (based on the estimated sales quantity by month)

Estimated sales quantity by month

Estimated sales quantity to be sold by month (1 month = 30 days), to be used for stock coverage calculations. Used by the "Item-based replenishment generator".

Default quality status for sales return

Indicates the default quality status of a sold item that is returned. The standard possibilities are: blocked, quarantine, released, rejected, returned. This overrides the general definition of the quality status for sales return.

Allow multiple batches on sales doc.

Indicates whether it is allowed on a sales document to have multiple batches of an item in one line (e.g. ordered quantity cannot be fulfilled by a single batch of a product). This is for information only.

Allow stock to be locked in advance

When this option is set to true, this item can be used for locking in advance. This means it will be possible to lock the stock for certain customer(s) at the moment the stock is received.

(Purchase/production/inventory receipt, warehouse transfer)

Smallest sellable packaging type

Indicates the smallest packaging type of the item that can be sold. This is for information only.

Default log. car. picking

The default logistic carrier that is used for the product (e.g. a CHEP or a EURO pallet, ...) on the picking process. This is for information only.

Scan base component

In case items are shipped in a special container (e.g. a crate), it can be indicated that the base component needs to be scanned, instead of scanning the container with the items (*the crate as a whole*). So a single item in the crate has to be scanned to make sure that the crate is sent containing the right items.

This is used in the Picking flow on the scanner. It uses a BOM to check the base component.

Packing remarks

Specific remarks for packing the item in question which is shown on the RF terminal or touchscreen when handling the item.

Packing image

Image of the specific packing of the item in question (e.g. picture of the kit). This image is shown during Packing and Consolidated packing flow.

Sales remarks pop-up

If checked, the system will show the sales remarks that are specified for the product when selecting the product on a sales document.

Sales remarks

Specific remarks that are shown in SAP Business One when creating a sales order for this item.

Add non-inventory item to pick list

If some non-inventory items need to be on the pick list, this option can be checked. When creating a pick list/proposal, the system will add this item to the pick list/proposal.

This option can only be set for items that are configured to be non-inventory items.

This item can be picked/packed on the scanner/touchscreen. Only the quantity will be asked as this is a non-inventory item.

When the pick list has 10 pieces to pick, and the user only enters 8, the system will register this 8 pieces, but the 2 additional pieces will automatically be skipped, so they will not be picked.

Grid: Shelf life by customer and country

PDMX also offers the possibility to define a shelf life per individual customer and/or countries, apart from the general shelf life. This is then taken into account when picking goods (*i.e. some goods may still be picked for certain customers or countries, but not for others*).

You can enter a shelf life for either just a customer, or just a country, or a combination of both a customer and a country.

3.1.3.3. Purchase

Shelf life reception

The minimum number of days a product will have to remain sellable from the moment the system receives the product into inventory (*prior to the product's expiry date*).

Enter reason for purchase return

Indicates whether a reason has to be specified when returning a purchased item.

Default quality status for reception

This is the default quality status when receiving the item in question.

Released quality status for reception

The released quality status for reception. This is only used for the 'Quality status for reception by batch' controller. When the system receives a quantity of this item of a certain batch, the system will check whether there is already a specific quantity of the same batch available with the "released quality status". If there is such a quantity available, the system will overrule the default quality status and assign the released quality status to the received item.

Expiry def. for reception

Allows to specify the expiry definition for reception as defined in the User Defined Table "PMX_EXDE"
- Expiry Definitions

Purchase barcode type

If the purchase barcode differs from the main barcode, the type of this barcode can be filled in. The possible values are: GTIN-14 (*GS1 Global Trade Item Number*) or a free code. If the user enters a GTIN-14 code, the system verifies whether this is a correct barcode (*according to the GS1 rules*).

Purchase barcode

Contains the purchase barcode if it is different from the main barcode.

Create SSCC on reception

If checked the system will automatically generate an SSCC on reception if no SSCC was scanned. If unchecked, no SSCC will be created and stock can be manipulated without reference to the SSCC. If multiple items are received, and at least one of them requires an SSCC, the system will create one. If no SSCC is created at reception, no put away order will be generated. Items need to be moved through ad hoc movement.

If the items is configured as a serial number, with track location on, this setting needs to be ticked.

Print label at reception

Set whether item labels need to be printed at reception for this item.

Sample quantity

Defines the quantity (*in inventory uom*) of the sample that should be sent back for inspection. The sample generator will use this quantity to generate the sample order (*Sales order*). The generation of the actual sample order is done through the SboNotificationListener.

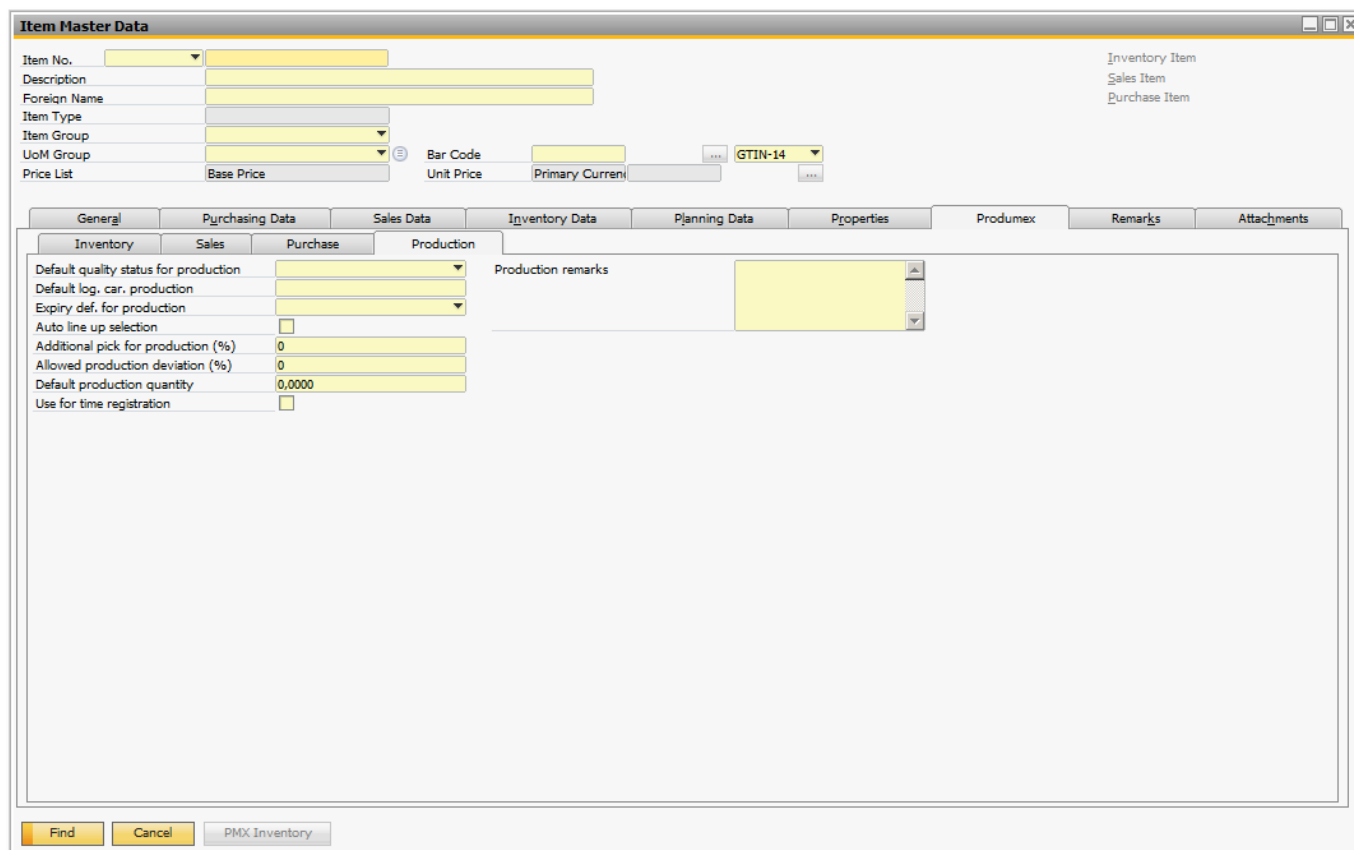
Purchase remarks pop-up

Is set to true, the text in the purchase remarks is shown as a pop-up when using this item in a purchase document in SAP.

Purchase remarks

The purchase remarks to be shown when selecting the item in a purchase document in SAP.

3.1.3.4. Production



The screenshot shows the SAP 'Item Master Data' window with the 'Production' tab selected. The 'Production' sub-tab is active, displaying various production-related settings. On the left, there are fields for 'Default quality status for production', 'Default log. car. production', 'Expiry def. for production', 'Auto line up selection', 'Additional pick for production (%)', 'Allowed production deviation (%)', 'Default production quantity', and 'Use for time registration'. On the right, there is a 'Production remarks' text area. The 'General' tab is also visible, showing fields for 'Item No.', 'Description', 'Foreign Name', 'Item Type', 'Item Group', 'UoM Group', 'Price List', 'Bar Code', and 'Unit Price'. The 'GTIN-14' dropdown is set to 'GTIN-14'. At the bottom, there are 'Find', 'Cancel', and 'PMX Inventory' buttons.

Default quality status for production

This is the quality status the stock will get when producing new stock. This overrules the general

setting.

Default log. car. Production

This is the default logistic carrier for production. If this is set, the system will automatically use that logistic carrier to put the stock on.

Expiry def for production

Allows to specify the expiry definition for production as defined in the UDT "PMX_EXDE" - Expiry Definitions

Auto line up selection

Does this item need to be automatically lined up? If set to true, the system will automatically line up the location, instead of letting the user select it. This option is used in combination with the production manager.

Additional pick for production (%)

When picking for production without a pick list, the system will propose to pick more than theoretically needed for the production order.

Allowed production deviation (%)

The allowed deviation of the produced quantity. This is used in combination with the setting 'Confirm produced quantity after production' on the production controller (See page 101). It will check if the deviation is allowed, based on the default quantity to produce. If it is not allowed, a warning is shown on the flow.

Default production quantity

This is the default quantity on a produced logistic unit. This setting is used in combination with the 'Split produced quantity into logistic units of default size' setting on the ProductionController.

Use for time registration

Indicates if the item is used as a time registration type that can be added to a Bill of Material and a production order. The quantity is in hours.

Production remarks

Here production remarks for the item. This is for information only.

3.1.3.5. Catch weight**Catch weight item?**

Indicates if the item is a catch weight item.

GS1 AI for uom

The GS1 application identifier to capture the quantity for pieces. This is informational.

GS1 AI for uom2

The GS1 application identifier to capture the quantity for the weight. This is informational.

1 uom = xxx uom 2

The weight of 1 piece.

Weight tolerance (%)

The weight tolerance in percentage. Here it can be defined what the allowed tolerance for the weight is. If the tolerance ≥ 100 , no tolerance check will be done. This check will be used for all documents except: goods issue and goods receipts. Calculation:

$(\text{Pieces} * \text{Default weight of 1 piece}) -$
 $(\text{Pieces} * \text{Default weight of 1 piece}) * \text{Weight tolerance}/100$
< Allowed weight <
 $(\text{Pieces} * \text{Default weight of 1 piece}) +$
 $(\text{Pieces} * \text{Default weight of 1 piece}) * \text{Weight tolerance}/100$

Uom to use for purchase

The uom that should be asked when receiving items.

Possible values:

- Pieces (UOM1): The weight is calculated based on the weight of 1 piece.
- Weight (UOM2): The number of pieces are calculated based on the weight of 1 piece.
- Pieces and weight

Uom to use for inventory

The uom that should be asked when moving items.

Possible values:

- Pieces (UOM1): The weight is calculated based on the weight of 1 piece.
- Weight (UOM2): The number of pieces are calculated based on the weight of 1 piece.
- Pieces and weight

Uom to use for sales The uom that should be asked when delivering items.

Possible values:

- Pieces (UOM1): The weight is calculated based on the weight of 1 piece.
- Weight (UOM2): The number of pieces are calculated based on the weight of 1 piece.
- Pieces and weight

Price calculation for sales

The calculation of the price for creating a sales delivery.

Possible values:

- Price by piece: This option is the default option. In this case no price calculation is done because the price from SAP is already by piece
- Price by weight: The calculation of the price is done by weight.

Price by weight

When a sales delivery/reserve invoice is generated, the price will need to be set when:

- The item is a catch weight item
- The option for price calculation is set to 'Price by weight'
- The base document is NOT an invoice
- Delivery is made through Produmex functionality

The unit price before discount will be adjusted. The default unit price is based on the default weight of a catch weight item. So a recalculation based on the actual delivered weight needs to be done.

The calculation formula is: Unit price before discount = (Unit price before discount sales order /

Default weight by piece) * Actual weight) / Quantity

Database columns: $DLN1.PriceBefDi = (RDR1.PriceBefDi / OITM.U_PMX_DQUM) * DLN1.U_PMX_QTY2) + DLN1.Quantity$

Example:

ItemA

- * Inventory uom = Case
- * Weight uom = Pounds
- * 1 Case = 24 pounds (U_PMX_DQUM = 24)
- * Price per case = 48\$ (= 2\$ / pound)

Sales order

- * 20 cases
- * Unit price = 48\$
- * Total price = 960\$

When we deliver the 20 cases the actual weight = 500 pound (Nominal weight was 480 pound)
The calculation is as follows:

$(\text{Unit price sales order} / \text{Default weight by piece}) * \text{Actual weight} / \text{Quantity} = \text{Unit price} (48\$/24 \text{ pounds}) * 500 \text{ pounds} / 20 \text{ cases} = 50\%$

Total price of the delivery line will be 1000\$

This means if you deliver 500 pounds, this is 2\$ by pound.

3.1.3.6. Attributes

Packaging type

Shows the packaging type of the item. If the UoM Group of the item is set to manual, the user can define here a specific packaging type based on the SAP OUOM Table. If the item is linked to a defined UoM Group, the system will apply the packaging type specified therein.

Packaging type code

The packaging type code.

Number of UOM 1

The quantity in the packaging, in inventory uom.

Has variable quantity (Goods entry)?

If the quantity for the packaging type can change on each goods entry, this option can be set to true. If the item is batch controlled, the system will ask during goods entry what the quantity in the current packaging type is. This information will be stored, linked to the batch information.

Hide during entering quantity

When this option is set, that packaging type is not shown to the user when he needs to enter quantity to receive.

Item label report

The specific report that needs to be printed when the option 'Item label printing by packaging type' is set to true. When a report is selected, the number of copies need to be more than 0.

Copies item label

The number of copies that need to be printed in case of option 'Item label printing by packaging type' is set to true. If this is set to 0, no item labels will be printed for that packaging type.

Batch attributes

If an item has a batch, batch2 or BBD, the system can ask for batch attributes during reception and production.

When a new combination of batch, batch2 or BBD is entered, the system will ask for the batch attributes linked to the item.

The data will be stored into the table PMX_ITBA.

There are some predefined batch attribute types. Those batch attributes will be stored also on the table PMX_ITRI.

Batch attribute code

This is a list of batch attribute types defined in the UDT @PMX_BATT (See page 45)

Value entry option at reception

This will set whether the value should be asked during reception Possible values:

- Required: User will have to fill in the data
- Optional: User can skip entry of the data.
- Hidden: This batch attribute will not be asked during reception.

Is linked to batch?

When this option is set to true, this batch attribute will be linked to the batch number.

This means when a new combination of batch/batch2/BBD is created, and the batch number already exists in the system for this item, the batch attribute is not asked to the user, but the value is copied.

Allergens

This grid stores all the allergens the item can have.

Allergen code

This is a list of allergens defined in the UDT @PMX_ALLE (See page 50)

Can contain allergen?

If this product does not contain the allergen by default, but it is possible that some trace of this allergen could be present, this option can be checked.

3.1.3.7. 3PL

3PL inbound price

Defines the price to invoice 3PL partners for each received unit (*in inventory UoM*) of that item.

3PL outbound price

Defines the price to invoice 3PL partners for each –delivered unit (*in inventory UoM*) of that item.

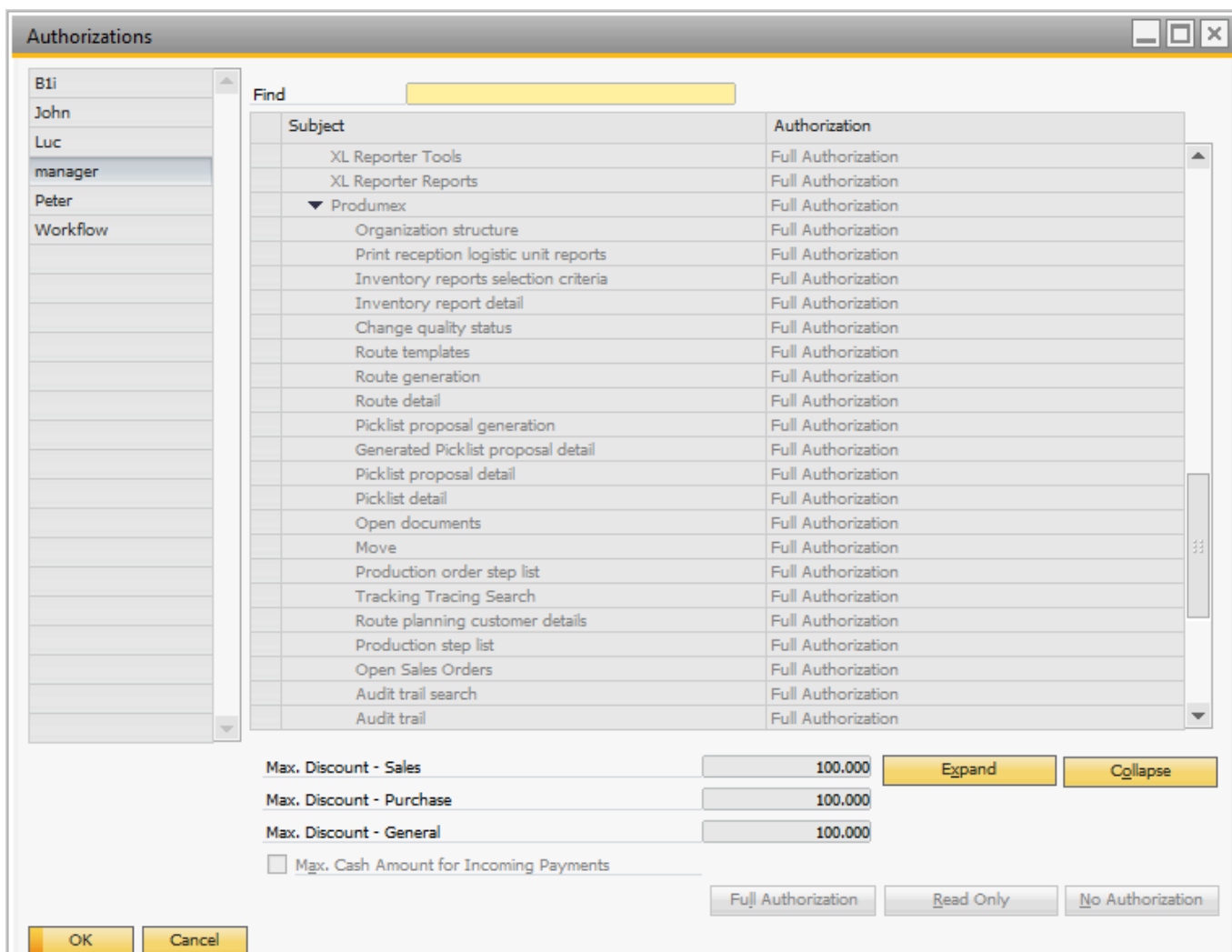
3.2. Administration

The Administration module of SAP Business one allows to define important general settings to ensure the proper functioning of the system. PDMX adds specific settings to these in the field of authorizations and users.

3.2.1. Authorizations

General authorizations for PDMX

At the user level it is possible to define the authorizations for the various functions of PDMX. An authorized user can define the rights of the individual users. In order to do this select Administration → System Initialization → Authorizations → General Authorizations.



An authorized user can then set the user authorization for PDMX as a whole or for the various parts of it. The authorization levels are:

- Full Authorization
- Read Authorization
- No Authorization

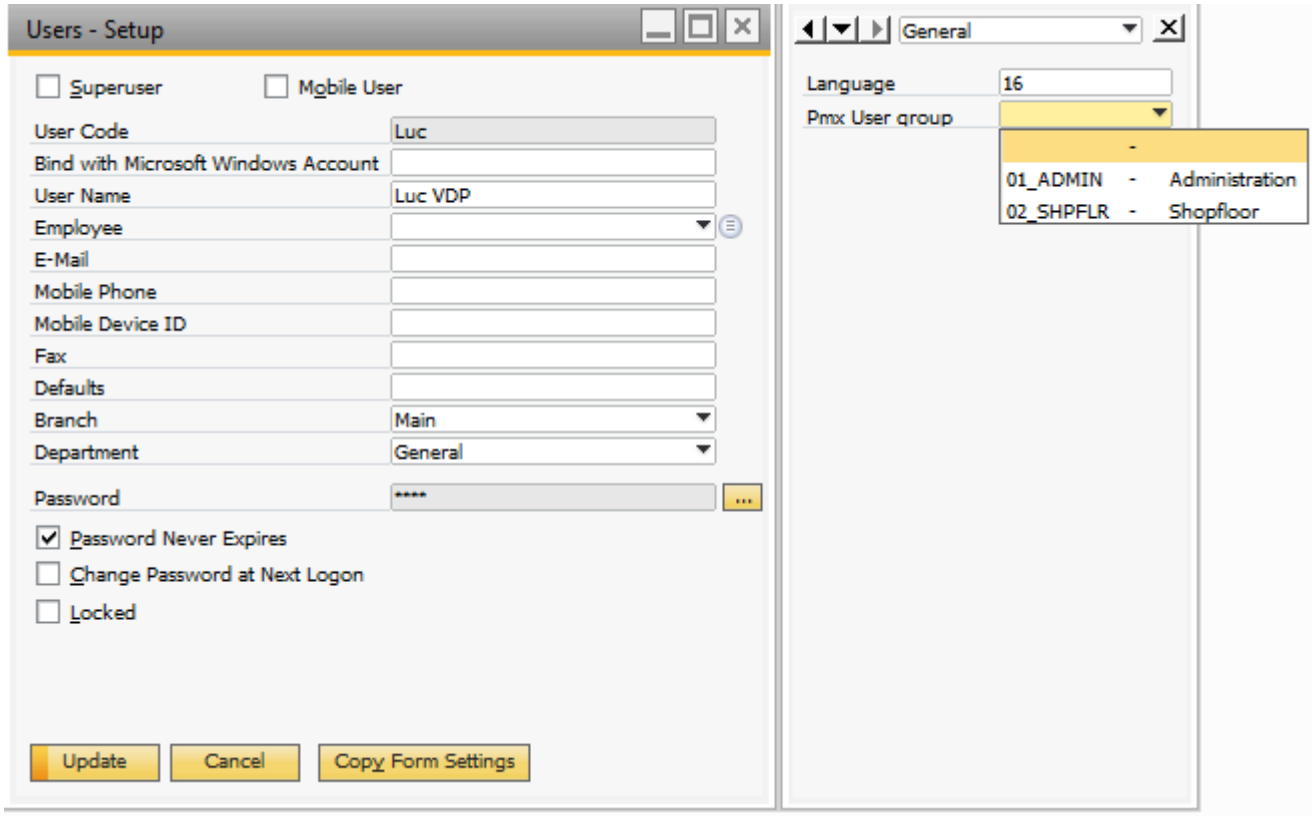
The various aspects to which the authorization levels apply are:

- Organization structure
- Print reception logistic unit reports
- Inventory reports selection criteria
- Inventory report detail
- Change quality status
- Route templates
- Route generation
- Route detail
- Picklist proposal generation
- Generated Picklist proposal detail
- Picklist proposal detail
- Picklist detail
- Open documents
- Move
- Production order step list
- Tracking Tracing Search
- Route planning customer details
- Production step list
- Open Sales Orders
- Audit trail search
- Audit trail
- Interface monitor
- Production manager
- Cycle count select location
- Cycle count processing
- Adjust packaging quantity
- Adjust manual locking
- Move order
- Manual interfacing
- Container
- Advance inventory locking
- Print SSCC
- Change BBD on batch
- Change Batch2 on batch

3.2.2. Users

Additional setting for users

- It is possible to set the language in which the “thin client” application runs for each individual users. To do this select Administration → Setup → General → Users. A user-defined field “Language” has been added there to allow you to set the language code for the user in question. This language is used on the scanner/touchscreen when the user has logged on.
- It is also possible to assign a user to a PMX User Group. The available authorizations are defined in the UDT “PMX_UAUT” (*User Authorizations Definitions Table*) and can be linked to the PMX User Groups (UDT “PMX_USGR”) through the UDT “PMX_UGAU” (*Link Usergroup To Authorizations Table*).



3.2.3. User defined tables

User defined tables data can be entered through: SAP Tools → *Default forms*

3.2.3.1. Shipping quality option (PMX_SQOP)

#	Code	Description
1	CAN_USE_SUQ	Released or SUQ
2	MUST_USE_SUQ	Shipping under quarantine
3	RELEASED	Released
4		

This lists the options for shipping quality.

The values are:

- CAN_USE_SUQ: All quality statuses that 'Can be shipped' and 'Can be shipped under quarantine' are allowed.
- MUST_USE_SUQ: Only quality statuses that 'Can be shipped under quarantine' are allowed.
- RELEASED: Only quality statuses that 'Can be shipped' are allowed.

It is allowed to delete an option if this is not needed. But changes to the code are not allowed. This is used on an SAP document line UDF (*Shipping quality option*) in combination with the pick list proposal creation.

3.2.3.2. Produmex pick list types (PMX_PLTY)

Pick list types are used on proposals and pick lists.

On a business partner there is also a default pick list type.

On a sales order/sales reserve invoice/warehouse transfer request a pick list type can be defined.

When creating a proposal, the system will set the pick list type in this order:

- Pick list type on business partner
- Pick list type on document
- Default pick list type

Configuration:

Code

The code.

Name

The name.

Split PL on item pick type?

When this is true, several pick list proposals can be created, grouping items with the same item pick type.

Split PL on item pick type 2?

When this is true, several pick list proposals can be created, grouping items with the same item pick type 2.

Ask weight?

When this is true, the weight of the logistic unit will be asked when the logistic unit is finished. The data will be stored on the PMX_LUID table.

Ask length?

When this is true, the length of the logistic unit will be asked when the logistic unit is finished. The data will be stored on the PMX_LUID table.

Ask width?

When this is true, the width of the logistic unit will be asked when the logistic unit is finished. The data will be stored on the PMX_LUID table.

Ask height?

When this is true, the height of the logistic unit will be asked when the logistic unit is finished. The data will be stored on the PMX_LUID table.

Full pallet pick list type

When this is set, the proposal that is created will be split up between full quantity (*This is a multiple of the default quantity defined on the item master data*) and partial quantity (*Item pick*). The proposal created for the full pallet will have this pick list type.

Item pick pick list type

When this is set, the proposal that is created will be split up between full quantity (*This is a multiple of the default quantity defined on the item master data*) and partial quantity (*Item pick*). The proposal

created for the item pick will have this pick list type.

Always status picked?

When this is true, the pick list line status after picking will always be 'Picked'. This means that when you pick without a moveable location, the status will not be 'Packed'. Pick lists with a type that have this setting, need to go through the 'Consolidated packing flow'. If any pick list within the same wave has this option, all pickings will follow this setting.

Use for production?

When this is true, the pick list can be used for pick lists of type 'Production'. When this is false, the pick list type can be used for shipping and warehouse transfer.

3.2.3.3. Produmex item pick types (PMX_IPIT)

This lists the possible item pick types. This is used on the item master data on fields 'Item pick type' and 'Item pick type 2'. This is only used in the 'Zone Picking' flow.

Configuration:

Code

The code.

Name

The name.

3.2.3.4. Produmex user item pick types (PMX_UIPT)

This table is to configure the item pick types a user can pick. If the user is not present in the list, he is allowed to pick all items. If the user is present in the list, he can only pick items with item pick types defined in the table.

Configuration:

Code

The code.

User code

The code of the user.

Item pick type

The item pick type. The item pick type can be selected from a list. The list comes from the 'Produmex Item pick types' UDT.

Item pick type property

The property on the item master data the current line refers to. Possible values:

- ItemPickType1: The item pick type on item master data.
- ItemPickType2: The item pick type 2 on item master data.

3.2.3.5. Produmex user pick list types (PMX_UPLT)

This table is to configure the pick list types a user can pick. If the user is not present in the list, he is allowed to pick all pick lists. If the user is present in the list, he can only pick from pick lists with pick list types defined in the table.

Configuration:

Code

The code.

User code

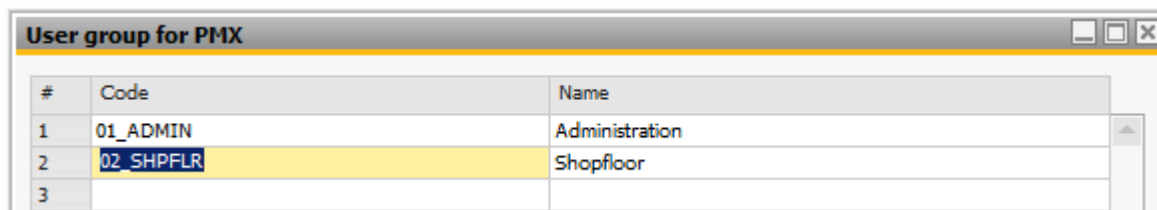
The code of the user.

Pick list type

The pick list type. The pick list type can be selected from a list. The list comes from the 'Produmex pick list types' UDT.

3.2.3.6. User group for PMX (PMX_USGR)

Definition of Produmex user groups. The user group can be linked to a user.



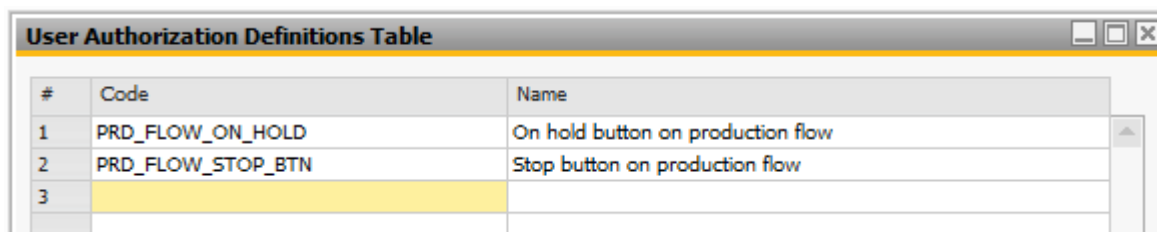
#	Code	Name
1	01_ADMIN	Administration
2	02_SHPFLR	Shopfloor
3		

There are already 2 predefined user groups.

- 01_ADMIN: Administration
- 02_SHPFLR: Shopfloor

3.2.3.7. User authorization definition (PMX_UAUT)

Definition of possible authorizations that can be set. This is system information. Do not adjust/delete the code.



#	Code	Name
1	PRD_FLOW_ON_HOLD	On hold button on production flow
2	PRD_FLOW_STOP_BTN	Stop button on production flow
3		

Possible values:

- PRD_FLOW_ON_HOLD: The 'on hold' button on the Production flow

- PRD_FLOW_STOP_BTN: The 'stop' button on the Production flow
- PROPOSAL_CLOSE_BUTTON: The close button to close pick list proposals (Open documents report, pick list proposal form, ...)
- PICK_LIST_CLOSE_BUTTON: The close button to close pick lists (Open documents report, pick list proposal form, ...)

3.2.3.8. Link usergroup to authorization(PMX_UGAU)

Define the authorization a user group can have.

Configuration:

Code

The code.

User code

The code of the user.

User group code

The user group code. The user group code can be selected from a list. The list comes from the 'User group for PMX' UDT.

User authorization code

The user authorization code. The user authorization code can be selected from a list. The list comes from the 'User authorization definition' UDT.

Value

The actual authorization. Possible values:

- Disabled
- Enabled
- Hidden

3.2.3.9. Link pack line to zone (PMX_LPLZ)

Defines the zone linked to pack lines. This is use on the 'Consolidated packing' flow.

The pick list destination location should be on that zone. Also the available stock to pack needs to be stored on that zone.

The level of the zone is 1. This means that the zone you define here needs to be the direct zone of the location.

Configuration:

Code

The code.

User code

The code of the user.

Code of the pack line

The code of the pack line, as define in the organizational structure.

Code of the zone

The code of the zone, as define in the organizational structure.

3.2.3.10. Box type for WAS (PMX_BTWA)

Definition of box types that can be used in the warehouse automation system (WAS).

Configuration:

Code

The code.

Name

The name.

Compartments

The number of compartments a box has.

3.2.3.11. Box for WAS (PMX_BFWA)

Definition of all boxes that can be used in the warehouse automation system (WAS).

Configuration:

Code

The code.

Name

The name.

Box type

The box type. The box type can be selected from a list. The list comes from the 'Box type for WAS' UDT.

3.2.3.12. Box type for item for WAS (PMX_BTIT)

If needed, it can be specified how much items in a certain box type can be stored.

Configuration:

Code

The code.

Name

The name.

Box type

The box type. The box type can be selected from a list. The list comes from the 'Box type for WAS' UDT.

Item code

The item code.

Quantity

The quantity of the item that can be stored in the given box type.

3.2.3.13. Down time types (PMX_DTTY)

List of down time types. This is used in the time registration module when entering a down time.

Configuration:

Code

The code.

Name

The name.

3.2.3.14. Pmx priority (PMX_PRIO)

The Produmex priorities. This is used on pick list (proposals) and move orders. The system has already 3 predefined priorities:

- High (100)
- Normal (200)
- Low (300)

Configuration:

Code

The code.

Name

The name.

Sequence

A number defining the order of the priority. The value needs to be unique. Order is done ascending. This means that 1 has a higher priority than 99.

Is default?

For the default priority this option should be set to true.

3.2.3.15. Produmex user warehouses (PMX_UWHS)

Here it can be defined what warehouses can be visible for a certain user. This is used on the RF terminals and Produmex screens in the administrative module (SAP). If the user is not present in the table, he can view data for all warehouses.

Configuration:

Code

The code.

User code

The code of the user.

SBO Warehouse

The SBO warehouse a user is allowed to view.

3.2.3.16. Produmex user item group (PMX_UITB)

Here it can be defined what item groups can be visible for a certain user. This is used on the RF terminals and Produmex screens in the administrative module (SAP). If the user is not present in the table, he can view data for all item groups.

Configuration:

Code

The code.

User code

The code of the user.

Item group

The item group a user is allowed to view.

3.2.3.17. Produmex cycle count - Other operations filter (PMX_COOF)

Cycle counting can be done during other operations. To have a more flexible way of configuring when such a cycle count can be performed, configuration settings can be defined in this table.

Configuration:

Code

The code.

[Days of the week]

Define whether the cycle count during other operations can occur or not on a certain day of the week.

Other operation type for cycle count

The type of operation where the cycle count can be performed. Possible values:

- Ad hoc picking - Transport (Pick list or route)
- Ad hoc picking - Customer collect.

- Picking

3.2.3.18. Freight charges definitions (PMX_FCDE)

Configuration of freight charges that will be added to a sales document.

Configuration:

Code

The code.

Name

The name.

Freight code

The line number of the freight to be added. The freight charges are added on a sales order when it is added. The line number must correspond to a line in the freight charges screen on sales order header:

#	Freight Name	Remarks	Tax Code	Total Tax Amount	Distrib. Method	Amount	Status	D
1	Freight		PA	0,00 \$	None	0,00 \$	○	
2	Insurance		PA	0,00 \$	None	0,00 \$	○	

Shipping type code

The shipping type code where this freight charge needs to be added.

Cost

The price to be added.

Min. document price

The minimum document price that is required to add the cost.

Example:

Freight code	Shipping type code	Cost	Min document price
1	1	30	0
1	1	20	100
1	1	0	200

If the price is between 0 and 99,999999, a cost of 30 will be added to Freight for shipping type 1
 If the price is between 100 and 199,999999, a cost of 20 will be added to Freight for shipping type 1
 If the price is above or equal to 200, no cost will be added to Freight for shipping type 1

3.2.3.19. Scale definition (PMX_SCLD)

Configuration of scales that can be used in Produmex RF terminals.

Configuration:

Code

The code.

Name

The name.

Linked object type

Data needed by the system for the current weighing object. Do NOT adjust values in this column.

Linked doc entry

Data needed by the system for the current weighing object. Do NOT adjust values in this column.

Linked line number

Data needed by the system for the current weighing object. Do NOT adjust values in this column.

Scale setting

Settings for the scale. What needs to be entered here is depending on the scale.

Scale provider type

Provider type for the scale. What needs to be entered here is depending on the scale.

Scale setting

Settings for the scale.

Instance ID

The instance ID

Max. Weight

The maximum weight the scale can handle.

Nr. of decimals

The number of decimals the weight is captured in.

3.2.3.20. Defines the weighing scales available to a specific thin-client (PMX_TCSC)

Links a scale to a thin client.

Configuration:

Code

The code.

Name

The name.

Thin client code

The code of the thin client, as defined in the organizational structure.

Scale def. code

The scale definition code. This can be selected from a list. The list comes from the 'Defines the weighing scales available to a specific thin-client' UDT.

3.2.3.21. Seveso (PMX_SEVE)

Defines a seveso class, to hold the maximum quantity allowed on a warehouse. This class can be linked to an item.

Configuration:

Code

The code.

Name

The name.

Max. Quantity

The maximum quantity.

3.2.3.22. Produmex item serial number format (PMX_ISFT)

A list of possible serial number formats. This can be linked to item master data.

Configuration:

Code

The code.

Name

The name.

Serial format

The format a serial number must have. This is a regular expression (regex).

3.2.3.23. List of warehouse to warehouse where serial numbers need to be entered (PMX_WSMM)

Defines whether a PMX serial number needs to be asked when performing a move between warehouses.

Configuration:

Code

The code.

Name

The name.

From warehouse (PMX)

The source warehouse. This is the code of the warehouse as defined in the organizational structure.

To warehouse (PMX)

The source warehouse. This is the code of the warehouse as defined in the organizational structure.

Ask serial number?

Do serial numbers need to be asked?

Print documents?

Do warehouse documents need to be printed?

3.2.3.24. List of selectable trailer numbers (PMX_TRNR)

A list of known trailer numbers that can be selected during shipping process.

Configuration:

Code

The code.

Name

The name.

3.2.3.25. License plate (PMX_LIPL)

A list of known license plates that can be selected during shipping process.

Configuration:

Code

The code.

Name

The name.

3.2.3.26. Drivers (PMX_DRIV)

A list of known drivers that can be selected during shipping process.

Configuration:

Code

The code.

Name

The name.

3.2.3.27. Links between 'GS1 units of measurement' (PMX_LUMT)

This is not used.

3.2.3.28. Location types (PMX_LOTY)

A list of location types. These types can be selected on the organizational structure - location.

Configuration:

Code

The code.

Name

The name.

3PL item code

For 3PL invoicing only. The code of the item that will be used on the A/R invoices sent to the 3PL customers. The price of one day of storage in each location of that location type is represented by the 3PL item's price.

The item must be non-inventory.

3PL active?

For 3PL invoicing only. If disabled, the price for this location type will not be included in the A/R invoices sent to the 3PL customers.

3.2.3.29. Expiry definition (PMX_EXDE)

A list of possible expiry definitions. This is used to calculate best before dates.

Configuration:

Code

The code.

Name

The name.

Days

The number of days to add.

Months

The number of months to add.

Years

The number of years to add.

3.2.3.30. List of actions for certain events (PMX_EVAC)

Defines actions that can be performed for certain events.

Possible events:

- Open extra documents when another print job within SAP is performed.

This print job needs to be for Sales quotation/order/invoice.

It will get documents defined on the item master data in the column defined.

Configuration:

- Table name = OITM
- Colum name = [a column name within OITM where the path to the document that needs to be opened is stored]
- Object type = The object type for Sales quotation/order/invoice
- Action type = Does not need to be filled
- For event = Does not need to be filled

Configuration:

Code

The code.

Name

The name.

Table name

The name of the table.

Column name

The column name.

For event

Defines the event this action is for.

Action type

The type of action that needs to be performed.

Object type

The object type.

3.2.3.31. Batch attribute types (PMX_BATT)

Configuration:

Code

The code.

Name

The name.

Convertor

The data is stored in the database as text. The system needs to know what type to convert it to.

This can be set with the convertor.

Possible values:

- Int
- String
- Date
- Double
- List

Sequence

The sequence the batch attributes should be shown when entering the data. This is used to sort the batch attributes. This can be any numeric value.

The key for translation

The key that will be used for the translation of the title. When this is not set, the system will use MSG_TITLE_BATCH_ATTRIBUTE.<Code of the batch attribute>. In case there is only 1 language in the company, a title can be entered here directly.

A list of possible batch attributes that can be linked to an item.

Some predefined codes have been added:

- COUNTRY_OF_ORIGIN: Country of origin
- MANUFACTURING_DATE: Manufacturing date

When custom batch attribute types are added, a translation should be added to the system. This translation is used on a device when entering the batch attributes.

The translation node for COUNTRY_OF_ORIGIN looks like:

```
<PmxLocalizationKey>
  <Canceled>False</Canceled>

<LocalizationKey>MSG_TITLE_BATCH_ATTRIBUTE.COUNTRY_OF_ORIGIN</LocalizationKey>
  <ApplicationTypeCode>SLIM_SCR</ApplicationTypeCode>
  <LocalizationProperties>
    <PmxLocalizationProperty>
      <Canceled>False</Canceled>
      <LocalizationProperty />
      <ExtensionCode>CONVSTR</ExtensionCode>
      <LocalizationValues>
        <PmxLocalizationValue>
          <Canceled>False</Canceled>
          <LocalizationValue>Enter the country of
origin</LocalizationValue>
          <LanguageCode>3</LanguageCode>
        </PmxLocalizationValue>
        <PmxLocalizationValue>
          <Canceled>False</Canceled>
          <LocalizationValue>Vul het land van herkomst
in</LocalizationValue>
          <LanguageCode>16</LanguageCode>
        </PmxLocalizationValue>
      </LocalizationValues>
    </PmxLocalizationProperty>
  </LocalizationProperties>
</LocalizationKey>
```

```
</LocalizationValues>
</PmxLocalizationProperty>
</LocalizationProperties>
</PmxLocalizationKey>
```

The LocalizationKey starts with 'MSG_TITLE_BATCH_ATTRIBUTE.'
Add the code of the attribute type at the end.

When making a complete valid translation file to import, make sure the root tags are also added:

```
<?xml version="1.0" encoding="utf-8"?>
<TestRoot>
</TestRoot>
```

3.2.3.32. Batch attribute valid values (PMX_BAVV)

A list of possible values a batch attributes type can have.

Configuration:

Code

The code.

Name

The name.

Batch attribute type

The batch attribute type. This is a link to the table PMX_BATT (See page 45)

Value

The possible value for the batch attribute type

3.2.3.33. Quality types (PMX_QUTY)

This is the configuration of quality types that can be asked during certain processes. The recorded values are stored in the table PMX_QUVA.

Supported flows:

- Reception
- Bulk reception
- Production
- Production receipt
- Disassembly

Configuration:

Code

The code.

Name

The name.

Convertor

The data is stored in the database as text. The system needs to know what type to convert it to. This can be set with the convertor.

Possible values:

- Int
- String
- Date
- Double
- List

Document type

The document object type for this quality type. This is the ObjType from SAP.

For the moment only Purchase delivery (=20) and production order (202) are supported.

Remarks

Additional remarks. This is just informational.

Sequence

The sequence the quality type should be shown when entering the data. This is used to sort the quality types. This can be any numeric value.

Moment of capture

The moment of capture: When does this quality type need to be asked?

Possible values:

- Start
- End

The key for translation

The key that will be used for the translation of the title. When this is not set, the system will use MSG_TITLE_QUALITY_TYPE.<Code of the quality type>.

In case there is only 1 language in the company, a title can be entered here directly.

When custom quality types are added, a translation should be added to the system. This translation is used on a device when entering the quality values.

The translation node for TEMP_TRUCK looks like:

```
<PmxLocalizationKey>
  <Canceled>False</Canceled>
  <LocalizationKey>MSG_TITLE_QUALITY_TYPE.TEMP_TRUCK</LocalizationKey>
  <ApplicationTypeCode>SLIM_SCR</ApplicationTypeCode>
  <LocalizationProperties>
    <PmxLocalizationProperty>
      <Canceled>False</Canceled>
      <LocalizationProperty />
      <ExtensionCode>CONVSTR</ExtensionCode>
      <LocalizationValues>
        <PmxLocalizationValue>
```

```
<Canceled>False</Canceled>
  <LocalizationValue>Enter the temperature of the
truck</LocalizationValue>
  <LanguageCode>3</LanguageCode>
</PmxLocalizationValue>
<PmxLocalizationValue>
  <Canceled>False</Canceled>
  <LocalizationValue>Vul de temperatuur in van de
vrachtwagen</LocalizationValue>
  <LanguageCode>16</LanguageCode>
</PmxLocalizationValue>
</LocalizationValues>
</PmxLocalizationProperty>
</LocalizationProperties>
</PmxLocalizationKey>
```

The LocalizationKey starts with 'MSG_TITLE_QUALITY_TYPE.'
Add the code of the attribute type at the end.

When making a complete valid translation file to import, make sure the root tags are also added:

```
<?xml version="1.0" encoding="utf-8"?>
<TestRoot>
</TestRoot>
```

AI
The GS1 application identifier (AI) linked to this batch attribute. On the flows batch attributes can be entered, based on the batch attributes linked to an item. When a GS1 barcode has been scanned, and a batch attribute needs to be entered with an AI, the system will check if this AI is available in the scanned barcode. If so, this value will be used and the user will not have to manually enter a value for this batch attribute.

3.2.3.34. Quality type valid values (PMX_QUVV)

A list of possible values a batch attributes type can have.

Configuration:

Code

The code.

Name

The name.

Sequence

The sequence of the valid value in the list. This is used to sort the values to select from.

Quality type

The quality type. This is a link to the table PMX_QUTY (See page 48)

Value

The possible value for the quality type

3.2.3.35. Allergen types (PMX_ALLE)

A list of possible values an allergen can have.
This is used on the item master data to select an allergen.

Configuration:

Code

The code.

Name

The name.

3.2.3.36. Shelf life per country and business partner (PMX_CSSL)

A list of default shelf lives per business partner and country.
These shelf lives are taken into account for items where no shelf life per business partner and country is defined on the item master data. They have however precedence over the general shelf lives defined on the item master data.
You can enter a shelf life for either just a customer, or just a country, or a combination of both a customer and a country.

Configuration:

Code

The code.

Name

The name.

Country code

The country code (from table OCRY).

Card Code

The card code of the business partner.

Shelf life

The shelf life in days.

3.2.4. Business partner master data

The screenshot shows the 'Business Partner Master Data' configuration window in SAP. At the top, there are input fields for Code, Name, Foreign Name, Group, Currency, and Federal Tax ID. A 'BP Currency' dropdown is on the right. Below these are 'Orders' (0.00) and 'Opportunities' fields. A tabbed interface below includes 'General', 'Payment Terms', 'Payment Run', 'Accounting', 'Produmex', and 'Remarks'. The 'Produmex' tab is active, showing 'S/P remarks pop-up' (unchecked), 'Sales/Purchase remarks' (text area), 'Group sales delivery' (set to 'Take setting on company'), 'Linked Business Partner', and 'Picklist type'. A 'Reception' section has several checkboxes: 'Enter Specific Pallet nr', 'Has no logistic carriers', 'Has no logistic labels', 'Has no identical logistic units?', and 'Never delivers mixed logistic units'. At the bottom are 'Find', 'Cancel', and 'You Can Also' buttons.

S/P remarks pop-up

If checked, the text in the Sales/Purchase remarks is shown as a pop-up when using this business partner in a sales/purchase document in SAP.

Sales/Purchase remarks

The Sales/Purchase remarks to be shown when selecting the business partner in a purchase document in SAP.

Group sales delivery

If various orders for a customer have been entered and picked, it is possible to group the various orders in one sales delivery (Y) or to have a sales delivery per individual order (N). It is also possible to base this setting on the extension parameter "Sales delivery note generator" at the company level in the organization structure.

Linked Business Partner

In a third party logistics context, a supplier can be linked to a customer so that a purchase order to the supplier can be linked to a sales order to the customer.

Pick list type

In case a default pick list type applies to a business partner, this can be indicated here. When a proposal is created, it will set a pick list type in this order:

- On business partner
- On document
- Default pick list type

Enter specific pallet number?

If checked, a supplier pallet number needs to be entered during reception. This is stored on the table (PMX_LUID) where the SSCC is stored.

If for certain business partners you use that business partner's own pallets (*meaning that these have to be traceable within your company*), you can indicate that upon receipt of such a pallet, the pallet number has to be registered.

Has no logistic carriers

If checked, the screen to select a logistic carrier will be skipped during the reception process

Has no logistic labels

If checked, the screen to scan the logistic label will be skipped during the reception process

Has no identical logistic units

If checked, the screen to choose between identical and non identical logistic units will be skipped during the reception process

Never delivers mixed logistic units?

If checked, the screen to add more items to the logistic unit will be skipped during the reception process

3.2.5. Shipping types

Produmex has extended the shipping types.

Configuration for pick list/proposals, creation of delivery documents, ... can be done here.

When creating proposals, the goods on the sales document can be split up in several proposals, according to settings defined on the shipping type on document line level

Automatic shipping?

If checked, the system will try to automatically create a delivery when the pick list is packed. This setting is taken in account for splitting document lines into several proposals.

Automatic invoicing?

If checked, the system will try to automatically create an invoice when the delivery is made. This setting is taken in account for splitting document lines into several proposals.

The automatic invoicing is only supported for deliveries made by an RF terminal.

Mail report on document add

If checked, a report will be mailed when the document is added. This requires the SBO Notification listener to be installed, and configured to perform the mailing.

Is customer coming to collect?

If checked, the proposal/pick list that is generated will have the setting that it is for a customer collect to true. This setting is taken in account for splitting document lines into several proposals.

Ask license plate during shipping?

If checked, system will ask for a license plate when performing the shipping. This overrules the setting on global level.

Ask driver name during shipping?

If checked, system will ask for a driver name when performing the shipping. This overrules the setting on global level.

Ask trailer number during shipping?

If checked, system will ask for a trailer number when performing the shipping. This overrules the setting on global level.

Ask tracking number during shipping?

If checked, system will ask for a tracking number when performing the shipping. If it is configured to have multiple deliveries created when shipping (multiple) pick lists, only 1 tracking number is asked, and stored on all deliveries.

3.3. Production

3.3.1. BOM

Is base component

Is the current ingredient the base component of the product to produce? (*Informational*)

This is also used in combination with the 'Scan base component' option on item master data.

During picking the user will be asked to scan the barcode of this base component when picking the master item.

Has to be lined up

Does this component need to be consumed from a lined up location?

Qty tolerance %

The tolerance (percentage) of the quantity of components to consume. This will allow the system deviate from the theoretical quantity needed for the production.

Is the item optional

Set whether the component is optional. If set to true, this component is not required to produce.

Prod. Order start condition

- No condition
- Component on input
- Component weighed

These are the start conditions of a production order. The requirements need to be met, before the production order can be started.

Best before date option

This is used when picking for production. It configures the way the system should calculate a valid best before date for the ingredient. Possible values:

- BBD of finished product and shelf life: Take the BBD defined on the production order + shelf life of the ingredient.
- Due date and shelf life: Take the due date of the production order + shelf life of the ingredient
- Pick date: Take the date when the picking occurs or in case of pick lists for production the creation date of the proposal.

3.3.2. Production order header

Produmex production status

Next to the status of SAP, there is the Produmex production status.

Possible values: Planned, On hold, Started, Closed

Production step list

Next to the item to produce, the user can select a steplist.

The requirements to select a steplist:

- One or more steplists for the item to produce needs to be configured
- The production type needs to be 'Special'

When a step list is selected, a list of components is created according to the selected steplist. Step list functionality will be explained below.

Production line

Next to the warehouse, the user can select the production line where this production order needs to be produced. Only the production lines in the warehouse are shown.

3.3.3. Production order lines

The extra fields added to the BOM, are also added to the production order. When creating a new production order, the Produmex add-on will copy the data from the BOM to the production order in case the UDF's are named the same.

The following fields are used for picking for production: *(And not for Pick List for production)*

Quantity picked

The quantity that already has been picked for this component.

Batch(es) to pick

If a certain batch needs to be picked for this production order, this column needs to be filled with the batch to pick.

3.3.4. Production issue lines

Is waste?

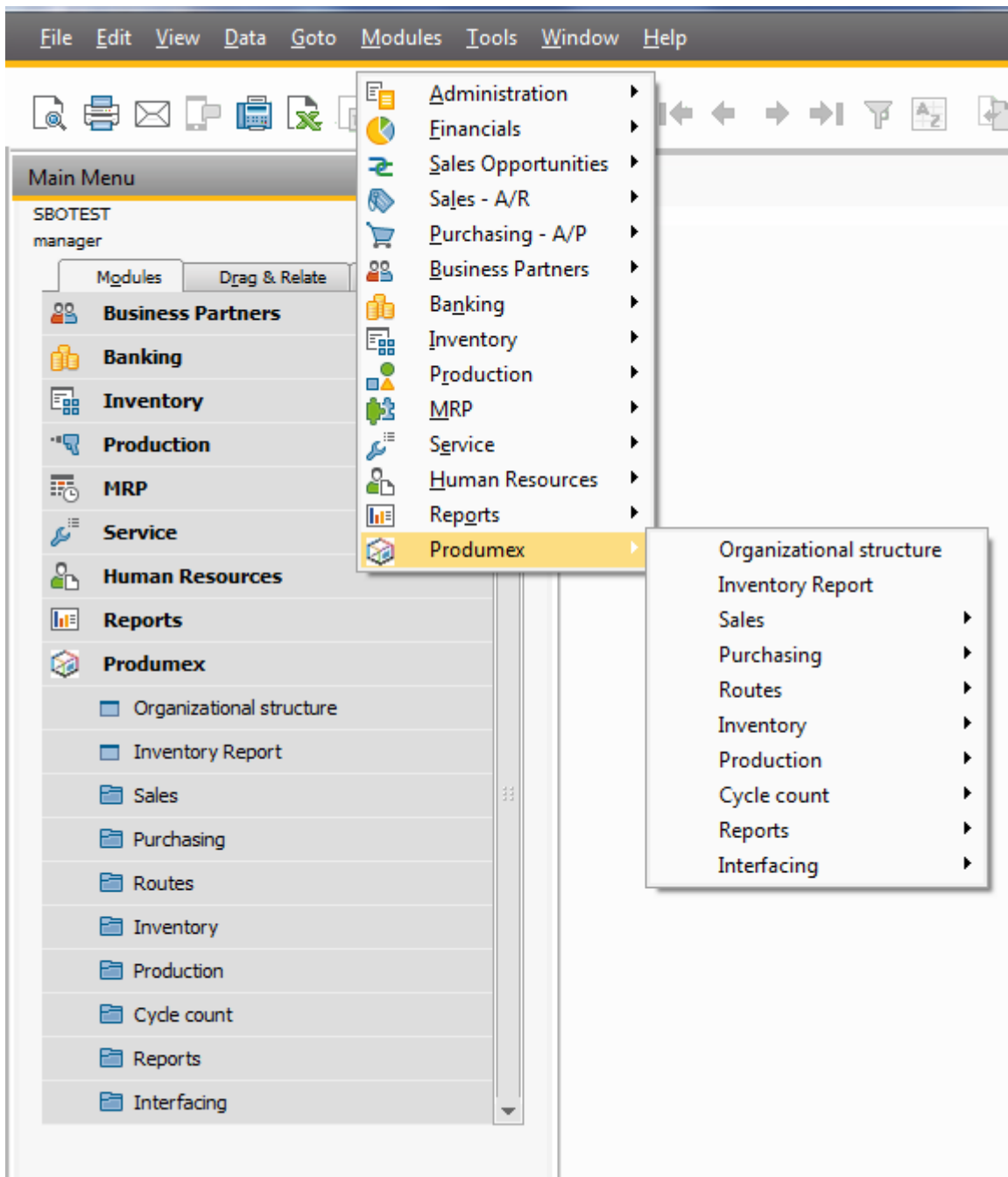
Is this line registered as waste?

The production batch

This stores the production batch this line was issued for.

4. Produmex Office Module

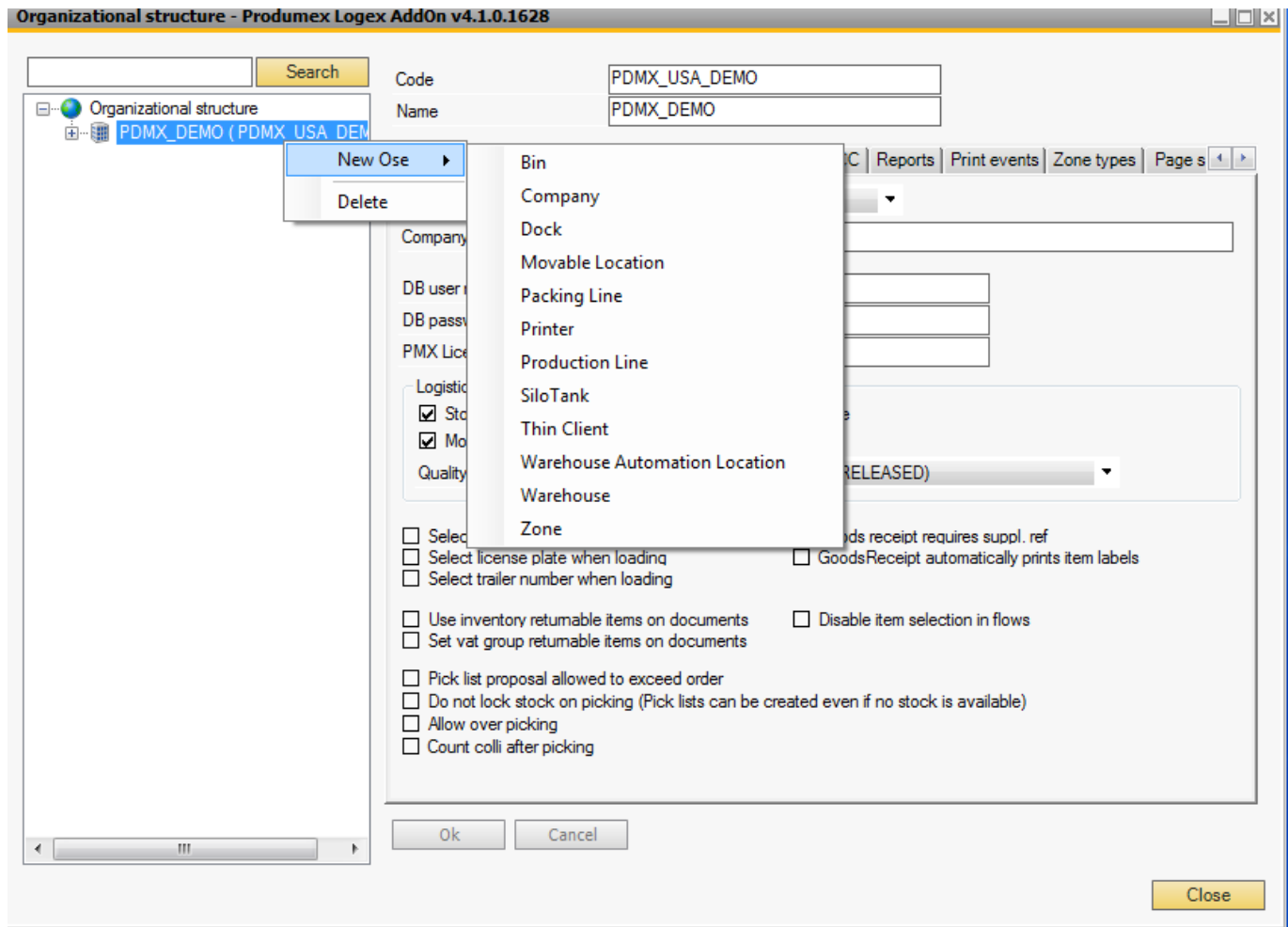
Apart from the extension of existing SAP Business One functions, PDMX offers specific administrative functions for streamlining the operational processes of goods receipt, put away, production, packaging, picking and shipping. These functions are grouped under the Produmex tab in the main menu of SAP Business One. You can also access these functions by way of the menu option Module where you can then select the option Produmex at the bottom.



5. Organizational Structure

Before you can start using PDMX you have to define the structure of your company. Here you define how your company is organized in practice.

In the main screen of the organization structure you can start by adding and arranging the various structure elements in your company.



These OSE's (Organization Structure Elements) are (in hierarchic order):

- **Company:** this OSE can only be created once per company database
- **Warehouse:** this is the highest level below a company. Warehouse not only refers to the place where goods are received, stored and from which they are shipped. The warehouse can also be the location where goods are transformed (manufactured or packaged). A warehouse in PDMX must always be linked to a warehouse in SAP Business One.
- **Zone:** a specific area in the warehouse where certain functions are grouped (e.g. goods receipt, shipping, packaging, ...)
- **Production line:** a line where goods are produced and packaged (as part of a warehouse)
- **Packing line:** a line where goods that were picked on a movable location can be packed onto a logistic carrier to be shipped as a logistic unit
- **Dock:** a location where goods are received and/or shipped (as part of a warehouse)
- **Warehouse Automation Location** - an automated warehouse (mini load) that manages input and output of items automatically. PDMX does not manage the individual locations (boxes) in the automated warehouse but keeps track of the inventory in on a global level.

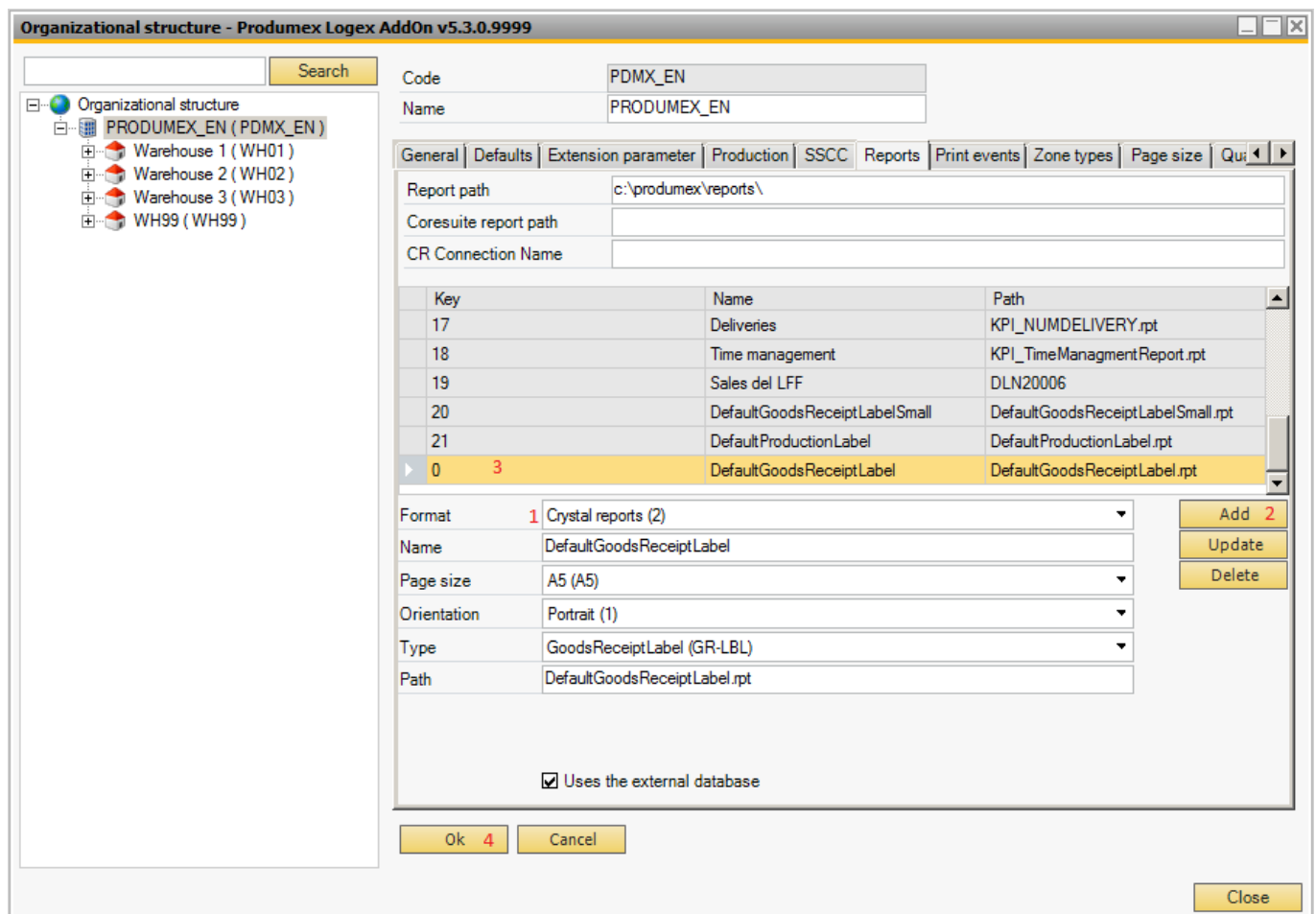
- Bin: an individual storage location managed by PDMX.
- Silo Tank: a fixed bulk storage location
- Movable Location: a movable storage location (e.g. a picking cart) on which goods are temporarily stored after picking before they are packed on a logistics carrier or used in production (e.g. a forklift).
- Thin Client: a fixed or mobile operator station (touch screen, handheld terminal, ...), by which the operator interacts with PDMX
- Printer: a printer at a specific location or connected to a specific thin client

5.1. Organizational Structure Settings at Company Level

All the data on several tab pages can be changed within the tab page itself. When a change has been made, the OK button (*Number 4*) will be enabled.

It is only when clicking the OK button (*4*) the changes are committed to the database.

An example to add a report:



1. Enter the configuration of the report.
2. Click the Add button to add the new report to the list.
3. The report is added, but has as key = 0, because it is not committed to the database yet.
4. Click OK button to add the changes to the database.

5.1.1. General settings

At the company level a number of general settings can be specified that apply to the entire PDMX Add-On.

The screenshot shows a dialog box titled "Organizational structure - Produmex Logex AddOn v4.1.0.1628". On the left is a tree view showing the organizational structure with "PDMX_USA_DEMO" selected. The main area is the "General" tab, which contains the following fields and options:

- Code: PDMX_USA_DEMO
- Name: PDMX_DEMO
- Language: Dutch (16)
- Company logo URL: (empty)
- DB user name: sa
- DB password: (masked with dots)
- PMX License Server: localhost
- Logistic carriers section:
 - Store logistic carriers on 1 storage location by warehouse
 - Move all logistic carriers on reception
 - Quality status for logistic carriers: Released (RELEASED)
- Other options (all unchecked):
 - Select driver when loading
 - Select license plate when loading
 - Select trailer number when loading
 - Use inventory returnable items on documents
 - Set vat group returnable items on documents
 - Pick list proposal allowed to exceed order
 - Do not lock stock on picking (Pick lists can be created even if no stock is available)
 - Allow over picking
 - Count colli after picking
 - Goods receipt requires suppl. ref
 - GoodsReceipt automatically prints item labels
 - Disable item selection in flows

Buttons for "Ok", "Cancel", and "Close" are visible at the bottom.

Language

This includes the standard language (the language that is used by default on the thin clients, unless specified otherwise at the individual user level (cfr. Administration → Users)).

Logo

Furthermore a reference to the company logo can be added: this path points to a shared folder which contains the company logo that is used on the login page of the thin clients.

DB credentials

The standard connection to the SAP Business One database (username / password). Needs to be set for reporting purposes.

Logistic carriers

Next it is also possible to define whether logistic carriers (pallets, containers, ...) are stored at one location per warehouse (where they are stored after emptying) and what the standard quality status for logistic carriers is.

Transport services

In case the company uses transport services, it is also possible to indicate whether the name of the driver has to be specified or selected when loading and/or whether the license plate and/or the trailer

number of the transport vehicle should be recorded.
These global settings can be overruled on the SAP Shipping types.

Goods receipt requires suppl. ref

If this parameter is checked, the operator will be asked to enter a supplier reference number during the goods reception process.

Goods receipt automatically prints item labels

When this is ticked, the goods receipt on scanner will automatically print item labels. The number of labels printed, is the received number of items. Otherwise the user will be asked if he wants to print.

Use inventory returnable items on documents

If this is ticked, the returnable item added to the document will be the inventory item.

Set vat group returnable items on documents

If this is ticked, the VAT group of the returnable item will be set when added to the document. For purchase this will be OITM.VatGroupPu and for sales this will be OITM.VatGourpSa.

Check to add returnable items

When this is ticked, the system will try to add returnable items when booking a document. To avoid this check this can be unticked.

Disable item selection in flows

If this is ticked, it will not be possible to select an item on scanner/touchscreen. The user will always have to scan a barcode to identify the item.

Pick list proposal allowed to exceed order

If ticked, it is possible to adjust the quantity of the proposal, so it exceeds the ordered quantity.

Do not lock stock on picking (pick lists can be created even if no stock is available)

When proposals are made, stock is locked. If this is ticked, the system will not lock stock when creating the proposal. This means that there is no more check of available quantity, so proposals can be made, even if there is not enough quantity.

Picking can only happen through the 'Ad hoc picking' flow.

Allow over picking

If "Allow over picking" is checked, the operator will be able to pick more items than specified in the sales order/picklist. This can be done for convenience purposes, e.g. if an order for 14 items is received and the packaging unit for that item is a box of 15 items. In such a case, picking a whole box may be more convenient than opening the box and taking one item out.

This option is only available for Picking, Zone picking and Multi picking, Ad hoc picking - route, Ad hoc picking - pick list.

Count colli after picking

As a further check to ensure the correctness of deliveries, it can be specified that the operator has to count and enter the number of colli that were picked and put onto a logistic unit (SSCC), which the operator wishes to finish. The system will then verify whether this number is the same as the number of colli it has recorded during the picking process onto this logistic unit (SSCC). The count is done in the inventory UoM.

When this is ticked, it can be configured how many times the user can enter an incorrect count.

When this maximum is reached, the picked SSCC is considered unpicked, and a new pick list is created for these items, forcing the user to pick again.

Embed .NET forms in SBO forms

When this option is set, all forms run within SAP.

But in some cases it is useful if some screens are not embedded in SAP. In that case it is possible when you have 2 monitors to move certain screens outside of SAP on another monitor.

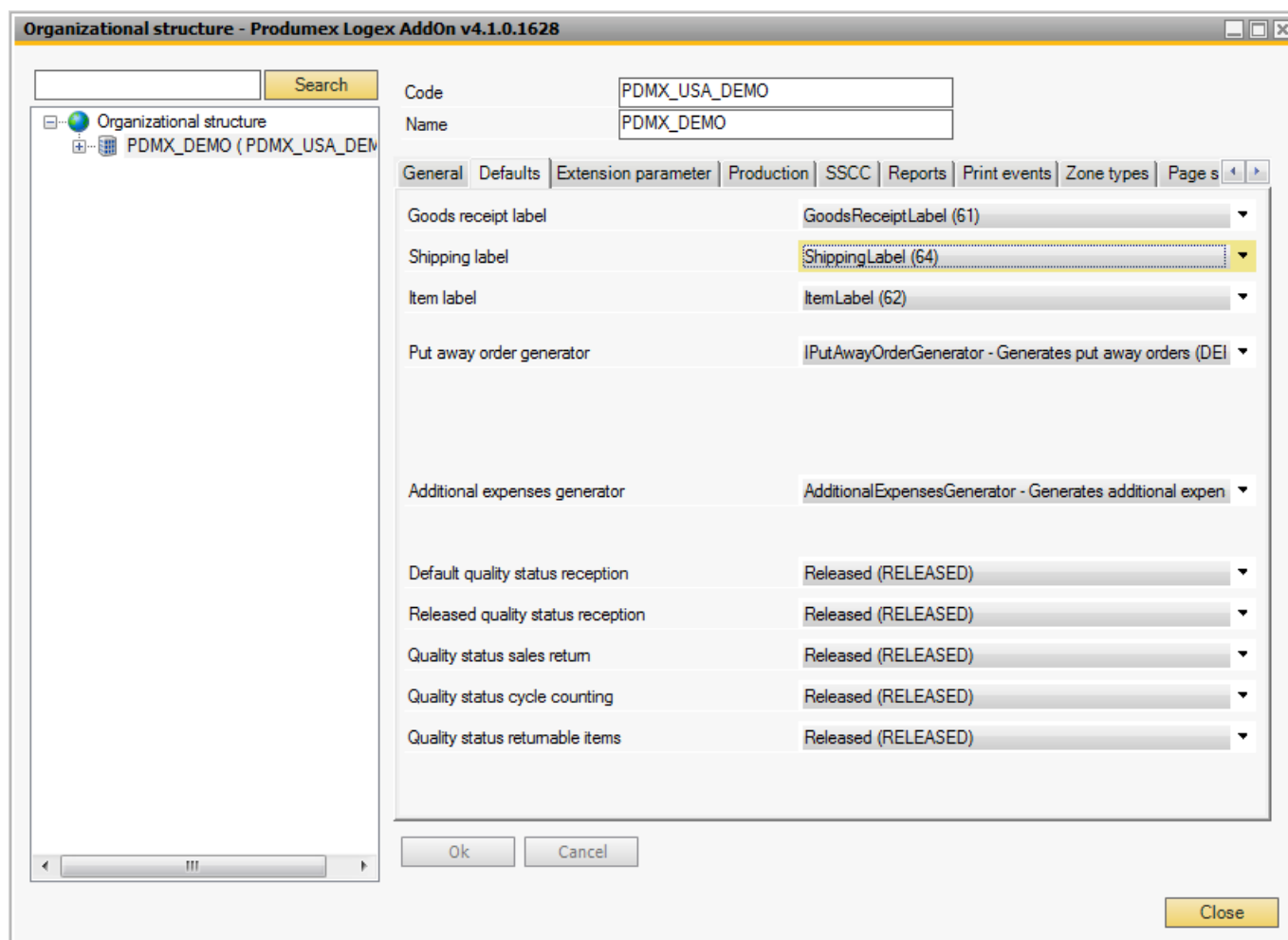
This can be done by unchecking this checkbox.

Some screens will be shown in the Windows taskbar, and will be outside of SAP.

Supported screens:

- Organizational structure
- Route planning
- Production manager
- Cycle count - Select location
- Cycle count - Process

5.1.2. Defaults



Labels

In the default settings you can specify the standard labels for goods receipt, shipping and the standard item label.

Put away generator

How received goods (*logistic units - SSCC*) have to be put away. The options are:

- **Generates full pallet put away orders**

For these put away orders, the user will always have to move the full SSCC to a location. The SSCC cannot be split up.

- **Generates NO put away orders**

If no put away orders are needed, this option can be selected.

- **Generates put away orders**

This is the default put away generator. This will generate the order. When processing the order, the user can select if he wants move the full SSCC or not for monolot pallets. Mixed pallets will have to be split up.

Additional expenses generator:

This setting is used to copy additional expenses like for example freight costs from a sales order/line to a sales delivery. The way the costs get divided on the base documents depend on the configuration within SAP. Produmex does not handle this.

Default quality status reception

The default quality status for goods receipt.

This option can be overruled by settings on the item master data.

Released quality status reception

This setting is related to the setting "default quality status reception". The setting defines the quality status of a lot number that is released in inventory. For example an item with a lot number is received in inventory with a quality status of quarantine (default quality status reception), if the item and lot number changed of quality status to released and the item with the same lot number is again received into inventory it will retrieve the quality status defined in the setting "Released quality status reception".

This option can be overruled by settings on the item master data.

Quality status sales return

The default quality status for sales return.

This option can be overruled by settings on the item master data.

Quality status cycle counting

Defines the default status of items that are added to the inventory (*Inventory Transaction* → *Goods Receipt*) as a result of Cycle Counting (*when a positive difference has been established between the actual physical stock in the warehouse and the administrative stock that was registered in SAP Business One*). This quality status only applies to additional items that are NOT on an existing logistic unit (SSCC) in the system. Additional items that are counted on an existing logistic unit get the quality status of that logistic unit.

Quality status returnable items

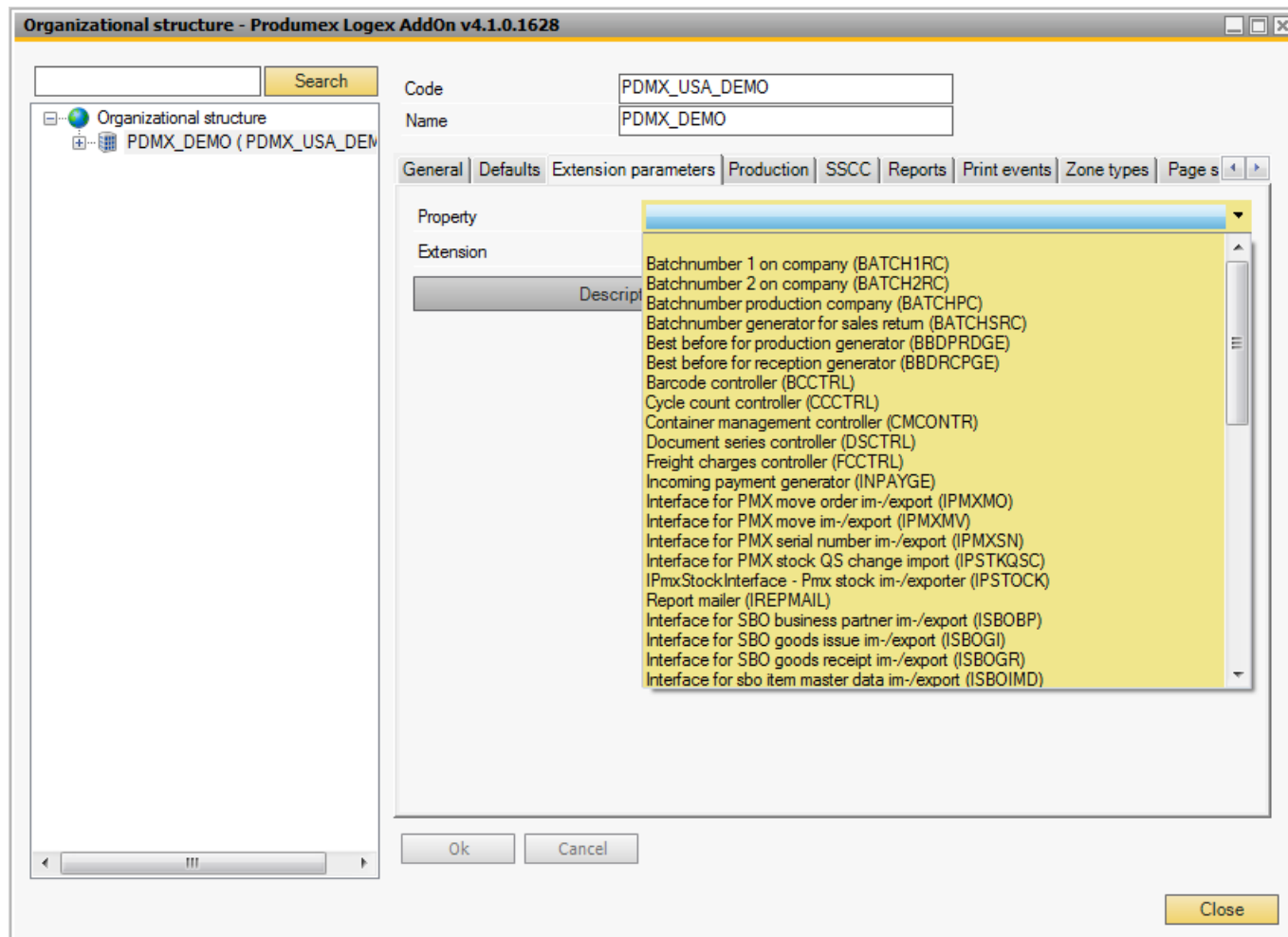
The default quality status for returnable items.

This is used when inventory returnable items need to be added to the system.

5.1.3. Extension Parameters

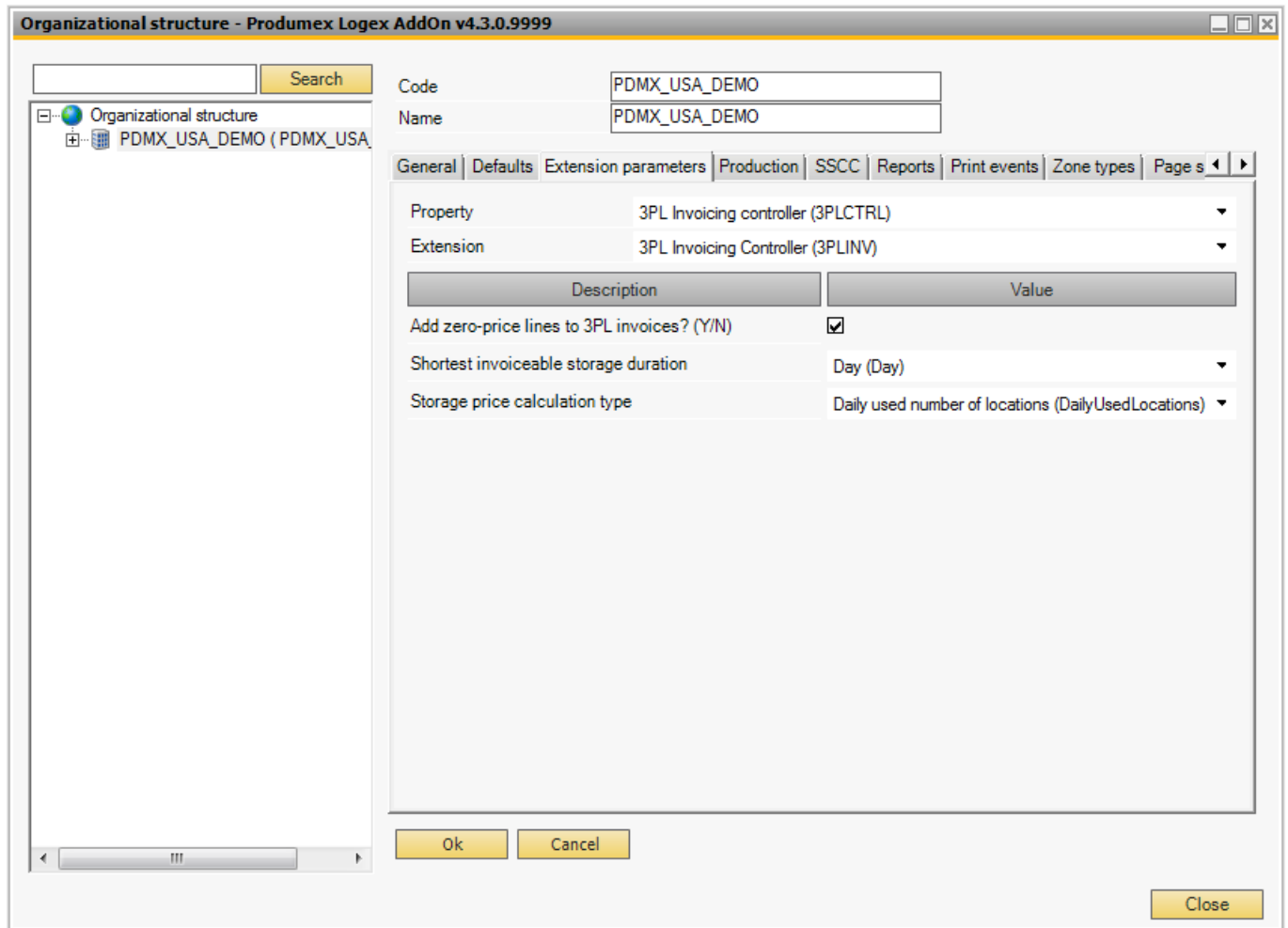
General

In the “Extension Parameters” tab, it is possible to define a number of parameters for certain properties. This is how you configure the system to behave in certain processes. These properties and the applicable extension parameters are:



5.1.3.1. 3PL invoicing controller

3PL Invoicing Controller (3PLINV)



Add zero-price lines to 3PL invoices? (Y/N)

Option to whether or not include price with a calculated price or zero to the 3PL invoices.

Shortest invoiceable storage duration

Defines the minimum duration to be invoiced when a bin location is used by an item.
Possible values:

- ‘Day’: if a bin location is used by an item on one day, invoice the daily storage price or that bin location one time
- ‘Week’: if a bin location is used by an item on any day of a week, invoice the daily storage price of that bin location for the whole week
- ‘Month’: if a bin location is used by an item on any day of a month, invoice the daily storage price of that bin location for every day of the month

Storage price calculation type

Defines the way to calculate the storage price for bin locations.
Possible values:

- ‘Daily used number of locations’: every bin location that has contained a supplier item will be considered as having been used for storage, and will be included in the storage price calculation
- ‘Daily final stock’: only the bin locations that contain an item of the supplier at the end of each day will be considered as having been used for storage, and will be included in the storage price calculation

5.1.3.2. Batchnumber 1 on company

Generates batch number for reception based on format (BGRF)

The screenshot shows the configuration interface for 'Batchnumber 1 on company (BATCH1RC)'. The 'Code' is PDMX_USA_DEMO and the 'Name' is PDMX_DEMO. The configuration table is as follows:

Description	Value
Can the user change the generated batch number?	<input checked="" type="checkbox"/>
The current sequential number	0
The date format to reset sequential number	yy
The format	[DayOfYear:3][Date:yy]
The update date for sequential number	13

Can the user change the generated batch number? (Y/N)

Option to whether or not the user will be able to change the generated batch number during the reception process.

The current sequential number

Field that holds the current sequential number.

The date format to reset sequential number

Defines the date format on what the sequential number will be reset. In the example above the sequential number will be reset when the year changes.

The format

Defines the format of the generated batch numbers.

A tag starts with '[' and ends with ']'. Inside a tag the first part is the identifier of the type of value that needs to be entered. Next is a ':' to split the identifier and the value of the identifier.

Possible tags in the format:

[Date:yyMMdd] or [D:yyMMdd]

Date: This will be replaced by the date format provided in the value of the identifier. All windows allowed formats are allowed. It will perform the method `DateTime.ToString(string value)` of Windows.

[DayOfYear:3] or [DY:3]

Date: This will be replaced by the day of year. The value indicates the minimum length the processed value should have. The fill character is '0'. So if the day of year is 99, and value is 3, the processed value will be 099.

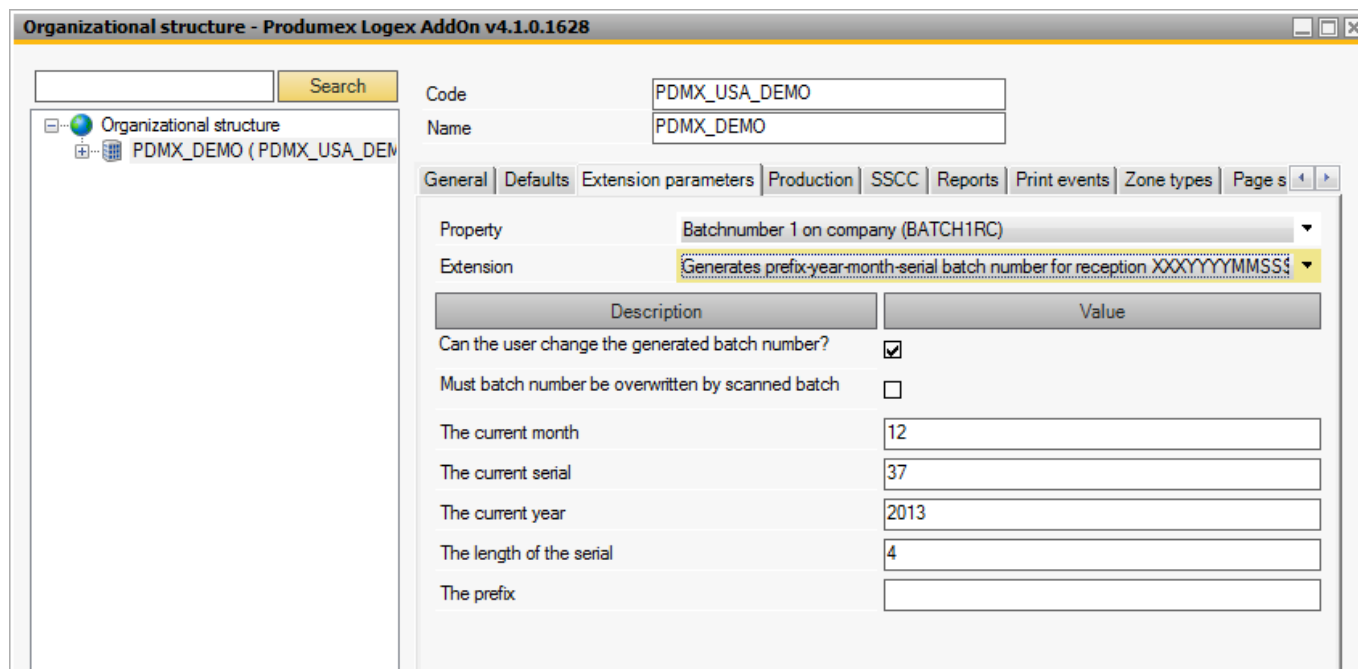
[X:4]

Sequential number: This will be replaced by the sequential number. The value indicates the minimum length the processed value should have. The fill character is '0'. So if the sequential number is 99, and value is 4, the processed value will be 0099.

The update date for sequential number

The last update date in the specified format. This is used to know when the sequential number needs to be reset.

Generates prefix-year-month-serial batch number for reception XXXYYYYMMSSSSS



Can the user change the generated batch number? (Y/N)

Option to whether or not the user will be able to change the generated batch number during the reception process.

Must batch number be overwritten by scanned batch number of GS1 label? (Y/N)

Can the entered batch number be overwritten by the batch number that is present in the barcode on the GS1 label (if any) of the received items.

The current month

Field that holds the current month.

The current serial

Field that holds the current serial number.

The current year

Field that holds the current year.

The length of the serial

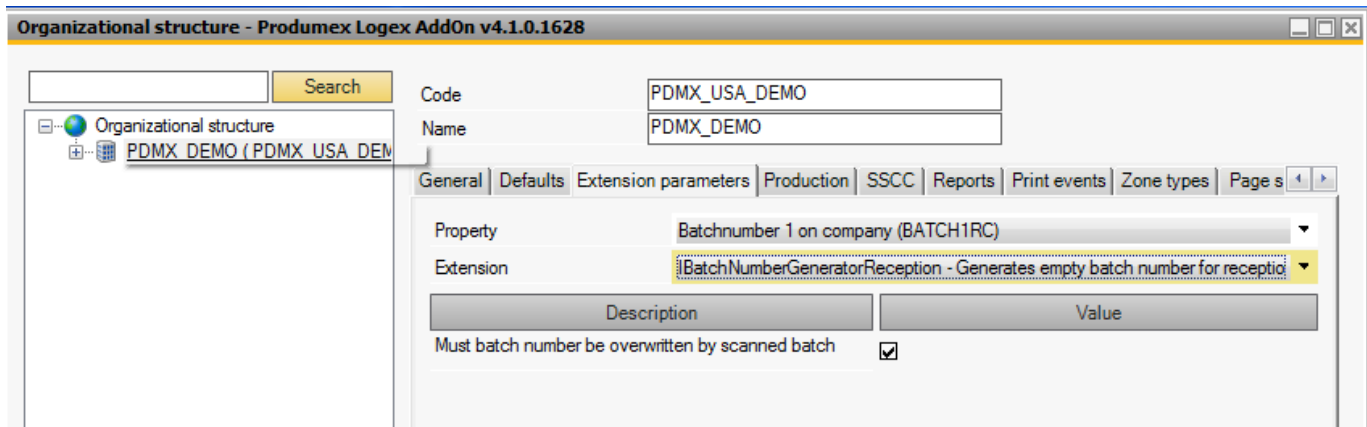
Defines the length of the serial number

The prefix

Defines the prefix of the generated batch number.

BatchNumberGeneratorReception - Generates empty batch number for reception

The user will have to enter the batchnumber manually.



Must batch number be overwritten by scanned batch number of GS1 label? (Y/N)

Must the entered batch number be overwritten by the batch number that is present in the barcode on the GS1 label (if any) of the received items.

BatchNumberGeneratorReception - Generates year-serial batch number for reception YYYYSSSSS



Generates an automatic batch number based on the specified criteria: i.e. year + serial number of a specific length. It can furthermore be defined whether or not the user will be able to change the generated batch number.

Can the user change the generated batch number? (Y/N)

Option to whether or not the user will be able to change the generated batch number during the reception process.

The current serial

Field that holds the current serial number.

The current year

Field that holds the current year.

The length of the serial

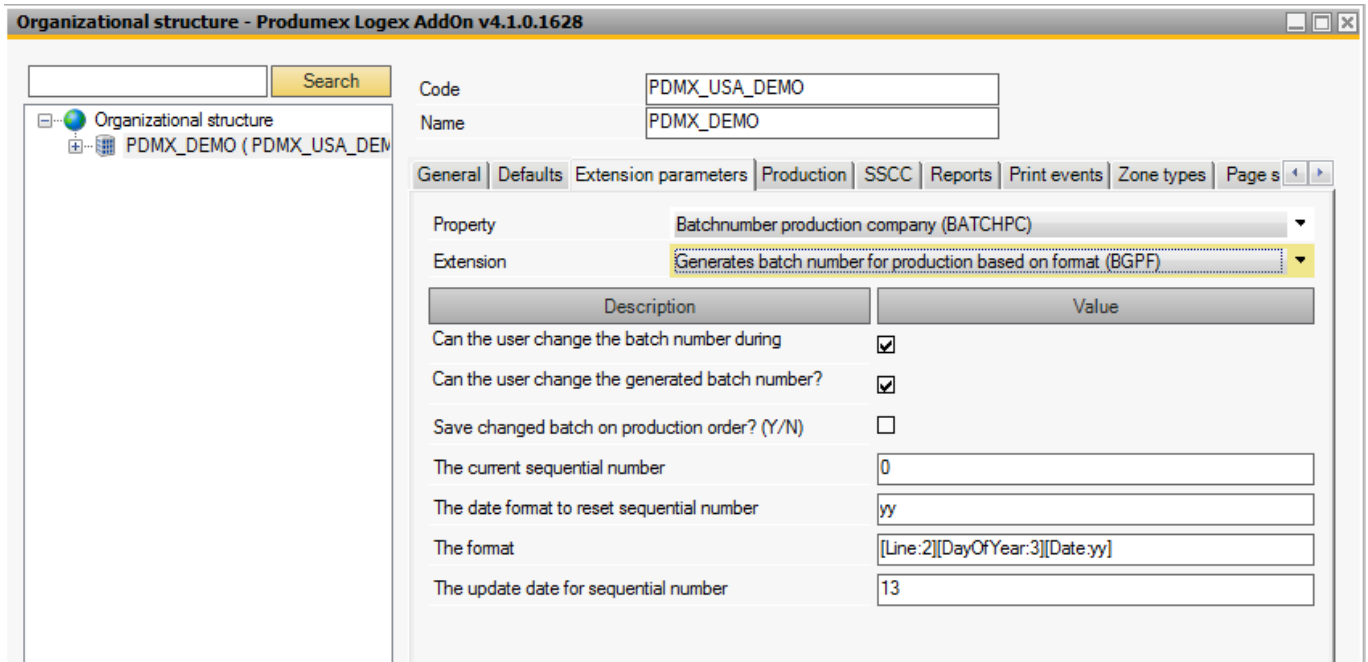
Defines the length of the serial number

5.1.3.3. Batchnumber 2 on company

Identical to batch number 1

5.1.3.4. Batchnumber production company

Generates batch number for production based on format



Can the user change the batch number during production? (Y/N)

Option to whether or not the user will be able to change the generated batch number during the production process.

Can the user change the generated batch number? (Y/N)

Option to whether or not the user will be able to change the generated batch number.

Save changed batch on production order? (Y/N)

This option defines if the changed batch number needs to be saved on the production order or not.

The current sequential number

Field that holds the current sequential number.

The date format to reset sequential number

Defines the date format on what the sequential number will be reset. In the example above the sequential number will be reset when the month changes.

The format

Defines the format of the generated batch numbers.

A tag starts with '[' and ends with ']'. Inside a tag the first part is the identifier of the type of value that needs to be entered. Next is a ':' to split the identifier and the value of the identifier.

Possible tags in the format:

[Date:yyMMdd] or [D:yyMMdd]

Date: This will be replaced by the date format provided in the value of the identifier. All windows allowed formats are allowed. It will perform the method DateTime.ToString(string value) of Windows.

[DayOfYear:3] or [DY:3]

Date: This will be replaced by the day of year. The value indicates the minimum length the processed value should have. The fill character is '0'. So if the day of year is 99, and value is 3, the processed value will be 099.

[L:2] or [Line:2]

Production line: This will be replaced by the name of the production line linked to the production order. The value indicates the length of the processed value. The system will take the first part of the production line name, until the required length.

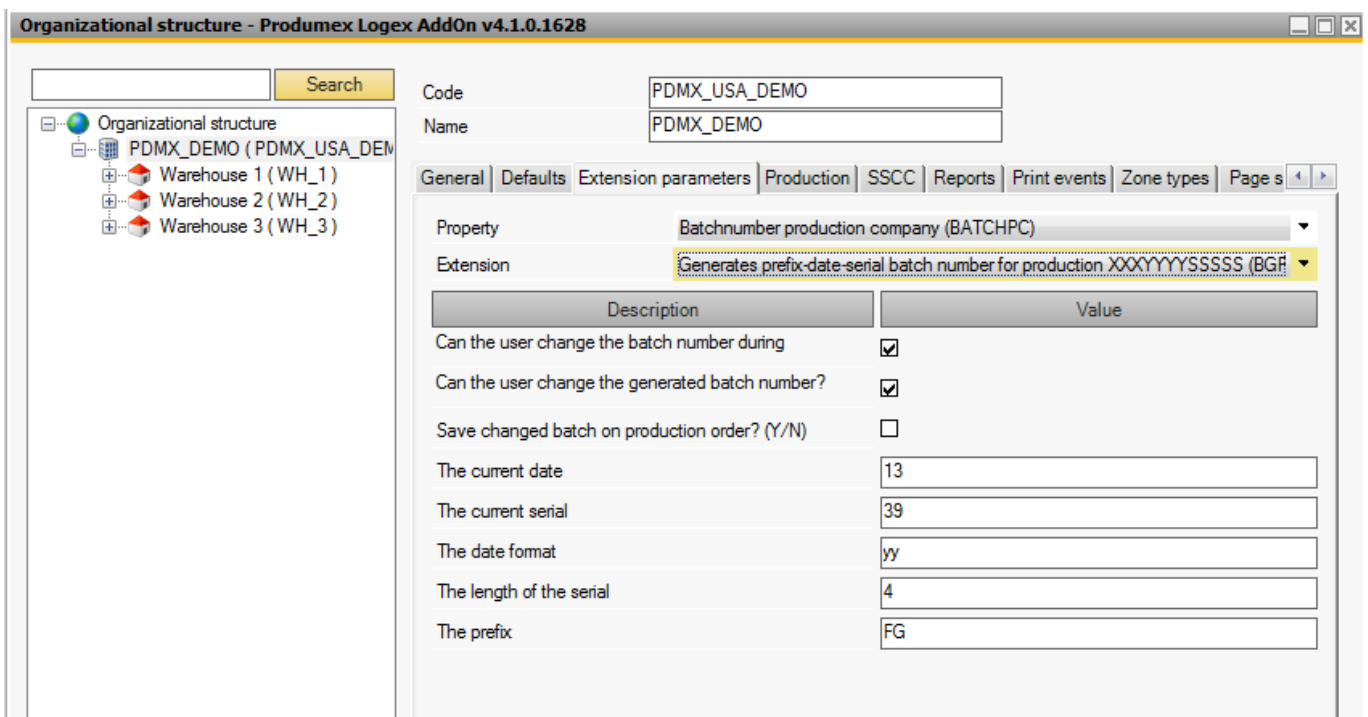
[X:4]

Sequential number: This will be replaced by the sequential number. The value indicates the minimum length the processed value should have. The fill character is '0'. So if the sequential number is 99, and value is 4, the processed value will be 0099.

The update date for sequential number

The last update date in the specified format. This is used to know when the sequential number needs to be reset.

Generates prefix-year-month-serial batch number for production XXXYYYYMMSSSSS



Can the user change the batch number during production? (Y/N)

Option to whether or not the user will be able to change the generated batch number during the production process.

Can the user change the generated batch number? (Y/N)

Option to whether or not the user will be able to change the generated batch number.

Save changed batch on production order? (Y/N)

This option defines if the changed batch number needs to be saved on the production order or not.

The current date

Field that holds the current date, based upon the defined date format below. i.e.: date format = yyyy, the current date will be 2013.

The current serial

Field that holds the current serial number.

The date format

Field that holds the date format, based upon this the current date is stored and calculated.

The length of the serial

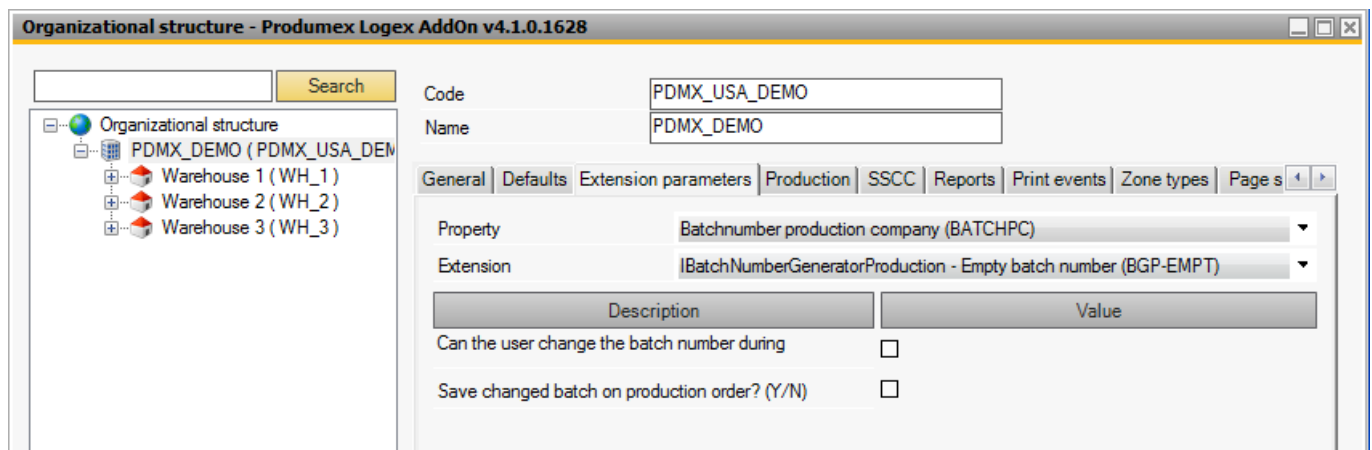
Field that holds the length of the serial number.

The prefix

Field that holds the prefix of the batch number.

BatchNumberGeneratorProduction - Empty batch number

The user will have to enter the batch number manually.



Can the user change the batch number during production? (Y/N)

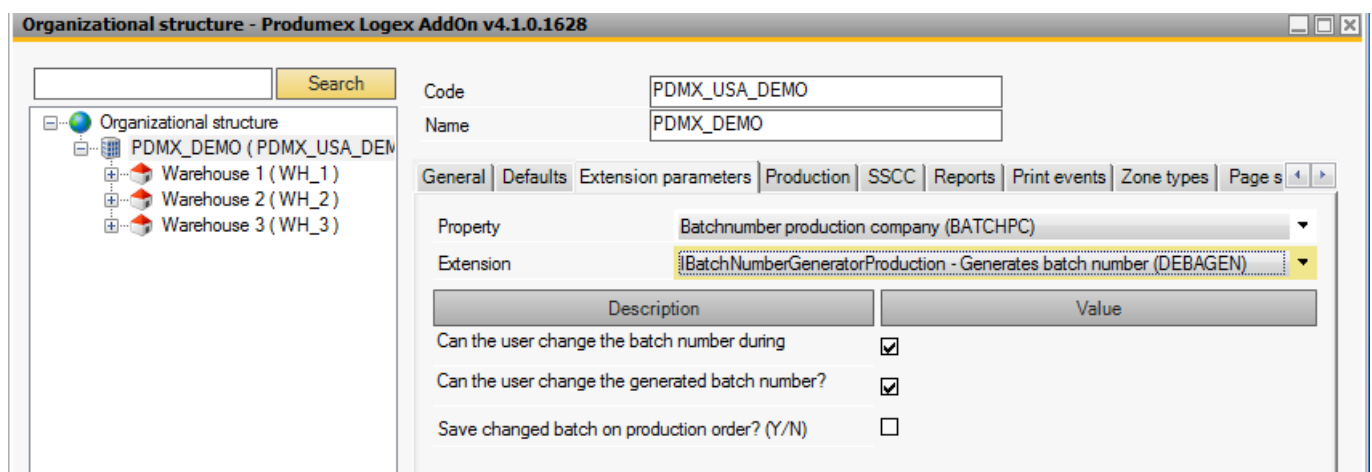
Option to whether or not the user will be able to change the batch number during the production process.

Save changed batch on production order? (Y/N)

This option defines if the changed batch number needs to be saved on the production order or not.

BatchNumberGeneratorProduction - Generates batch number

The format is: yy-[DayOfYear]-[ProductionOrderNumber]



Can the user change the batch number during production? (Y/N)

Option to whether or not the user will be able to change the generated batch number during the production process.

Can the user change the generated batch number? (Y/N)

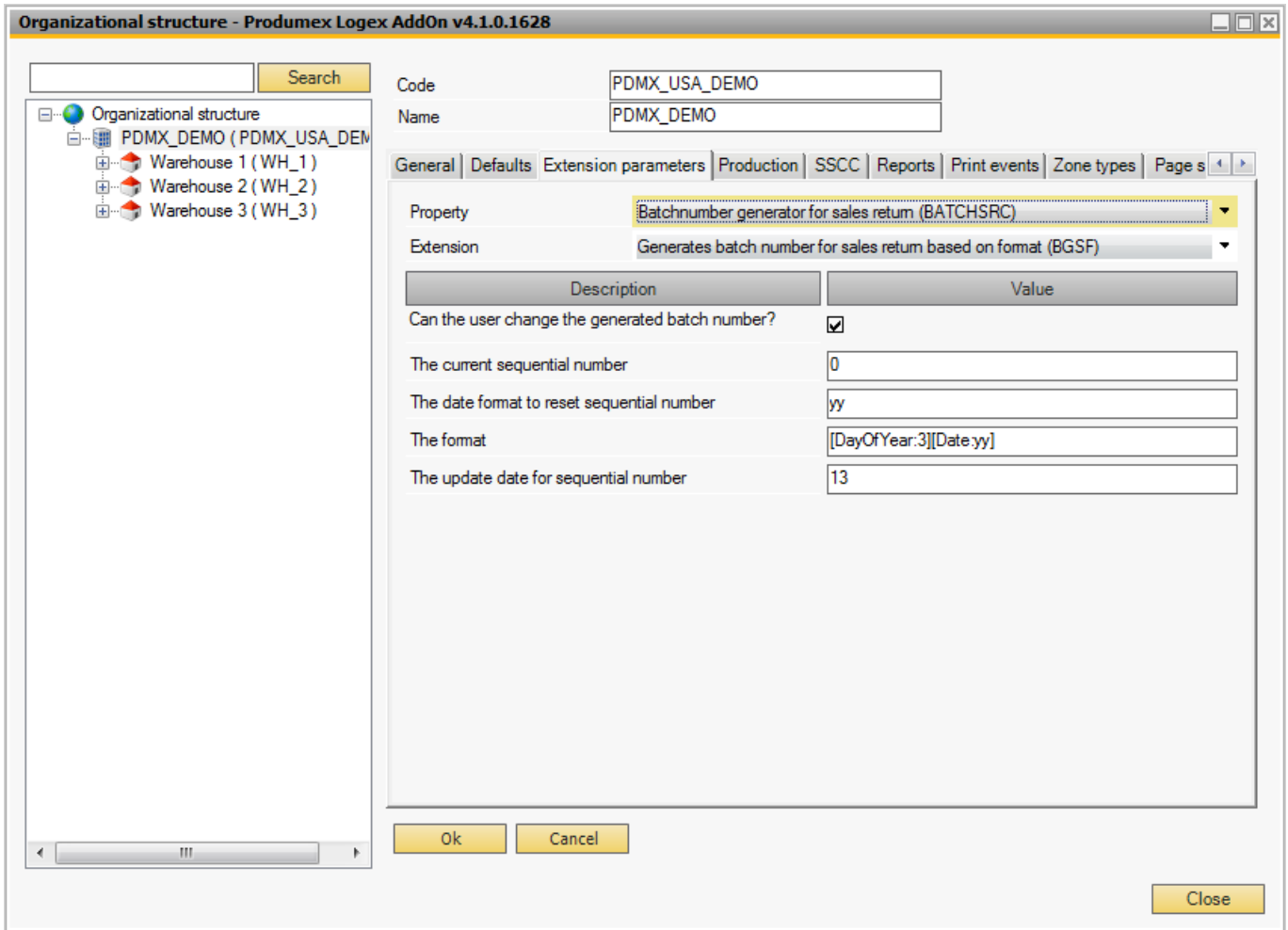
Option to whether or not the user will be able to change the generated batch number.

Save changed batch on production order? (Y/N)

This option defines if the changed batch number needs to be saved on the production order or not.

5.1.3.5. Batchnumber generator for sales return

Generates batch number for sales return based on format



Can the user change the generated batch number? (Y/N)

Option to whether or not the user will be able to change the generated batch number during the production process.

The current sequential number

Field that holds the current serial number.

The date format to reset sequential number

Defines the date format on what the sequential number will be reset. In the example above the sequential number will be reset when the month changes.

The format

Defines the format of the generated batch numbers.

A tag starts with '[' and ends with ']'. Inside a tag the first part is the identifier of the type of value that needs to be entered. Next is a ':' to split the identifier and the value of the identifier.

Possible tags in the format:

[Date:yyMMdd] or [D:yyMMdd]

Date: This will be replaced by the date format provided in the value of the identifier. All windows allowed formats are allowed. It will perform the method `DateTime.ToString(string value)` of Windows.

[DayOfYear:3] or [DY:3]

Date: This will be replaced by the day of year. The value indicates the minimum length the processed value should have. The fill character is '0'. So if the day of year is 99, and value is 3, the processed value will be 099.

[X:4]

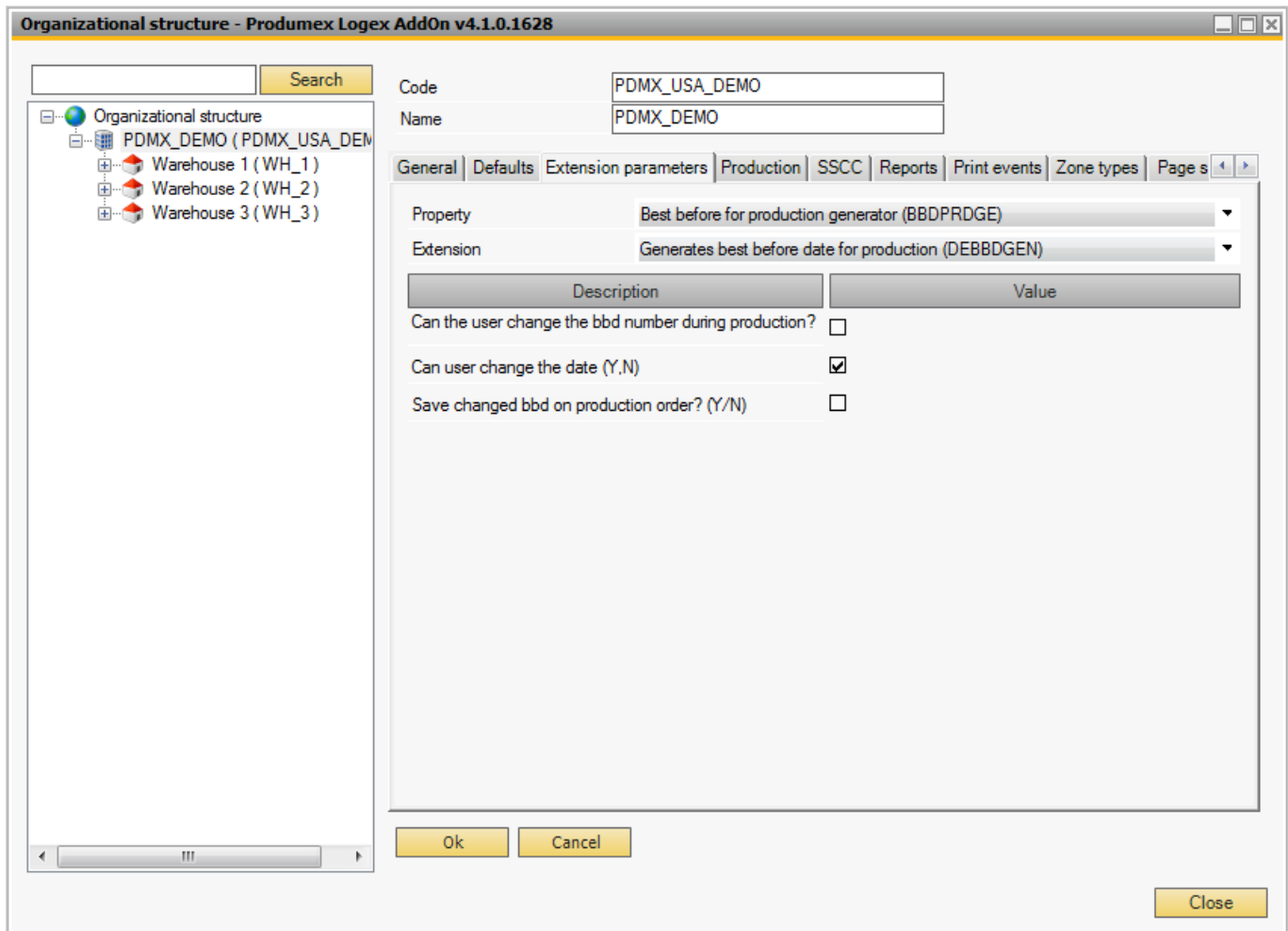
Sequential number: This will be replaced by the sequential number. The value indicates the minimum length the processed value should have. The fill character is '0'. So if the sequential number is 99, and value is 4, the processed value will be 0099.

The update date for sequential number

The last update date in the specified format. This is used to know when the sequential number needs to be reset.

5.1.3.6. Best before for production generator

Generates best before date for production



Can the user change the bbd number during production? (Y/N)

Option to whether or not the user will be able to change the generated best before date during the production process.

Can user change the date (Y,N)

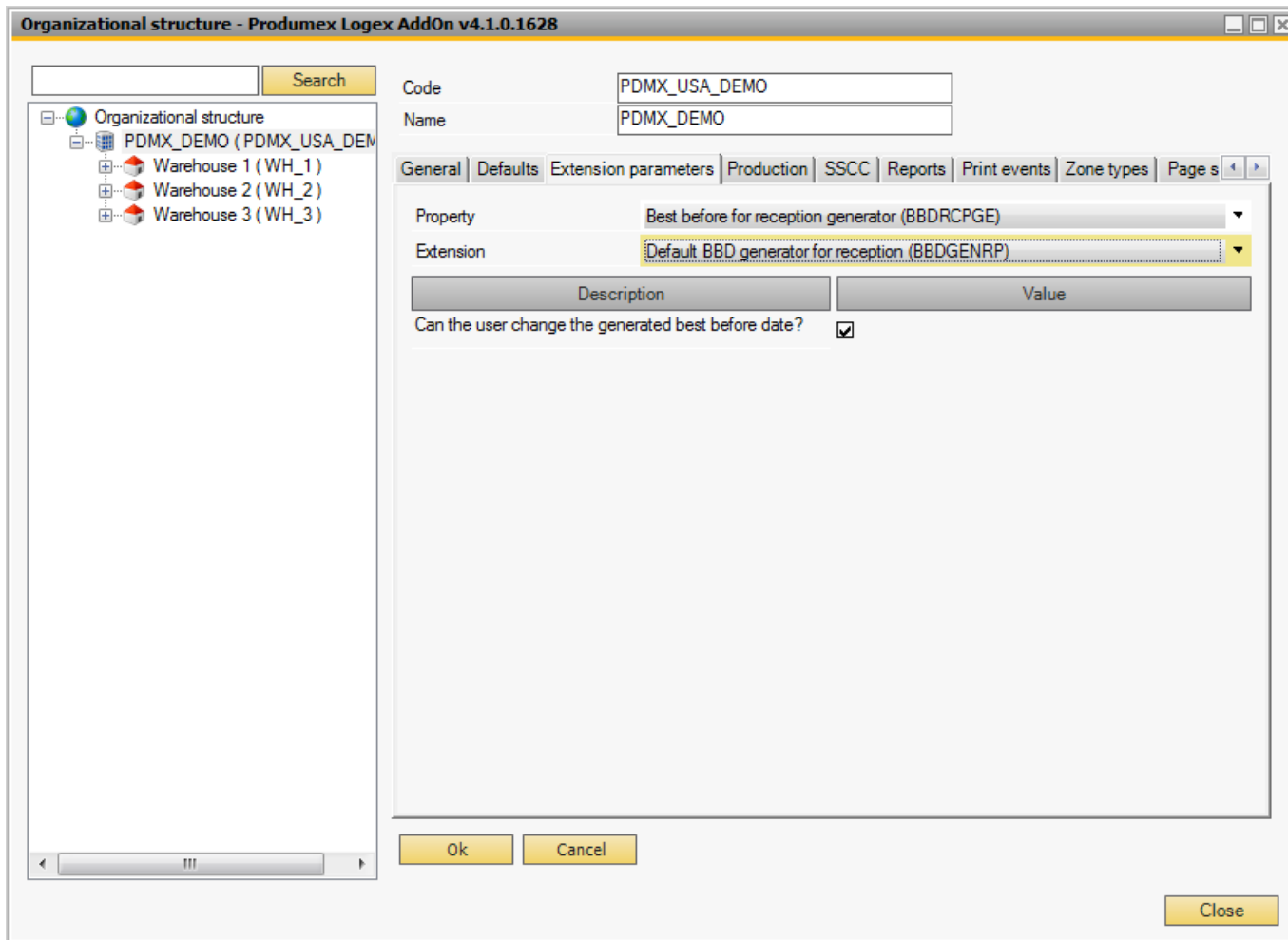
Option to whether or not the user will be able to change the generated best before date.

Save changed bbd on production order? (Y/N)

This option defines if the changed best before date needs to be saved on the production order or not.

5.1.3.7. Best before for reception generator

Default BBD generator for reception



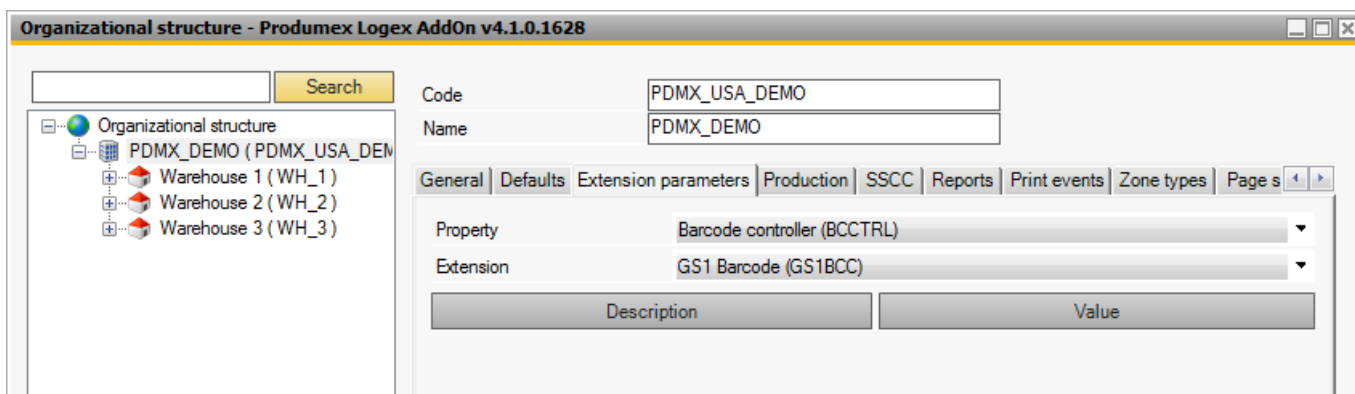
Can the user change the generated best before date? (Y/N)

Option to whether or not the user will be able to change the generated best before date.

5.1.3.8. Barcode controller

GS1 Barcode

Captures barcodes according to GS1 standards.



5.1.3.9. Cycle count controller

Controls the cycle counting

Organizational structure - Produmex Logex AddOn v4.1.0.1628

Code: PDMX_USA_DEMO
Name: PDMX_DEMO

General | Defaults | Extension parameters | Production | SSCC | Reports | Print events | Zone types | Page s

Property: Cycle count controller (CCCTRL)
Extension: Controles the cycle counting (DECCC)

Description	Value
Allow to select account in case of perpetual inventory?	<input type="checkbox"/>
Allow user to skip count	<input checked="" type="checkbox"/>
Auto handle batch?	<input type="checkbox"/>
Auto move SSCC	No move (NoMove)
Auto select batch/BBD when monolot pallet	<input type="checkbox"/>
Count after number of days	100
Count after number of operations	100
Count location when it becomes empty	<input type="checkbox"/>
Count type cycle count	'Lost and Found' location (LostAndFound)
Count type other operations	'Lost and Found' location (LostAndFound)
Default batch on auto handle batch	CC_BATCH
Enter reason on direct cycle count?	<input type="checkbox"/>
Enter reason when skipping count?	<input type="checkbox"/>
Price list for goods issue	-1
Price list for goods receipt	-1
Propose default quantity on logistic unit	<input type="checkbox"/>
Show differences during cycle count	<input type="checkbox"/>
Show differences during other operations	<input checked="" type="checkbox"/>

Ok Cancel Close

Allow to select account in case of perpetual inventory?

If this option is enabled, the accounts numbers need to be selected during the cycle count processing process if the option 'Perpetual inventory' is set.

Allow user to skip count

When performing cycle count during other operations, the user is allowed to skip the count.

Auto handle batch?

When this option is set, no batch needs to be entered in the cycle count process. The system will try to fill in the batch. If there is only 1 batch on the location, the system will take that batch. If there are multiple batches, the system will take the youngest batch. If no batch is on the location, the system will take the batch defined in the 'Default batch on auto handle batch'.

Auto move SSCC

When an SSCC is counted on a location, it is possible that for the system it is stored on another location. These options set what actions should happen when this occurs:

- No move
- Ask user

- Auto move

Auto select batch/BBD when monolot pallet

When cycle counting a monolot pallet (*a pallet with only 1 item and lot number*), the system will auto select the batch and BBD instead of the user that needs to fill it in.

Count after number of days

When a location has not been counted for the number of days defined here, the location needs to be counted. If the number is 0, this setting is not taken in account. This setting is only used if on location level this setting is not set.

Count after number of operations

If the number of operations since the last count exceeds the defined number of operations, the location needs to be counted. If the number is 0, this setting is not taken in account. This setting is only used if the setting is not set on location level.

Count location when it becomes empty

Count the location if the used location becomes empty (*count during other process*)

Count type cycle count

The type of cycle count to use when doing cycle count.

Possible values:

- 'Lost and Found': An actual theoretical location where differences are stored. This option will correct the stock on the counted location.
- 'Registration': Differences are stored in a table. With this option the stock on the counted location remains the same until the count is processed.

Count type other operations

The type of cycle count to use when doing cycle count during other operations.

Possible values:

- 'Lost and Found': An actual theoretical location where differences are stored. This option will correct the stock on the counted location.
- 'Registration': Differences are stored in a table. With this option the stock on the counted location remains the same until the count is processed.

Default batch on auto handle batch

The batch number to use when there is no batch on the counted location, and if the 'auto handle batch' option is set to true.

Dummy serial number format

When using the lost & found method for cycle count, and processing the cycle count for lost serial numbers on release only, dummy serial numbers might need to be generated in order to be issued. In this setting you can enter a fix part for all dummy serial numbers. Incrementing numbers will be appended to this value to generate unique dummy serial numbers.

Enter reason on direct cycle count?

Does the user need to enter a reason during direct cycle counting?

Enter reason when skipping count?

Does the user need to enter a reason when skipping a count? A count can only be skipped during

other operations.

Price list for goods issue

The price list to use when the cycle count needs to perform a goods issue. A negative value means the system will not set a price list, so the default of SAP is used.

Price list for goods receipt

The price list to use when the cycle count needs to perform a goods receipt. A negative value means the system will not set a price list, so the default of SAP is used.

Propose default quantity on logistic unit

If set, the system will automatically fill in the default quantity on a logistic unit.

Registration: Store lines with no difference

If set, the system will also store lines in the registration table where the counted difference is zero. This option is only taken in account when the 'Count type' = Registration.

Show differences during cycle count

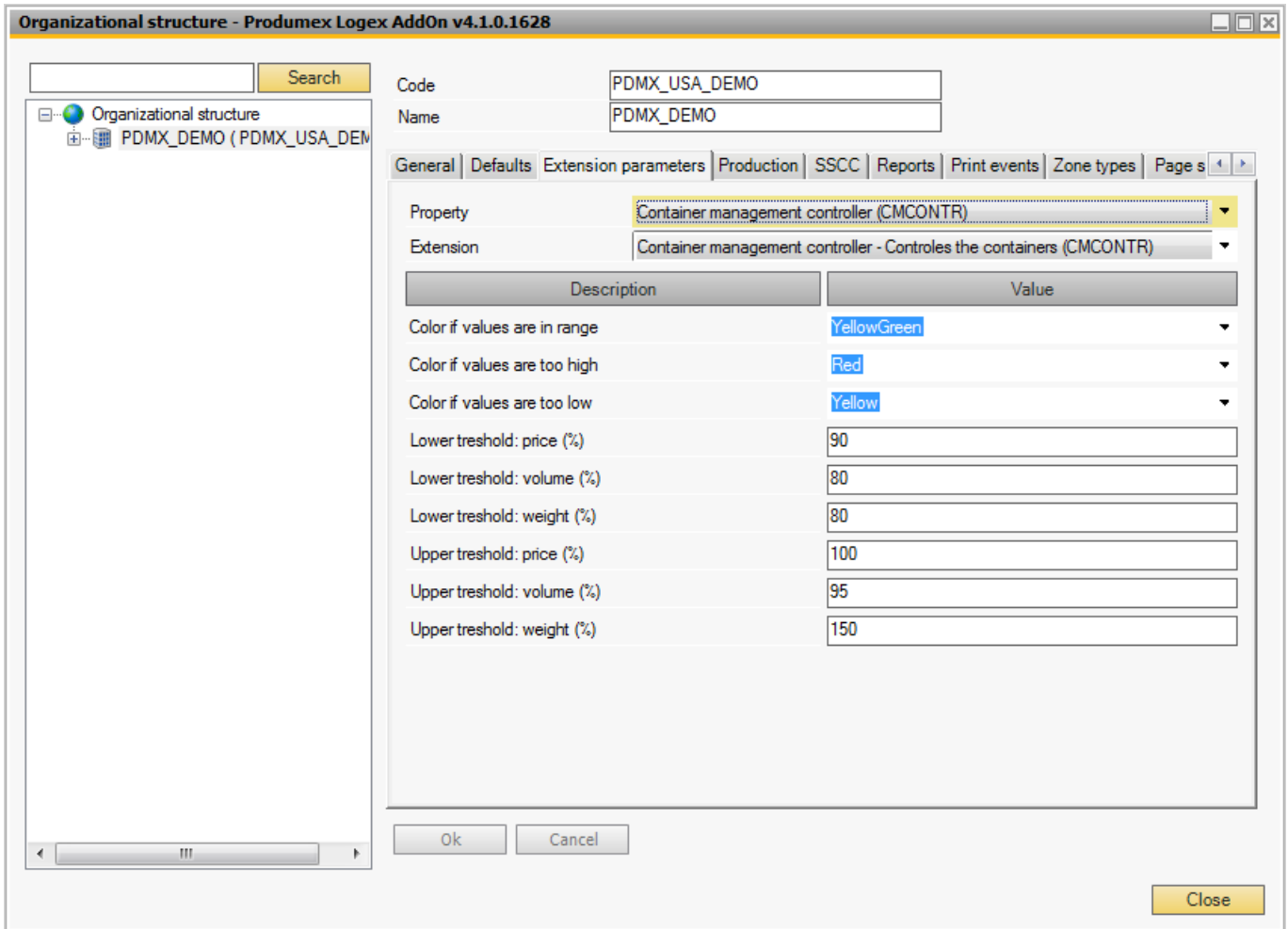
After counting a location it is possible to show the differences between the counted items and the items in the system. This is shown on the device during cycle count.

Show differences during other operations

After counting a location during other operations, it is possible to show the differences between the counted items and the items in the system. This is shown on the device during cycle count.

5.1.3.10. Container management controller

Container management controller - Controls the containers



Color if values are in range

Defines the color the controls should get if the values are in range. If no maximum value is set, this color will also be used. This name needs to be a valid Windows color name.

Color if values are too high

Defines the color the controls should get if the values are higher than the 'in range' values. This name needs to be a valid Windows color name.

Color if values are too low

Defines the color the controls should get if the values are lower than the 'in range' values. This name needs to be a valid Windows color name.

Lower threshold: price (%)

The lower threshold (in percentage) for the 'in range' values for the price.

Lower threshold: volume (%)

The lower threshold (in percentage) for the 'in range' values for the volume.

Lower threshold: weight (%)

The lower threshold (in percentage) for the 'in range' values for the weight.

Upper threshold: price (%)

The upper threshold (in percentage) for the 'in range' values for the price.

Upper threshold: volume (%)

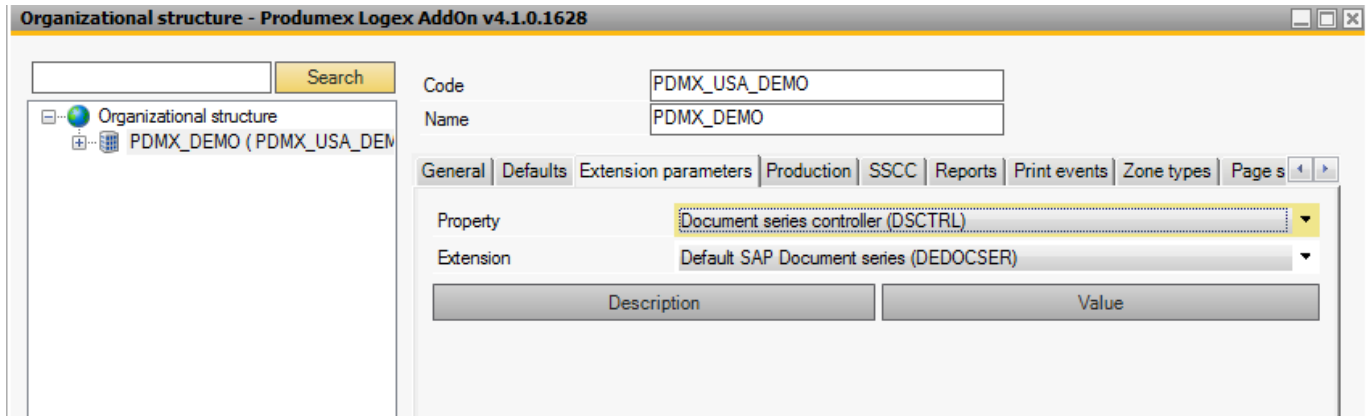
The upper threshold (in percentage) for the 'in range' values for the volume.

Upper threshold: weight (%)

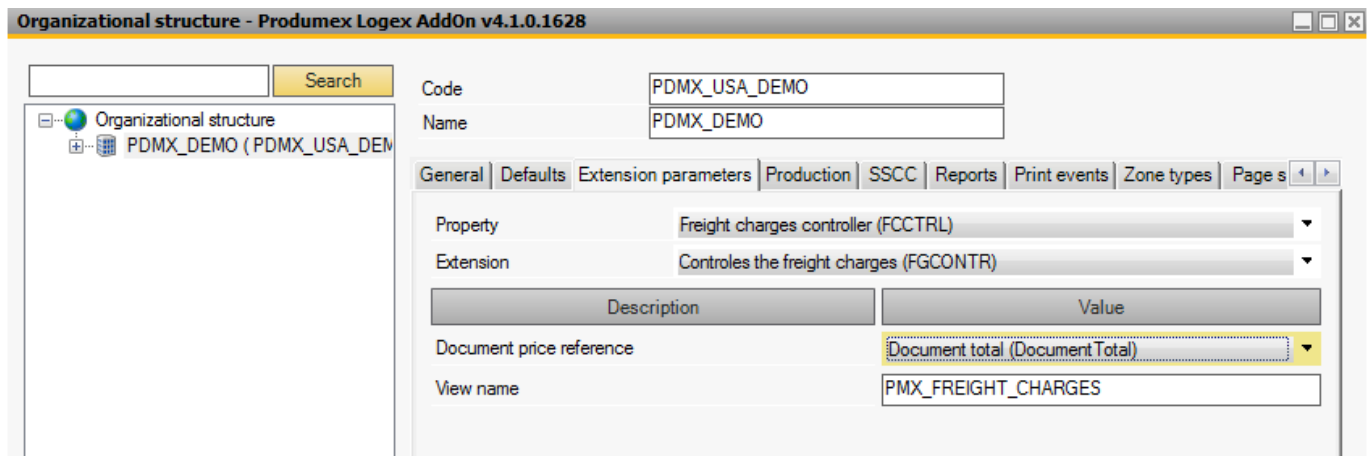
The upper threshold (in percentage) for the 'in range' values for the weight.

5.1.3.11. Document series controller

Default SAP Document series



5.1.3.12. Freight charges controller



Document price reference

The price to take in account for the freight charges

View name

The name of the view to use for calculation of the freight charges. The default value is: 'PMX_FREIGHT_CHARGES'

Configuration of the freight charges is done on the UDT PMX_FCDE (See page 38)

5.1.3.13. Incoming payment generator

None

5.1.3.14. Inventory Controller

Inventory Controller - Controller for the inventory

Order by - Details

When the inventory report is called for 'Group by' = Detail, this sorting will be used on the query.

There is the possibility to select one of the existing sortings.

But it is also possible to just type text for the order by statement.

The text in the field will be added to the ORDER BY clause of the query.

There is no need to start the text with ORDER BY.

Possible values:

- ItemCode ASC, InternalKey ASC: This will sort it on the item code, and next the row key of the inventory.
- InternalKey ASC: This will sort based on the row key of the inventory.
- StorLocCode ASC, ItemCode: This will sort on the storage location code and next on the item code.

5.1.3.15. Interface for PMX Advance Shipping Notice im-/export

None

5.1.3.16. Interface for PMX move order im-/export

IPmxMoveOrderInterface - Default

5.1.3.17. Interface for PMX move im-/export

IPmxMoveInterface - Default

5.1.3.18. Interface for PMX serial number im-/export

IPmxStockInterface - Pmx stock im-/exporter

5.1.3.19. Interface for stock QS change import

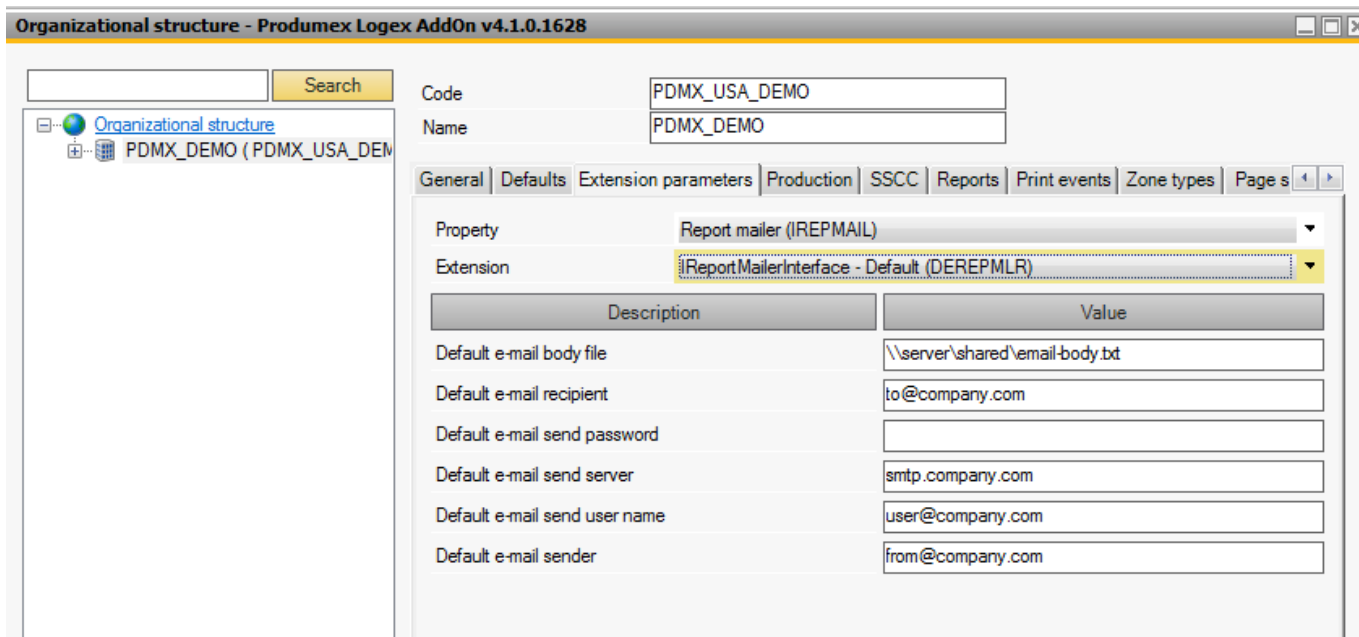
None

5.1.3.20. Interface for stock im-/export

None

5.1.3.21. Report mailer

IReportMailerInterface - Default



Default e-mail body file

Location of the email body

Default e-mail recipient

Default email recipient

Default e-mail send password

Default e-mail send password

Default e-mail send server

Default e-mail send server

Default e-mail send user name

Default e-mail send user name

Default e-mail sender

Default e-mail sender

5.1.3.22. Interface for SBO business partner im-/export

None

5.1.3.23. Interface for SBO goods issue im-/export

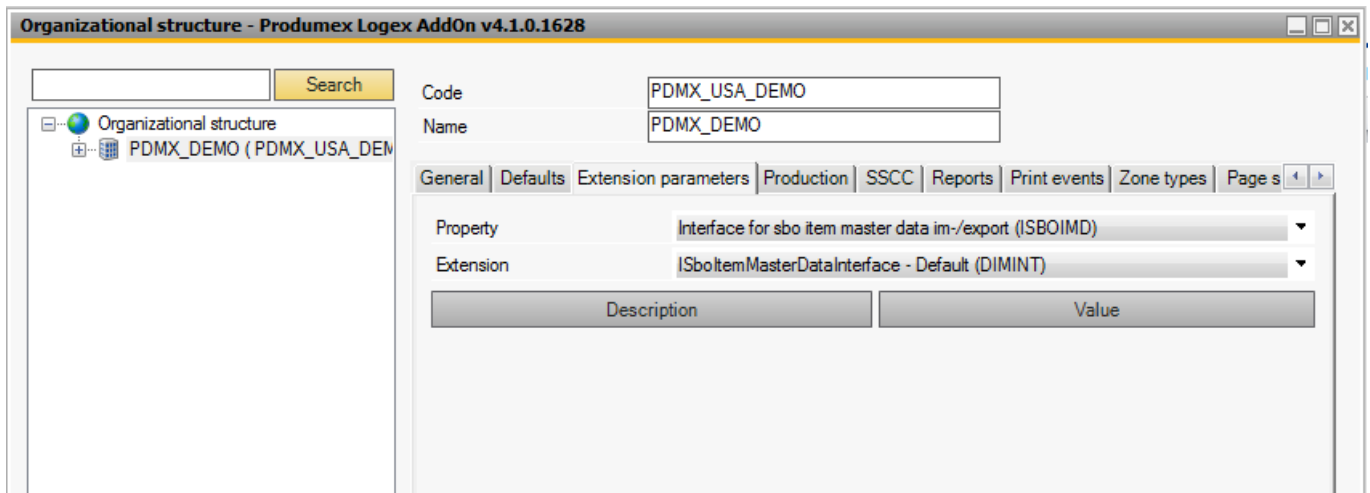
None

5.1.3.24. Interface for SBO goods receipt im-/export

None

5.1.3.25. Interface for sbo item master data im-/export

ISboltemMasterDataInterface - Default



5.1.3.26. Interface for SBO incoming payment im-/export

None

5.1.3.27. Interface for SBO purchase credit note im-/export

ISboPurchaseCreditNoteInterface - Default

5.1.3.28. Interface for SBO purchase delivery im-/export

ISboPurchaseDeliveryInterface - Default

5.1.3.29. Interface for SBO purchase invoice im-/export

ISboPurchaseInvoiceInterface - Default

5.1.3.30. Interface for SBO production issue im-/export

None

5.1.3.31. Interface for SBO production receipt im-/export

None

5.1.3.32. Interface for SBO purchase return im-/export

ISboPurchaseReturnInterface - Default

5.1.3.33. Interface for SBO purchase order im-/export

ISboPurchaseOrderInterface - Default

5.1.3.34. Interface for SBO sales credit note im-/export

ISboSalesCreditNoteInterface - Default

5.1.3.35. Interface for SBO sales delivery 2 im-/export

None

5.1.3.36. Interface for SBO sales delivery im-/export

ISboSalesDeliveryInterface - Default

5.1.3.37. Interface for SBO sales invoice im-/export

ISboSalesInvoiceInterface - Default

5.1.3.38. Interface for SBO sales return im-/export

ISboSalesReturnInterface - Default

5.1.3.39. Interface for SBO sales return 2 im-/export

None

5.1.3.40. Interface for SBO sales order im-/export

ISboSalesOrderInterface - Default

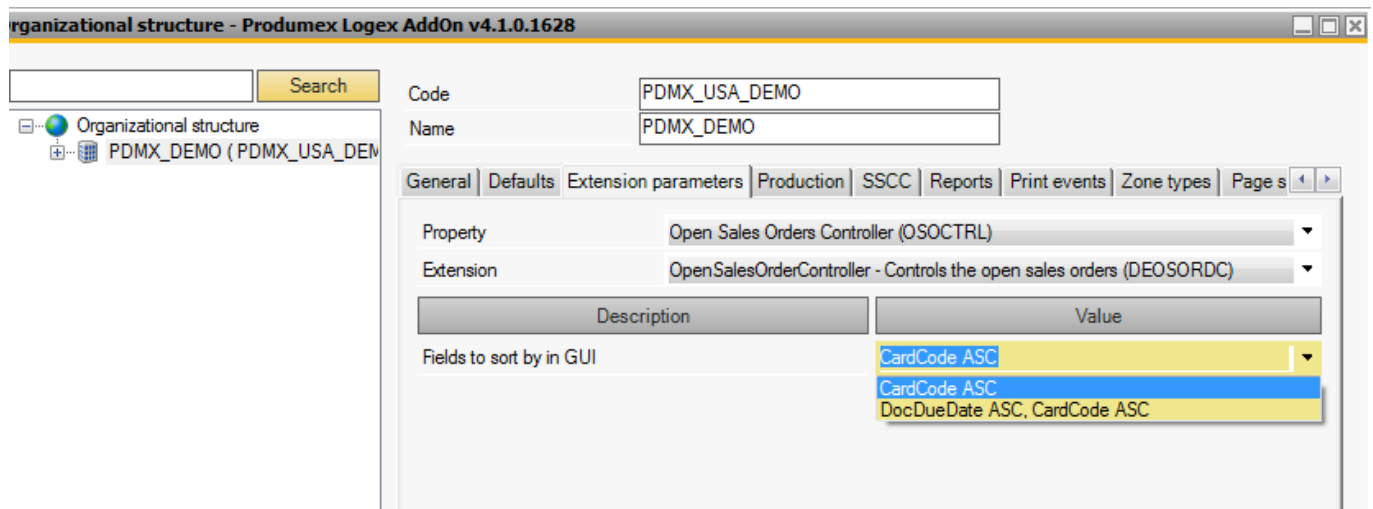
5.1.3.41. Interface for SBO warehouse transfer im-/export

None

5.1.3.42. Open Sales Orders Controller

OpenSalesOrderController - Controls the open sales orders

This shows all approved sales orders with active business partners and with open lines.



Fields to sort by in GUI

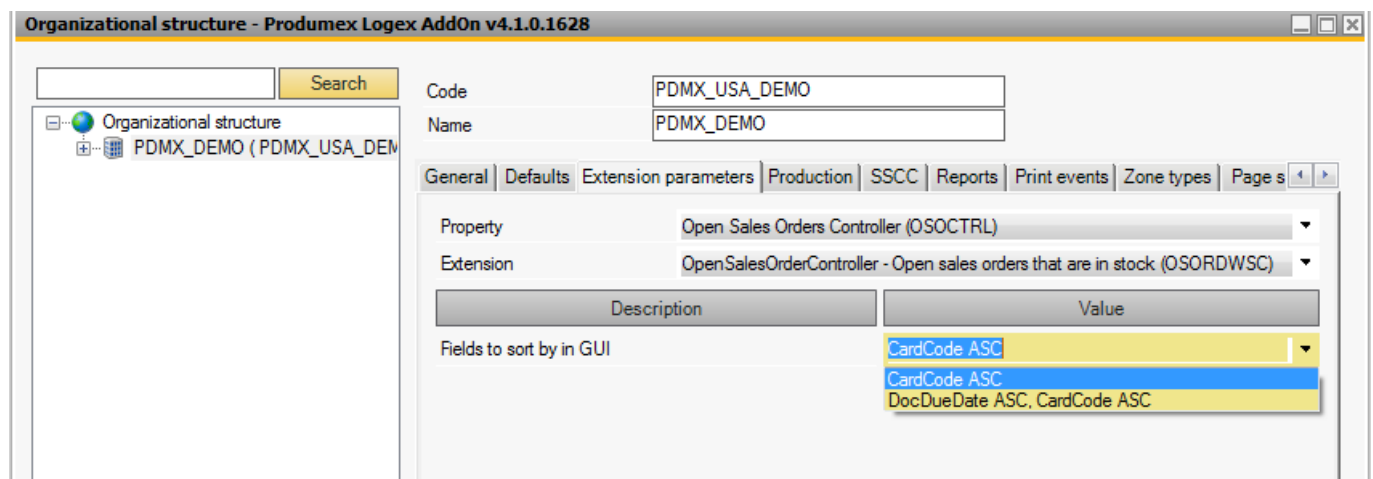
Define the field(s) the screen should be sorted on. The value to enter is adjustable.

However 2 predefined options can be chosen:

- CardCode in Ascending order
- DocDueDate, Cardcode both in Ascending order.

OpenSalesOrderController - Open sales orders that are in stock

Shows all approved sales orders with active business partners and with items that are in stock.



Fields to sort by in GUI

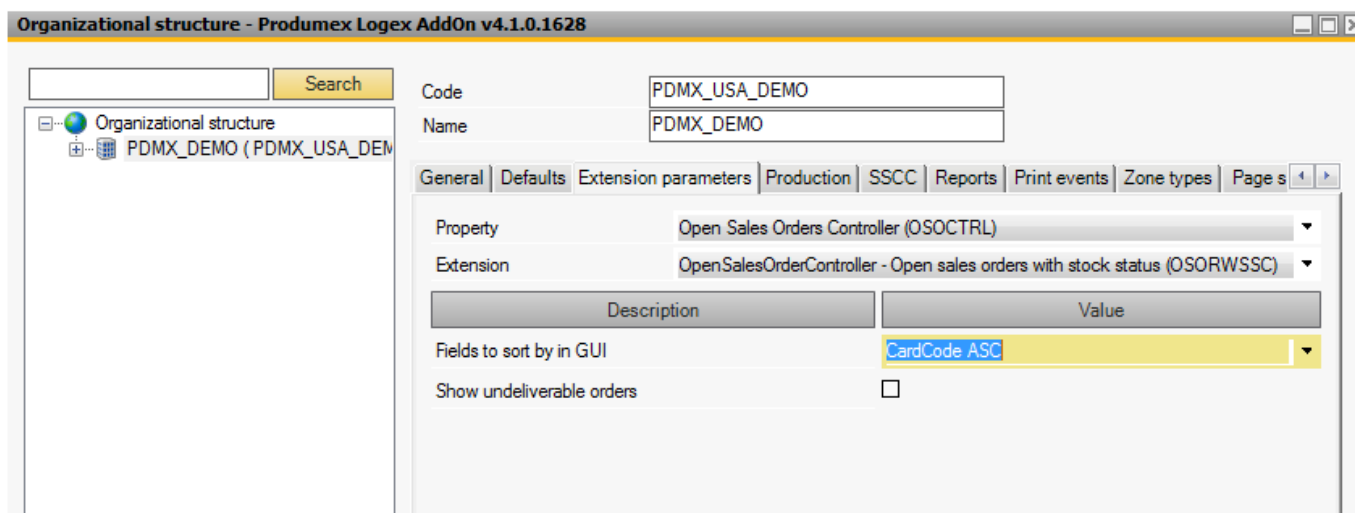
Define the field(s) the screen should be sorted on. The value to enter is adjustable. However 2 predefined options can be chosen:

- CardCode in Ascending order
- DocDueDate, Cardcode both in Ascending order.

This option will become obsolete. Please use the option Open sales orders with stock status

OpenSalesOrderController - Open sales orders with stock status

Show all approved sales orders with active business partners and with items that are in stock. This will also check if partial deliveries are allowed.



Fields to sort by in GUI

Define the field(s) the screen should be sorted on. The value to enter is adjustable. However 2 predefined options can be chosen:

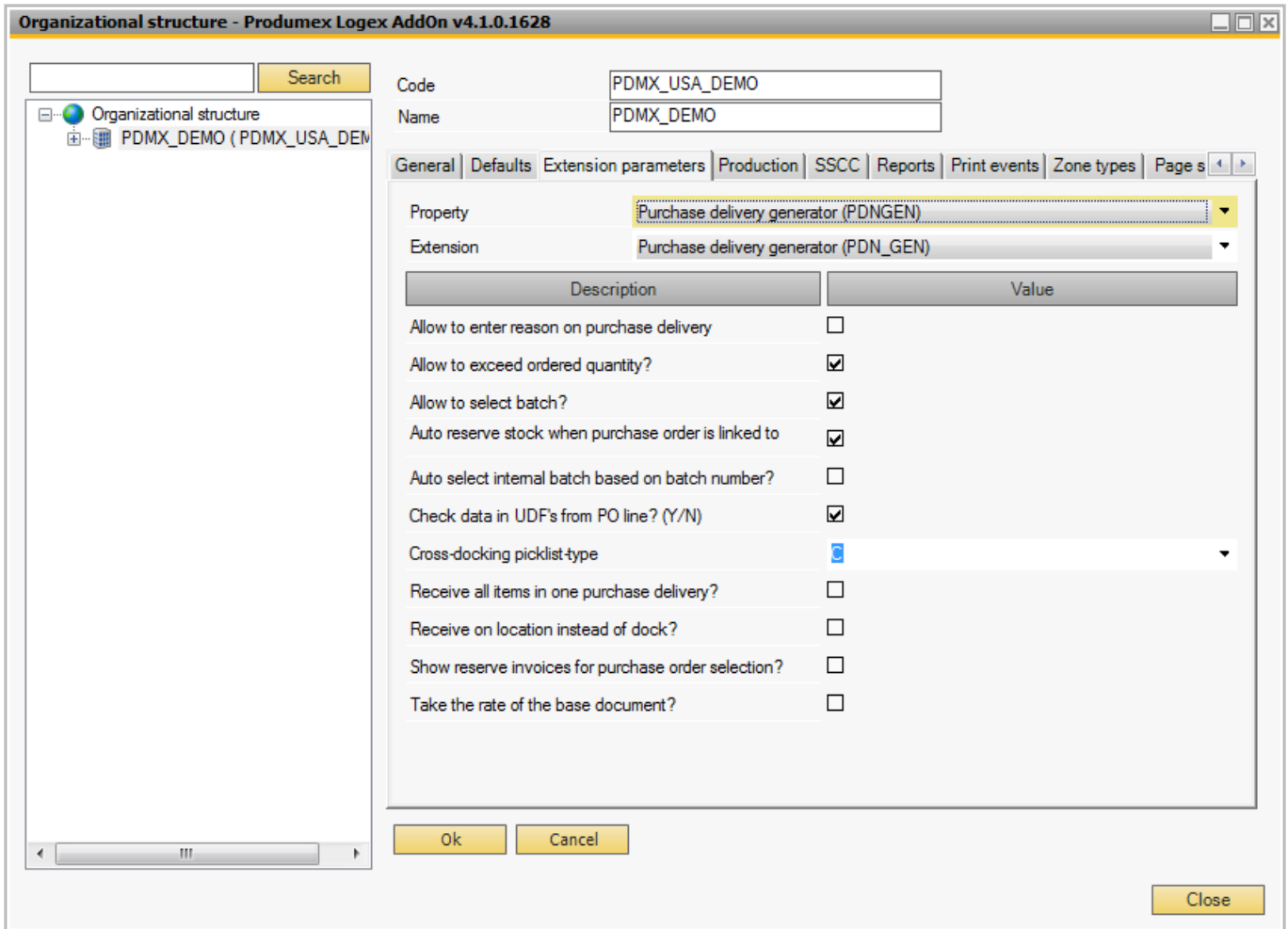
- CardCode in Ascending order
- DocDueDate, Cardcode both in Ascending order.

Show undeliverable orders

When checked, the system will also show sales orders that cannot create a proposal, meaning all open orders are shown.

5.1.3.43. Purchase delivery generator

Purchase delivery generator



Allow to enter reason on purchase delivery

This option enables you to enter a reason during reception on the handheld device. This option could be used for example to identify that there was no label found on the logistic unit and you want to record why the label was not scanned.

Allow to exceed ordered quantity?

If set to true, it will not be possible to receive more than what was ordered. This check is done on the scanner application.

Allow to select batch?

If this is set to true, the system will propose all batch numbers that are currently in stock for the item to receive. The user can still enter another batch number if he wants.

Auto reserve stock when purchase order is linked to sales order?

A purchase order can be linked to a sales order. If this setting is set to true, the system will lock the received stock for this sales order. So if a pick list is made for that sales order, the system will use the locked stock to pick. All quantities received will be locked, even if more quantity is received than what was on the purchase order.

When performing cross docking, this option should be checked, so the system will use the received items.

Auto select internal batch based on batch number?

If this is ticked, the system will not ask for an internal batch number if there is one found for the entered/scanned batch number.

Check data in UDF's from PO line?

If this is ticked, the system will check if the correct data has been entered on the scanner.

If the data is incorrect, a warning will be shown. The possible data to check: Batch number, Batch number 2, Best before date, Serial number.

On the scanner the selection of the item to receive will now be done based on PO line, instead of grouping it on item.

Cross-docking pick list type

For cross docking, the received goods will be delivered immediately based on the linked sales order of the purchase order. To do this, a pick list will be generated. To have a distinction between pick lists that are created for cross-docking, you can provide a pick list type.

Receive all items in one purchase delivery?

If set to true, the system will try to make 1 purchase delivery for all the entered data on reception. So at reception the user needs to fill in all the data for each logistic unit. After all data has been entered the system will create the purchase delivery. Because the logistic labels need to be printed after the data has been entered for each logistic unit, the printed label is not based on the actual stock in the system. So if some logistic units have been printed, but for some reason there was an error while creating the purchase delivery, the labels will not correspond to stock in the system. The user will need to enter the data again to create the purchase delivery. But now he can use the already printed labels to enter the data.

If set to false, a purchase delivery is made for each logistic unit.

Receive on location instead of dock?

By default Produmex will receive the goods on the selected dock. But it is possible to let the user identify another location. In this case the items are stored directly on the warehouse location, and no put away is created.

Show reserve invoices for purchase order selection?

When set to true, purchase reserve invoices are also shown in the selection of the purchase orders on the thin client.

Take the rate of the base document?

By default SAP uses the current exchange rate. If this setting is set to true, Produmex will use the exchange rate defined on the purchase order instead of the current exchange rate.

5.1.3.44. Picklist controller

Pick list controller - Controls the pick list

General	Defaults	Extension parameters	Production	SSCC	Reports	Print events	Zone types	Page s
Property	Picklist controller (PLCONTR)							
Extension	Pick list controller - Controles the pick list (DPLCONTR)							
Description	Value							
Allow cycle count on alternate picking? (Y/N)	<input checked="" type="checkbox"/>							
Allow multiple customers on SSCC?	<input type="checkbox"/>							
Allow to identify the SSCC to pick on?	<input type="checkbox"/>							
Allow to select the item to pick?	<input type="checkbox"/>							
Auto fill quantity for packaging types?	<input type="checkbox"/>							
Auto select batch/BBD on picking?	<input type="checkbox"/>							
Auto select the wave?	<input type="checkbox"/>							
Can the user pick bulk quantity from bulk location? (Y/N)	<input type="checkbox"/>							
Can the user pick full pallet from bulk location? (Y/N)	<input checked="" type="checkbox"/>							
Consolidate items to pick?	<input checked="" type="checkbox"/>							
Copy batch number when selecting alternate item? (Y/N)	<input type="checkbox"/>							
Copy non-inventory items to reserve invoice?	<input type="checkbox"/>							
Custom wave description fields for scanner	<input type="text"/>							
Disable selection of items? (Y/N)	<input type="checkbox"/>							
Force the user to pick full pallet? (Y/N)	<input checked="" type="checkbox"/>							

Allow cycle count on alternate picking? (Y/N)

If this option is enabled, the user has the possibility to perform a cycle count on the original pick location in case of alternate picking form a different location.

Allow multiple costumers on SSCC?

If set to true, the system will allow to put stock for multiple customers/delivery addresses on the same SSCC. This means that when you have a wave for multiple customers, the user is not forced to pick on a moveable location and going through the pack station.

Allow to identify the SSCC to pick on?

If set to true, the system will allow the user to scan an SSCC number he wants to use to put the picked stock on.

Allow to select the item to pick?

Enables the option to select an item to pick instead of letting the system choose the first item.

Alternate: Show locked quantity for current line? (Y/N)

When this is checked, the system will also show the item that was locked for the current pick list line in the list of alternate items.

Auto fill quantity for packaging types?

If set to true, the quantity to pick will be automatically entered instead of a zero.

Auto select batch/BBD on picking?

Enables the option to automatically select a Batch/BBD.

Auto select the wave?

If set to true, the system will select the wave. If set to false, the user can select the wave he wants to pick.

Auto selection of moveable location during picking? (Y/N)

If set to true, the system will automatically select the moveable location. But this is only when there is 1 available moveable location.

Can the user bulk quantity from bulk location? (Y/N)

If ticked the user can pick bulk quantities defined on the item master data from bulk locations.

Can the user pick full pallet from bulk location? (Y/N)

Normally bulk locations are not considered when allocating stock to a pick list. However this flag makes it possible that full monolot pallets at bulk locations (containing items that match the best before date and batch number criteria) can be picked by the operator.

The sorting of the stock to use depends on this setting and the option 'Must user first pick full pallet from bulk'.

More information at: 'Additional information - Pick list (See page 147)'.

Consolidate items to pick?

If set to true, items that have the same Batchnumber/BBD/Quality status/Location/... will be picked in one action, instead of a pick action by pick list line.

This option is used in 'Picking' and 'Zone picking' flow.

Copy batch number when selecting alternate item? (Y/N)

When the user wants to select an alternate batch, does the system need to copy the original batch number from the pick list?

Remark: If on the base document line a batch number is set, the batch will always be copied when selecting alternate items.

Copy non-inventory items to reserve invoice?

If set to true, the system will copy non-inventory items to the reserve invoice when creating reserve invoices from pick lists.

Custom wave description fields for scanner

Here the user has the possibility to enter a custom wave description that will be shown on the scanner. This text will be added to the select statement to select the waves on the Picking flow.

If the fields in the description are not on tables used by the default query, the option 'JOIN-sql for custom wave description for scanner' need to have the correct join to the table.

Disable selection of items? (Y/N)

If set to true, it will not be possible to select items on flows. The user will always have to scan a barcode for the item selection.

Force the user to pick full pallet? (Y/N)

Allows to define whether or not the user will be forced to pick a full pallet of items that contains the same or a lower quantity than the quantity that has to be picked for the pick list. Example: if a quantity of 60 has to be picked, and if a full pallet of 40 that answers the best before date and batch number criteria is available, this full pallet will be selected by the system for picking.

Picking will occur by scanning the SSCC. The quantity will not be asked. The SSCC will remain the

same as the original SCCC.

If this is set to false, the user will need to pick it as 'item picking'.

JOIN-sql for custom wave description for scanner

If the 'Custom wave description fields for scanner' option contains fields that are not used in the default query, the user needs to define the JOIN query here.

Make picklist ready before print? (Y/N)

The 'Make pick list ready' functionality allocates stock on location level to the pick list. So if a pick list report needs to have the locations filled in, this option should be enabled.

Must the user first pick full pallet from bulk location? (Y/N)

Normally bulk locations are not considered when allocating stock to a pick list. However this flag makes it possible that full monolot pallets at bulk locations (*containing items that match the best before date and batch number criteria*) can be picked by the operator.

This option forces to first take full pallets from a bulk location before using pick locations.

The sorting of the stock to use depends on this setting and the option 'Can user pick full pallet from bulk'.

More information at: 'Functional information - Pick list (See page 147)'.

Only pick items on location on same or lower level as dock? (Y/N)

If set to true, the system will only create a pick list for items it can find on storage location defined on the same or lower level as the dock selected on the pick list proposal. The levels are defined by the zones those locations are in.

Pick items order by

How are the items to pick sorted on the scanner?

Options:

- Order by Full LUID, sequence, no location: First full pallet, then the sequence of the location, then all lines without a location.
- Order by Full LUID, picked item, location code: First full pallets, then picked items, then location code. This means that when ItemA and ItemB needs to be item-picked on several locations, the system will first pick all quantities of ItemA, regardless of where it is stored. (*Full pallets are still picked first*)

Picking: Keep picking same location (Y/N)

When this is set to true, the system will not ask the user to identify the pick location again when the next item to pick is in the same location.

Route picking picklist order by

The sorting of picklist when picking for a route during ad hoc picking

Options:

- Order by priority, due date and doc entry
- Order by sequence on route: forward
- Order by sequence on route: reverse.

Time to show 'item is picked' message?

The number of seconds the 'item is picked' message is shown on the scanner:

Possible values:

- Negative values: The message is not shown.
- Value 0: The message will remain visible until the user clicks the 'OK' button
- Positive values: The message will remain visible for the entered number of seconds.

Wave order by

Sorting of waves on the picking flows

Options:

- Order by Priority, due date, wave key
- Order by due date, priority, wave key

Ad hoc alternate item? (Y/N)

If this is set to false, the system will show a list of alternate items to choose from.

If this is set to true, the system will allow the user to enter any data when performing alternate picking, and the system will check if the entered data is allowed.

Ad hoc picking: Keep picking same item? (Y/N)

If this is set to true, the system will keep asking to pick the chosen item until everything is picked for that item.

If set to false, after picking an item, the system will go to the overview screen of all items to pick, so the user can select the next item to pick.

Ad hoc: Auto fill pick quantity? (Y/N)

When this is set to true, the quantity to pick will be entered in the screen to enter the quantity.

Else the quantity will be 1, or when the maximum quantity is less than 1, the maximum quantity is shown.

Allow ad hoc picking from bulk locations?

This option enables the confirmation message at the end of the picking that all the items are picked.

Allow confirmation that ALL goods were picked

This option enables the confirmation message at the end of the picking that all the items are picked.

Auto move SSCC on a customer-collected related move

When scanning an SSCC during ad hoc picking – customer collect, the SSCC is automatically moved to the dock instead of asking the user if he wants to move the complete SSCC.

Choose dock on ad hoc picking?

When this option is checked, the system will ask the user to select a dock where he is going to pick to.

This is used in the ad hoc picking flow for the options Route and Pick list. The selected dock is stored on the route/pick list.

Reason requirements when skipping first location (Ad hoc picking)

The ad hoc picking flow will suggest a number of locations. Those locations are sorted, so to first location is the best location to take it from. If the user wishes to pick from another location, it is possible to let the user enter a reason if it does not match the first location (*Docks are not considered as a first location*).

Options:

- No reason
- Requires user-entered reasontext: Free text, entered by user, minimum 10 characters
- Requires selected reason from list

Lock wave by zone/user (Zone picking)

If this is set to true, the system will lock all items to pick on the zone for the current user instead of only locking the item/zone he is picking from.

This is used in the 'Zone picking' flow.

Only show completely unlocked waves in case of zone picking?

If set to true, the user can only see wave that have no locking for a user on it. This is used in the 'Zone picking' flow.

Time to show pick/pack remarks on packing?

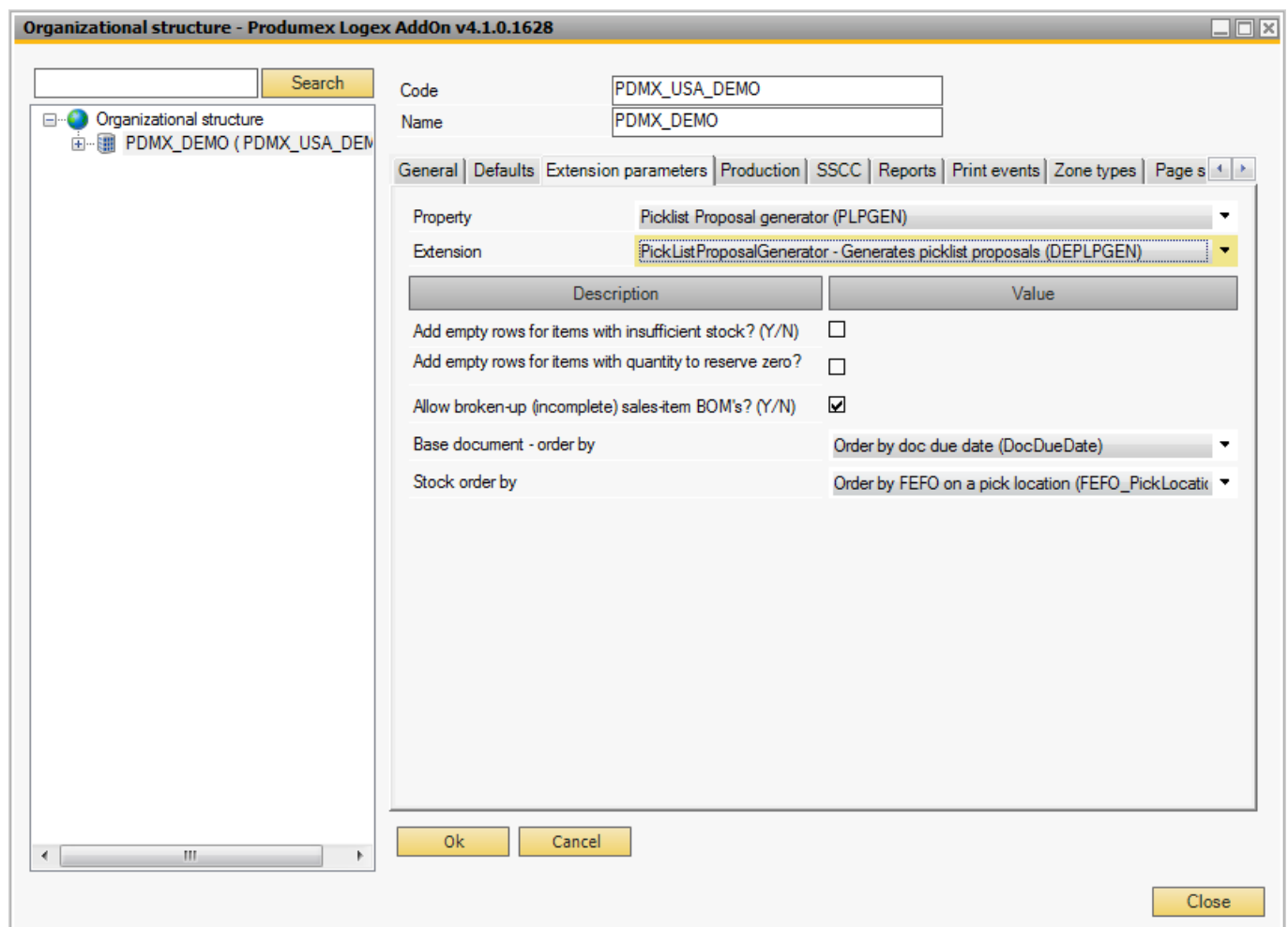
The number of seconds the pick/pack remarks are shown in a popup window in the packaging client:

Possible values:

- Negative values: The message is not shown.
- Value 0: The message will remain visible until the user clicks the 'OK' button
- Positive values: The message will remain visible for the entered number of seconds.

5.1.3.45. Pick List Proposal generator

PickListProposalGenerator - Generates picklist proposals



Add empty rows for items with insufficient stock? (Y/N)

If set, the system will add rows with quantity = 0 to the proposal when there is not enough stock available. This can be used to quickly see if all stock is available.

Add empty rows for items with quantity to reserve zero? (Y/N)

If set, the system will add rows with quantity = 0 to the proposal when there is nothing to reserve. This can be used to quickly see if all stock is available.

Allow broken-up (incomplete) sales-item BOM's? (Y/N)

If set, the system will not add components from a BOM when there is one or more component missing. The check is done based on the original BOM.

Base document - order by

When proposals are made, it is possible to do this for several orders in one time. The system will group them by customer, ship to, and pick list type and item pick list types. This option is to sort those orders within the same group.

Options:

- Order by doc due date,
- Order by line delivery date, doc entry,
- Order by doc entry

Force the proposed batch? (Y/N)

When this option is set to true, the batch the system proposes will be forced. This is used on ad hoc picking, in combination with the option 'Allow multiple batches' on a document line. When both are true, ad hoc picking can only pick from that batch, instead of any batch.

Serial numbers stock order by

This option handles what stock should be taken first to put on the proposal, for serial numbered items with track location.

Options:

- Use default order by

The sorting of stock to allocate for serial numbered items with track location is the one defined in the "Stock order by" option.

- Order by serial numbers (alphanumerical)

The sorting of stock to allocate for serial numbered items with track location is: Oldest serial number found on LUID (serial numbers are sorted alphanumerically). The allocation is done on item-batch-LUID level.

Show proposals with pick lists on open doc. report? (Y/N)

When this option is set to false, the open documents report for pick list proposals will not show proposals that have already a pick list.

Stock order by

This option handles what stock should be taken first to put on the proposal.

Options:

- Order by FEFO on a pick location

The sorting of stock to allocate is: Expiry date, Batch number, batchnumber2. The allocation is done on item-batch level.

- Order by FEFO ITRI on a pick location

The sorting of stock to allocate is: Expiry date, Batch ID. The allocation is done on item-batch level.

- Order by LUID

The sorting of stock to allocate is: Has LUID, LUID, Expiry date, Batch number, batchnumber2. The allocation is done on item-batch-LUID level.

- Order by Bulk, Full LUID, LUID, BBD, Itri

The sorting of stock to allocate is: Non Pick location, Is full pallet, Has LUID, LUID, Expiry date, Itri. The allocation is done on item-batch-LUID level.

- Order by Bulk, Full LUID, BBD, Itri, LUID

The sorting of stock to allocate is: Non Pick location, Is full pallet, Expiry date, Itri, Has LUID, LUID. The allocation is done on item-batch-LUID level.

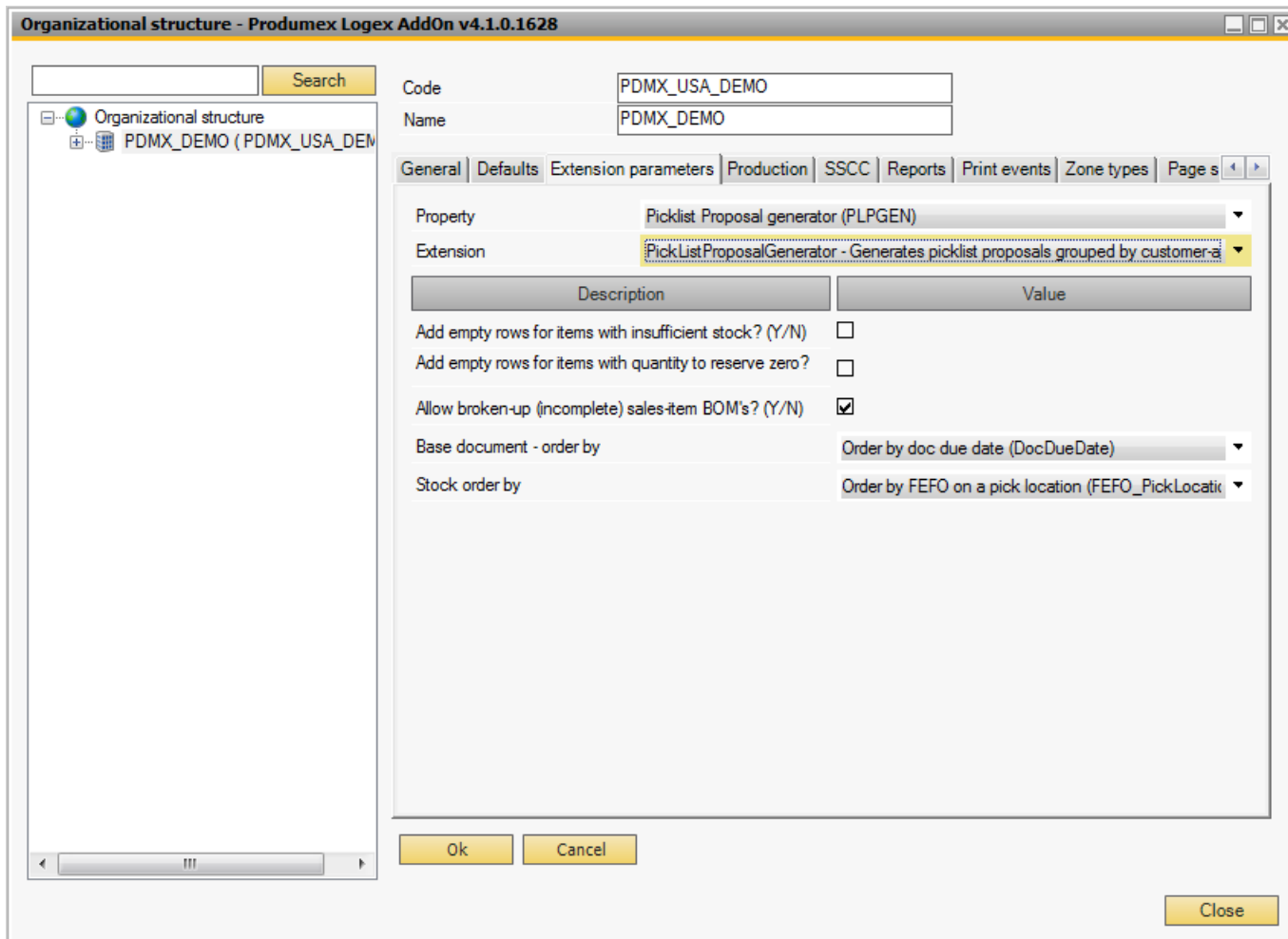
Try to group items on 1 proposal

When this is checked the system will try to group the items on 1 proposal. This means that each time a proposal is being made, it will try to close the existing one (If no pick list has been created yet), and create a new one for all remaining items.

When this is not checked, the system will always try to create a new proposal.

PickListProposalGenerator - Generates picklist proposals grouped by customer-address

If multiple sales orders are selected for the same customer/address, they will be grouped into 1 proposal.



Add empty rows for items with insufficient stock? (Y/N)

If set, the system will add rows with quantity = 0 to the proposal when there is not enough stock available. This can be used to quickly see if all stock is available.

Add empty rows for items with quantity to reserve zero? (Y/N)

If set, the system will add rows with quantity = 0 to the proposal when there is nothing to reserve. This can be used to quickly see if all stock is available.

Allow broken-up (incomplete) sales-item BOM's? (Y/N)

If set, the system will not add components from a BOM when there is one or more component missing.

Base document - order by

When proposals are made, it is possible to do this for several orders in one time. This option is to sort those orders.

Options:

- Order by doc due date,
- Order by line delivery date, doc entry,
- Order by doc entry

Force the proposed batch? (Y/N)

When this option is set to true, the batch the system proposes will be forced. This is used on ad hoc picking, in combination with the option 'Allow multiple batches' on a document line. When both are true, ad hoc picking can only pick from that batch, instead of any batch.

Serial numbers stock order by

This option handles what stock should be taken first to put on the proposal, for serial numbered items with track location.

Options:

- Use default order by

The sorting of stock to allocate for serial numbered items with track location is the one defined in the "Stock order by" option.

- Order by serial numbers (alphanumerical)

The sorting of stock to allocate for serial numbered items with track location is: Oldest serial number found on LUID (serial numbers are sorted alphanumerically). The allocation is done on item-batch-LUID level.

Show proposals with pick lists on open doc. report? (Y/N)

When this option is set to false, the open documents report for pick list proposals will not show proposals that have already a pick list.

Stock order by

This option handles what stock should be taken first to put on the proposal.

Options:

- Order by FEFO on a pick location

*The sorting of stock to allocate is: Expiry date, Batch number, batchnumber2.
The allocation is done on item-batch level.*

- Order by FEFO ITRI on a pick location

The sorting of stock to allocate is: Expiry date, Batch ID. The allocation is done on item-batch level.

- Order by LUID

*The sorting of stock to allocate is: Has LUID, LUID, Expiry date, Batch number, batchnumber2.
The allocation is done on item-batch-LUID level.*

- Order by Bulk, Full LUID, LUID, BBD, Itri

*The sorting of stock to allocate is: Non Pick location, Is full pallet, Has LUID, LUID, Expiry date, Itri.
The allocation is done on item-batch-LUID level.*

- Order by Bulk, Full LUID, BBD, Itri, LUID

*The sorting of stock to allocate is: Non Pick location, Is full pallet, Expiry date, Itri, Has LUID, LUID.
The allocation is done on item-batch-LUID level.*

Try to group items on 1 proposal

When this is checked the system will try to group the items on 1 proposal. This means that each time a proposal is being made, it will try to close the existing one (If no pick list has been created yet), and create a new one for all remaining items.

When this is not checked, the system will always try to create a new proposal.

5.1.3.46. Pick list robot

None

5.1.3.47. Picking for production controller

IPickingForProductionController - Controles the picking for production

Allow continuous picking for production

If set, the system will allow to pick production order lines, even if full quantity has been picked.

Create proposal for picking

If set, the system will create pick lists for the production orders. This will lock stock for this pick list (proposal). If ticked you can create proposals and pick lists for production orders with the same functionality as the pick lists for sales.

Picking order by

Select the sorting of the items to propose when performing picking for production.

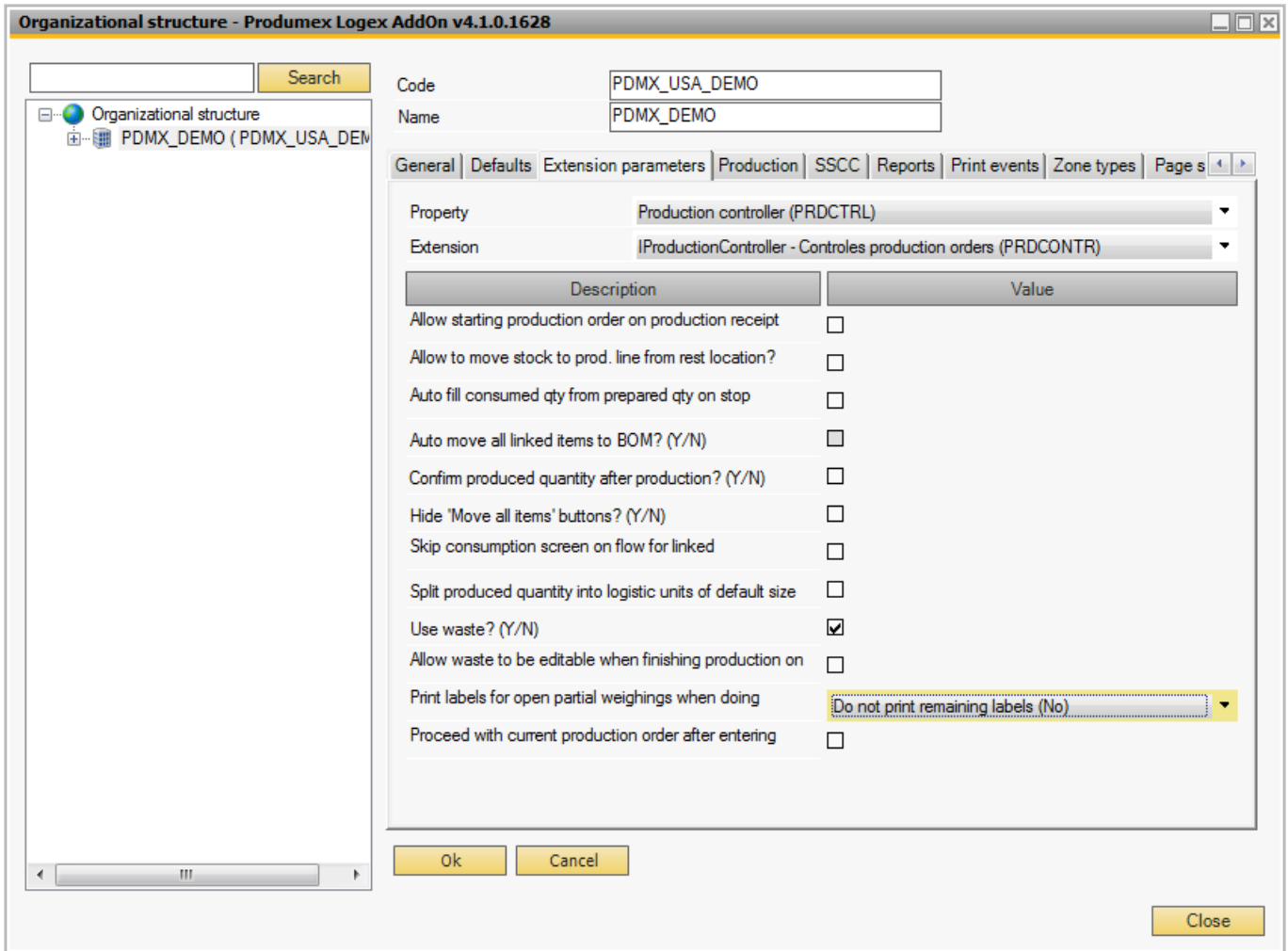
This option is used when no proposals are created for production (*FEFO = BBD, BatchNumber, BatchNumber2*)

Options:

- FEFO_LUID_PickProduction: Order by FEFO, Non pick location, LUID, no LUID
- LUID_PickProduction: Order by LUID, No LUID, Non pick location, FEFO
- FEFO_FullPallet_PickProduction: Order by FEFO, Non pick location, Full LUID, LUID, no LUID
- FEFO_PickProduction: Order by FEFO, Non pick location, no LUID, LUID

5.1.3.48. Production controller

IProductionController - Controls production orders



Allow starting production order on production receipt flow? (Y/N)

The normal process using the production manager, is to start the production order on the production manager. On the production receipt flow, only started production orders are shown. If this is set to true, the user will be able to start the production order on the production receipt flow. If there are locations that need to be lined up, the system will only line them up if on the item master data the option to auto line up has been set. Otherwise the lined up locations will need to be set on the production manager.

Allow to move stock to prod. line from rest location? (Y/N)

By default the stock is moved from the input to the production line. By setting this option to true, the user can also move stock from the rest location to the production line.

Auto fill consumed qty from prepared qty on stop production? (Y/N)

This option is used in the production flow with immediate consumption. If components have been prepared (Weighed, ...) and it is not for the theoretical quantity, but within the tolerance, the system will fill in the prepared quantity, instead of the theoretical quantity.

Auto move all linked items to BOM? (Y/N)

If this is set to true, all items that are on the production order line will be moved from the input location to the production line when selecting the production order on the device. This will move all quantities for those items.

Automatically close production orders on completion? (Y/N)

If this is set to true, the production order will be closed when all planned quantity for the production

order has been reached.

This is used in the ProductionFlow and ProductionReceiptFlow.

Confirm produced quantity after production? (Y/N)

If this is set to true, the user will need to confirm the quantity he has entered to produce if it deviates from the allowed quantity (*See item master data configuration*). The system will show the product description + quantity on the screen to confirm.

Hide move all item buttons? (Y/N)

If this option is enabled, when adding the items to use in the production client, there is only the possibility of 'Move an item' instead of 'move an item', 'move all items linked to the production order' and 'move all items'.

Skip consumption screen on flow for linked components?

If this is set to true, all screens for consumption on the production flow for items that are prepared (Weighed, ...) will be skipped.

Split produced quantity into logistic units of default size

If this is set to true, the system will create a number of logistic units, based on the default quantity defined on the item master data. If the default quantity for production is set, the system will take that quantity, otherwise the default quantity is used.

Use waste? (Y/N)

When producing, it is possible to enter waste quantities. When set to true, the user will be able to set waste quantities when producing according to 'Production with immediate consumption'.

Allow waste to be editable when finishing production on production manager?

If this is set to true, the user will be able to also edit the columns for the waste quantity. This option is used on the production manager.

Print labels for open partial weighing when doing 'Complete weighing'

When there is still open quantity and the user presses 'Complete weighing', do labels need to be printed?

Options:

- Yes
- No
- Ask

Proceed with current production order after entering quantity on prod. receipt flow?

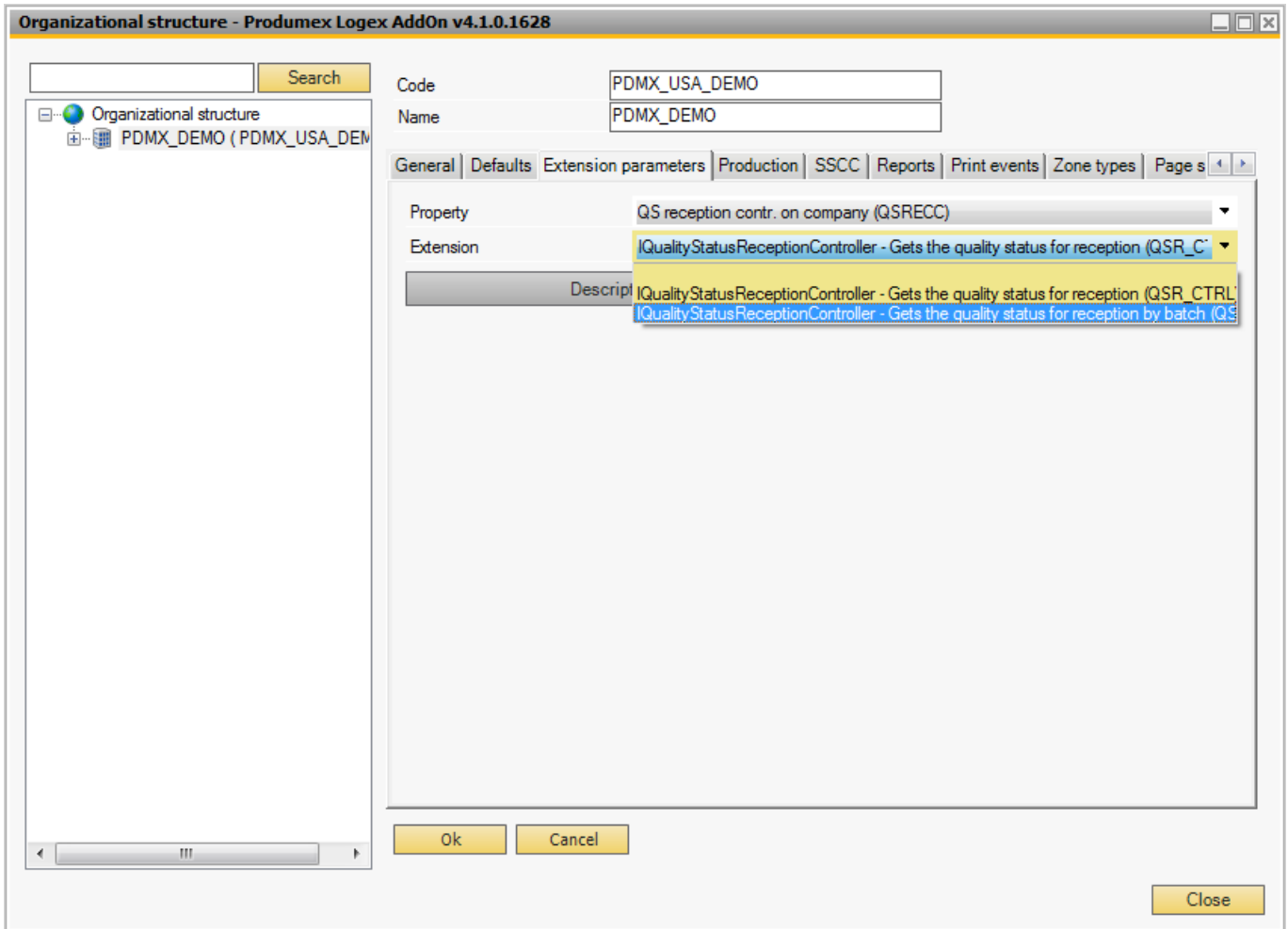
The user can proceed with the current production order on the production receipt flow when this option is enabled.

When this option is enabled, the production flow will go to the screen to enter quantity/serial numbers after a logistic unit has been created instead of going to the selection of production order screen.

Stock row limitation on stop PRD (PRD manager)

The number of rows shown for used stock when stopping the production on the production manager can be limited. When putting a negative number here, the system will show all rows.

5.1.3.49. QS reception contr. on company



IQualityStatusReceptionController - Gets the quality status for reception

When receiving, the default quality status defined on the item is used. If on the item there is no default quality status set, the default quality status on company level (*Produmex Organizational Structure* → *Company* → *TabPage 'Defaults'*).

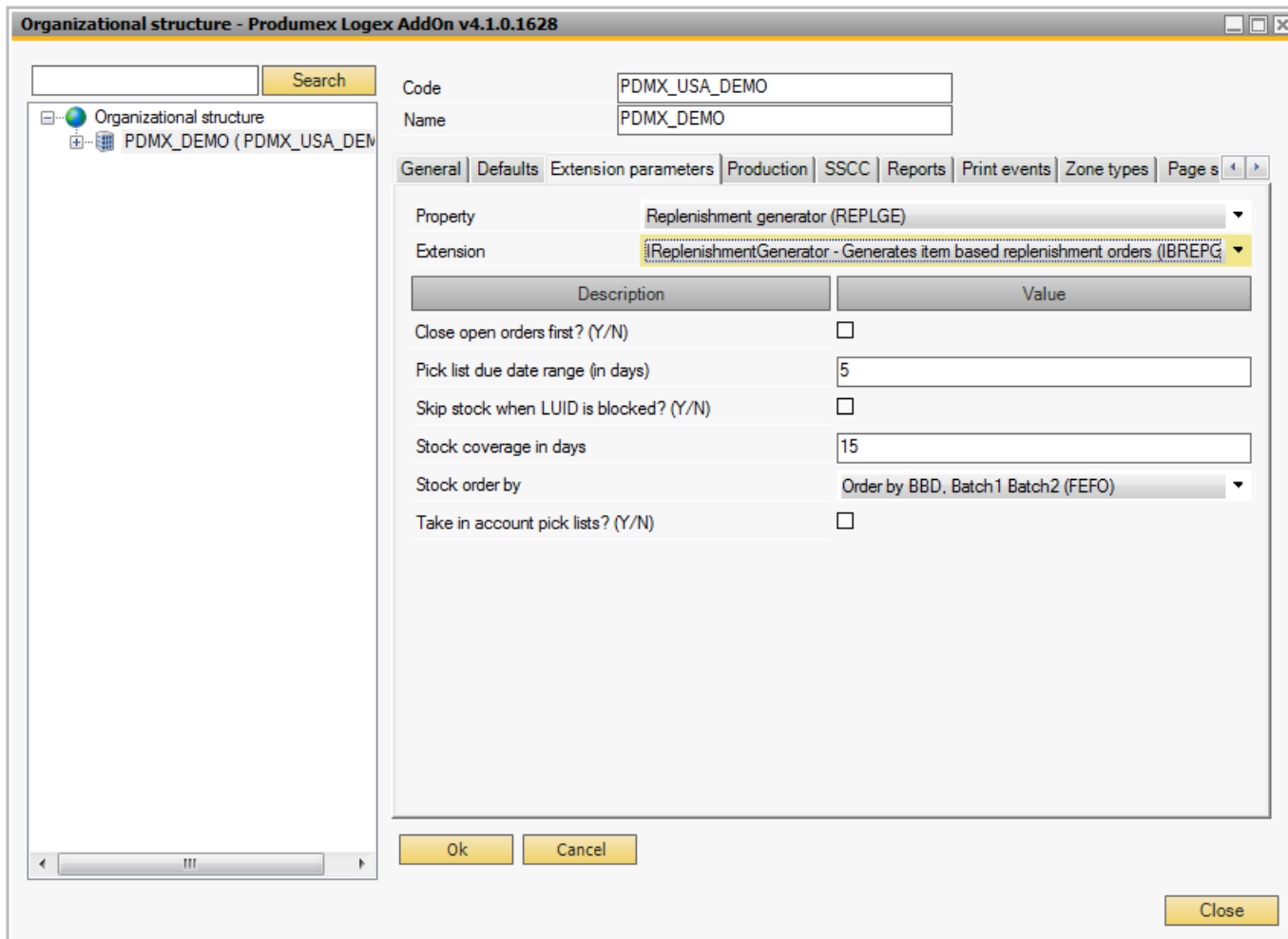
IQualityStatusReceptionController - Gets the quality status for reception by batch

This controller is more complex. The system will first check the batch that is being received. If this batch is not present in the system, the default quality status defined on the item is used. If on the item there is no default quality status set, the default quality status on company level (*Produmex Organizational Structure* → *Company* → *TabPage 'Defaults'*).

If this batch is present in the system, the system will check if the stock of this batch has the released quality status defined on the item. If on the item there is no released quality status set, the released quality status on company level. If the stock has the released quality status, the stock to receive will also get this quality status, because this batch has already been approved. If the released quality status is not found in the system, the stock to receive will get the default quality status.

5.1.3.50. Replenishment generator

IReplenishmentGenerator - Generates item based replenishment orders



This replenishment generator starts from the configuration on the item master data. It will try to generate orders where the 'Quantity on pick locations' is greater than 0. When the generator has calculated the quantity that should be replenished, it will try to find all pick locations that have this item in the 'Can be replenished' list and where the minimum quantity for that item on the location is higher than zero. It will try to create orders on those locations, ordered by the sequence defined on the location.

If no location can be found, or if there is enough stock on the location(s), (*taking in account the maximum quantity on the location*), it will not create a replenishment order.

Close open orders first? (Y/N)

When this is checked, the system will first close all open replenishment orders when running the replenishment tool.

Pick list due date range (in days)

The pick list due date range in days. If 'Take in account pick lists' is checked, this setting defines the due date range of all the pick lists that should be taken in account.

Skip stock when LUID is blocked? (Y/N)

When this option is checked, the blocked LUID will not be moved to the pick location. This can be used when the system is configured that the pick list proposal generator already locks stock based on the LUID and if on the pick list controller the option to pick full pallet from bulk location is allowed.

Stock coverage in days

In combination with the configuration on Item master data it will calculate the needed quantities within the days defined in the stock coverage. If for example you have a stock coverage of 15 days,

the generator will calculate the needed quantities for those 15 days, and create replenishment orders (*if needed*) so there will be enough stock on the locations for at least 15 days.

Stock order by

The order of the stock to be used:

- Order by BBD, Batch1, Batch2 (FEFO)
- Order by ItriKey, No LUID, LUID (FIFO)

Take in account pick lists? (Y/N)

When this option is checked, items that are on pick lists (*with a due date in range*) will be subtracted from the current available stock on the location.

CALCULATION:

A replenishment order will be generated when: $(\text{Stock on pick location} - \# \text{ on pick list}) < (\text{Est. sales qty} * (\text{Stock coverage} / \# \text{days in month}))$

Configuration 1:

- ItemA: Quantity on pick locations = 120
- ItemA: Estimated sales quantity by month = 100
- ItemA: Stock on pick locations = 70
- ItemA: Items on a pick list (in range) = 10
- Generator: Stock coverage = 15

In this example:

$$(70 - 10) < (100 * (15/30)) \rightarrow 60 < 50$$

So we need 50 items to be picked in the 15 days, but there are still 60 available, so no replenishment orders need to be generated.

Configuration 2:

- ItemA: Quantity on pick locations = 120
- ItemA: Estimated sales quantity by month = 100
- ItemA: Stock on pick locations = 40
- ItemA: Items on a pick list (in range) = 15
- Generator: Stock coverage = 15

In this example:

$$(40 - 15) < (100 * (15/30)) \rightarrow 25 < 50$$

So we need 50 items to be picked in the 15 days, and there are only 25 available, so replenishment orders need to be generated.

The number of items to be replenished is calculated:

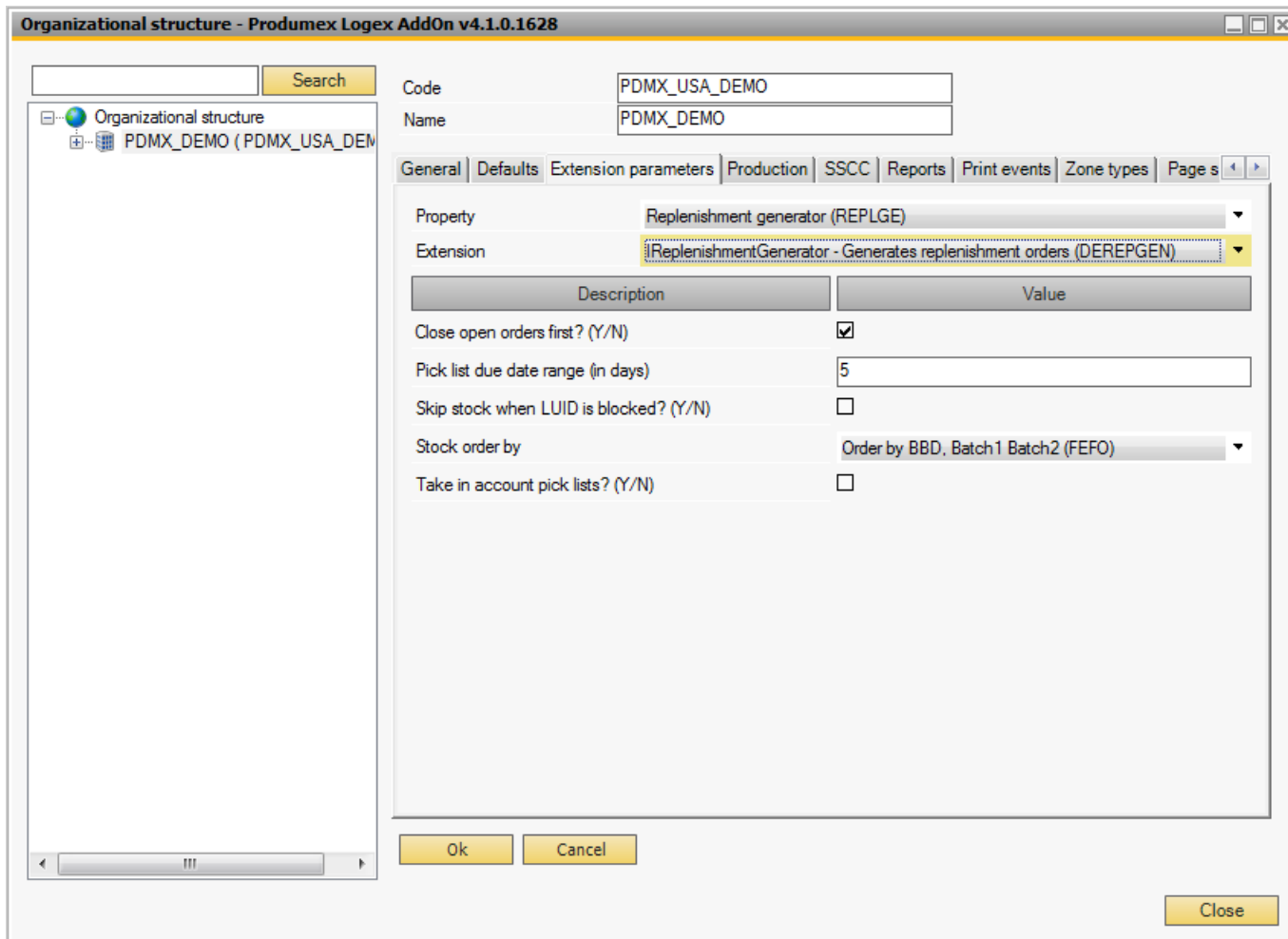
$(\text{Qty on pick locations} - (\text{Stock on pick locations} - \# \text{ on pick list}))$

In this example:

$$(120 - (40 - 15)) = 95$$

So 95 items need to be replenished from bulk locations to pick locations.

IReplenishmentGenerator - Generates replenishment orders



This replenishment generator takes in account the items defined on the pick location. When the stock goes below the minimum quantity, it will generate a replenishment order. The system will create an order so the minimum quantity (*Defined on the location*) is exceeded after the execution of the replenish order. The quantity will be a multiple of the Replenish Qty.

Close open orders first? (Y/N)

When this is checked, the system will first close all open replenishment orders when running the replenishment tool.

Pick list due date range (in days)

If 'Take in account pick lists' is checked, this setting defines the due date range of all the pick lists that should be taken in account.

Skip stock when LUID is blocked? (Y/N)

When this option is checked, the blocked LUID will not be moved to the pick location. This can be used when the system is configured that the pick list proposal generator already locks stock based on the LUID and if on the pick list controller the option to pick full pallet from bulk location is allowed.

Stock order by

The order of the stock to be used:

- Order by BBD, Batch1, Batch2 (FEFO)
- Order by ItriKey, No LUID, LUID (FIFO)

Take in account pick lists? (Y/N)

When this option is checked, items that are on pick lists (*with a due date in range*) will be subtracted

from the current available stock on the location.

5.1.3.51. On release of route controller

None

5.1.3.52. Route controller

RouteController - Controls the routes

The settings below is to customize the grids on the route planning. There is a view to get the data to show on the grid. The order in which the columns are on the view, will also be the order in which they will appear in the grid.

Per view there are some mandatory fields, so the system knows what column to use for certain values.

Pick list (proposals) without route (Bottom-left grid):

Required fields:

- DocType, DocEntry, PickListStatus, PmxWhsCode

View name - Open pick list (proposals)

The name of the route that will be used.

Order by - Open pick list (proposals)

The order by for the view. The text 'ORDER BY' does not need to be entered here.

Localization key - Open pick list (proposals)

The localization key to use. This is used to translate the grid.

Below is a reduced translation tag for the standard grid is.

It shows how to translate, or if needed how to hide a columns.

```
<PmxLocalizationKey>
  <Canceled>False</Canceled>

<LocalizationKey>Logex.AddOn.RoutePlanningControl.GrdPicklistsWithoutRoute</LocalizationKey>
  <ApplicationTypeCode>SBOGUIAP</ApplicationTypeCode>
  <LocalizationProperties>
    <PmxLocalizationProperty>
      <Canceled>False</Canceled>
      <LocalizationProperty>Columns[1].HeaderText</LocalizationProperty>
      <ExtensionCode>CONVSTR</ExtensionCode>
      <LocalizationValues>
        <PmxLocalizationValue>
          <Canceled>False</Canceled>
          <LocalizationValue>Type</LocalizationValue>
          <LanguageCode>3</LanguageCode>
```



```

    </PmxLocalizationValue>
    <PmxLocalizationValue>
      <Canceled>False</Canceled>
      <LocalizationValue>Type</LocalizationValue>
      <LanguageCode>16</LanguageCode>
    </PmxLocalizationValue>
  </LocalizationValues>
</PmxLocalizationProperty>
<PmxLocalizationProperty>
  <Canceled>False</Canceled>
  <LocalizationProperty>Columns[13].Visible</LocalizationProperty>
  <ExtensionCode>CONVB00L</ExtensionCode>
  <LocalizationValues>
    <PmxLocalizationValue>
      <Canceled>False</Canceled>
      <LocalizationValue>False</LocalizationValue>
      <LanguageCode>3</LanguageCode>
    </PmxLocalizationValue>
    <PmxLocalizationValue>
      <Canceled>False</Canceled>
      <LocalizationValue>False</LocalizationValue>
      <LanguageCode>16</LanguageCode>
    </PmxLocalizationValue>
  </LocalizationValues>
</PmxLocalizationProperty>
</LocalizationProperties>
</PmxLocalizationKey>

```

Route details (Right grids):

Required fields:

- RouteDocEntry, RouteLineNum, Sequence, DocType, DocEntry, PickListStatus

View name -Route details

The name of the route that will be used.

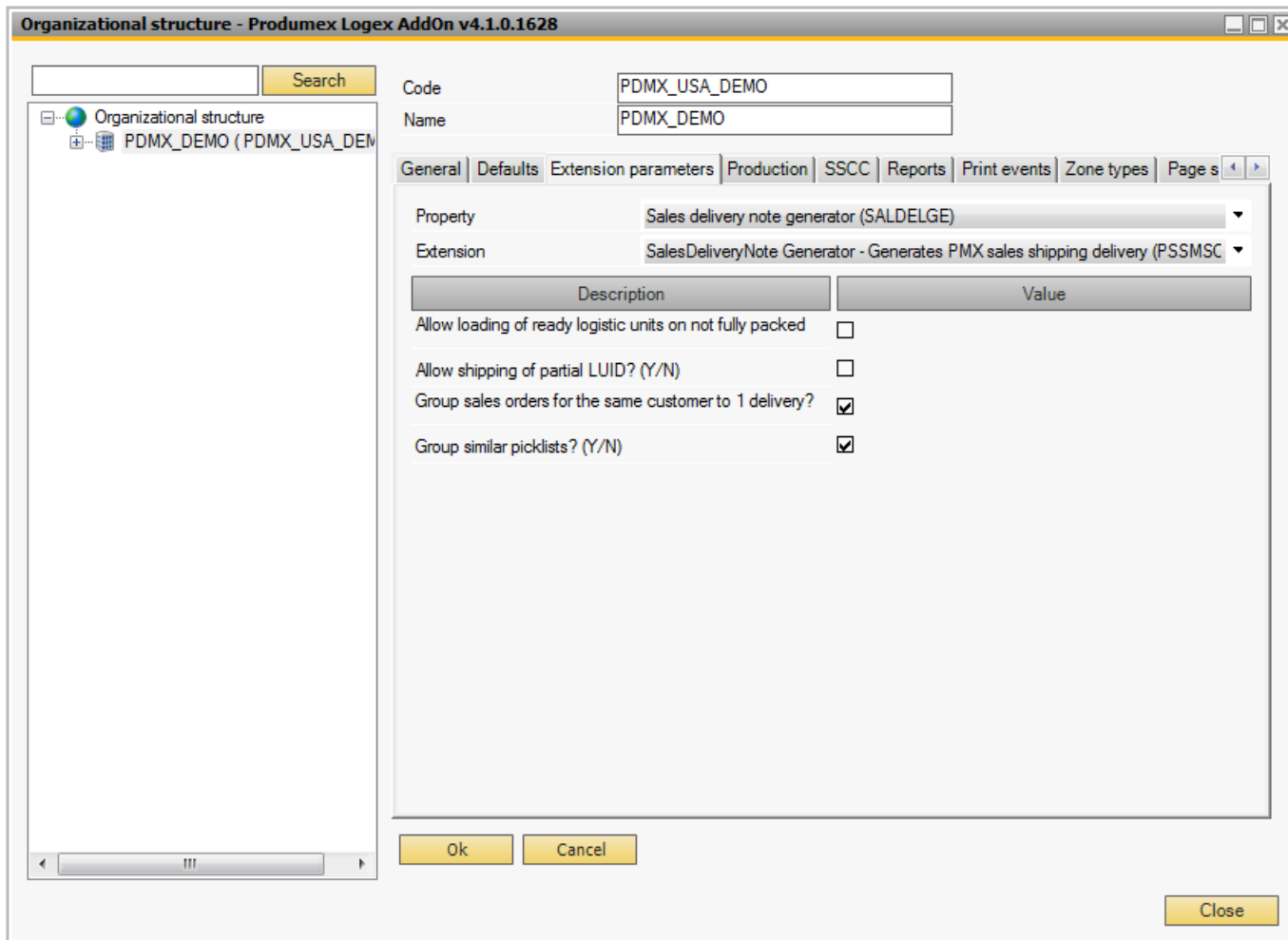
Localization key - Route details

The localization key to use. This is used to translate the grid.

5.1.3.53. Sales delivery note generator

SalesDeliveryNote Generator - Generates PMX sales shipping delivery

This functionality will book the delivery into a temporary table. The SAP sales delivery can be created through a tool, or manually in SAP.



Allow loading of ready logistic units on not fully packed picklists? (Y/N)

If set to true, the users will be able to already select an unfinished picklist on the shipping client, and already start loading finished SSCC's.

Allow shipping of partial LUID? (Y/N)

If set to true, on the shipping flow, a button will be available to only ship a part of a picked SSCC. The remainder will still be open on the pick list.

Group sales orders for the same customer to 1 delivery? (Y/N)

When the delivery is made, it is possible according to the type of shipping: wave/route/... that there are goods that come from different sales orders, for the same customer.

If the option is set to true, only 1 delivery will be made for those sales orders.

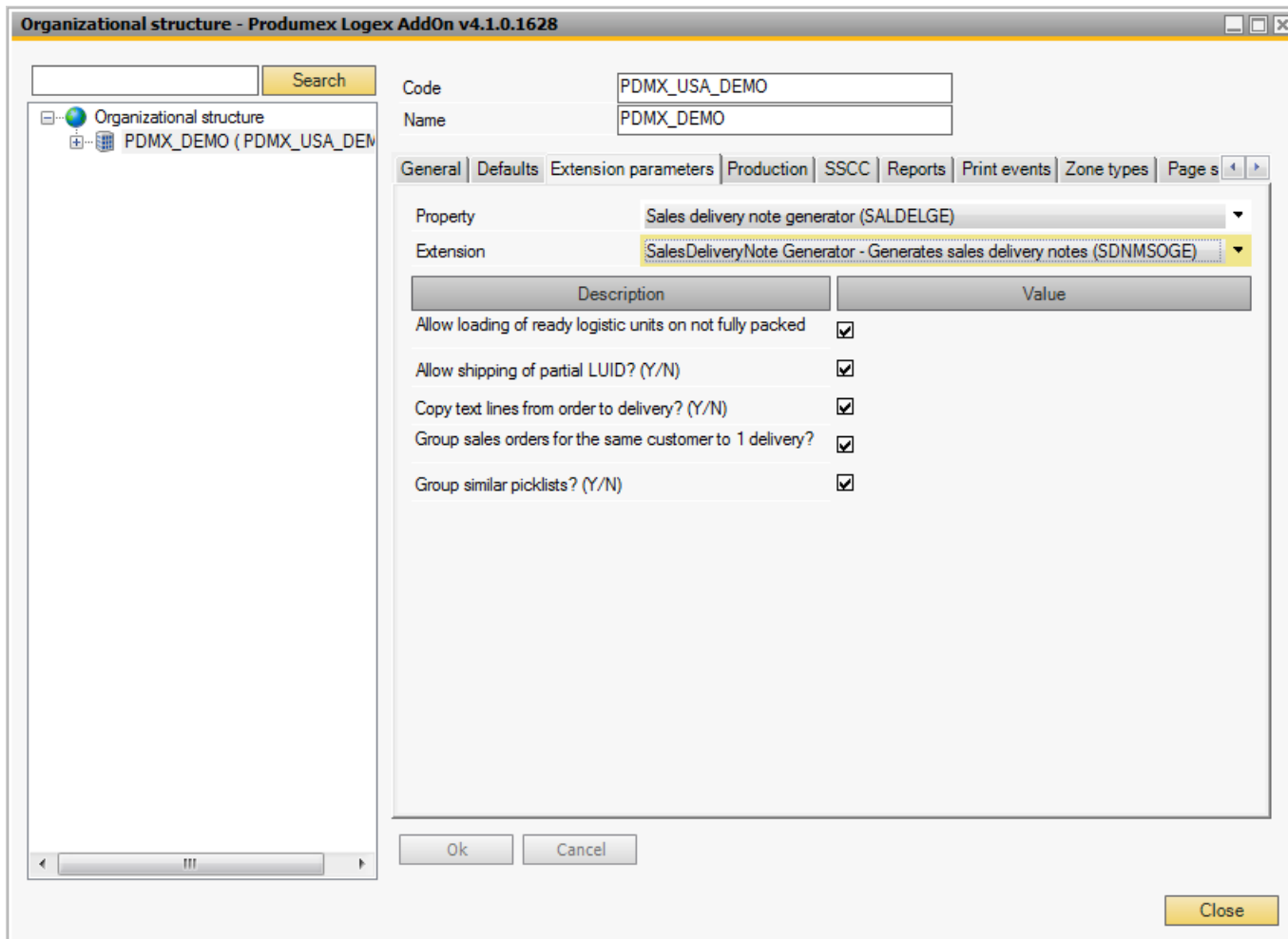
If set to false, a delivery by sales order will be made.

Group similar picklists? (Y/N)

If set to true, during shipping the system will get all picklists that are available for the same customer, delivery address, ... for the selected pick list.

All SSCC's for those pick lists can be loaded.

SalesDeliveryNote Generator - Generates sales delivery notes



Allow loading of ready logistic units on not fully packed picklists? (Y/N)

If set to true, the users will be able to already select an unfinished picklist on the shipping client, and already start loading finished SSCC's.

Allow shipping of partial LUID? (Y/N)

If set to true, on the shipping flow, a button will be available to only ship a part of a picked SSCC. The remainder will still be open on the pick list.

Copy text lines from order to delivery? (Y/N)

If set to true, text lines from the base document will be copied to the delivery.

Group sales orders for the same customer to 1 delivery? (Y/N)

When the delivery is made, it is possible according to the type of shipping: wave/route/... that there are goods that come from different sales orders, for the same customer.

If the option is set to true, only 1 delivery will be made for those sales orders.

If set to false, a delivery by sales order will be made.

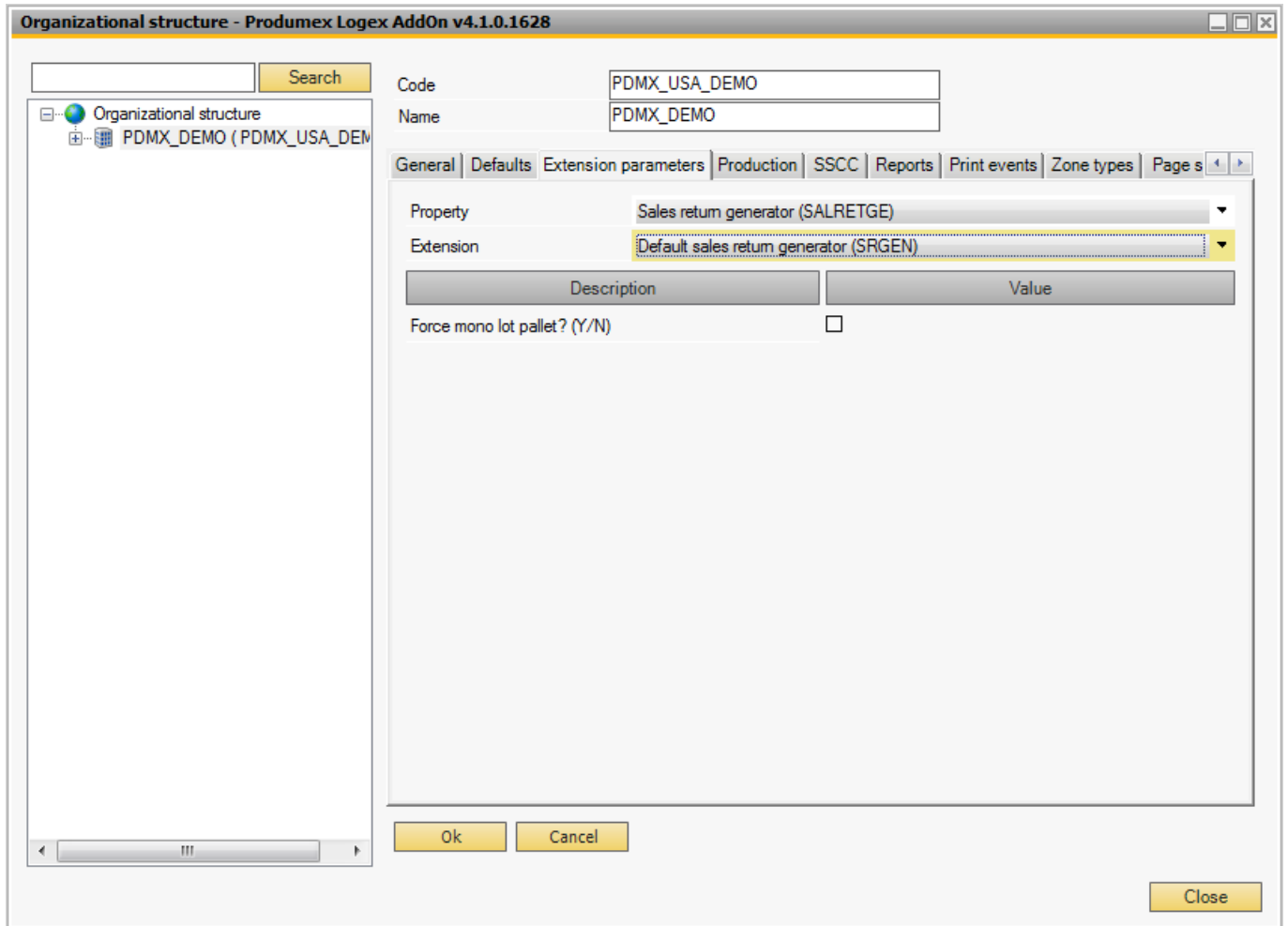
Group similar picklists? (Y/N)

If set to true, during shipping the system will get all picklists that are available for the same customer, delivery address, ... for the selected pick list.

All SSCC's for those pick lists can to be loaded.

5.1.3.54. Sales return generator

Default sales return generator

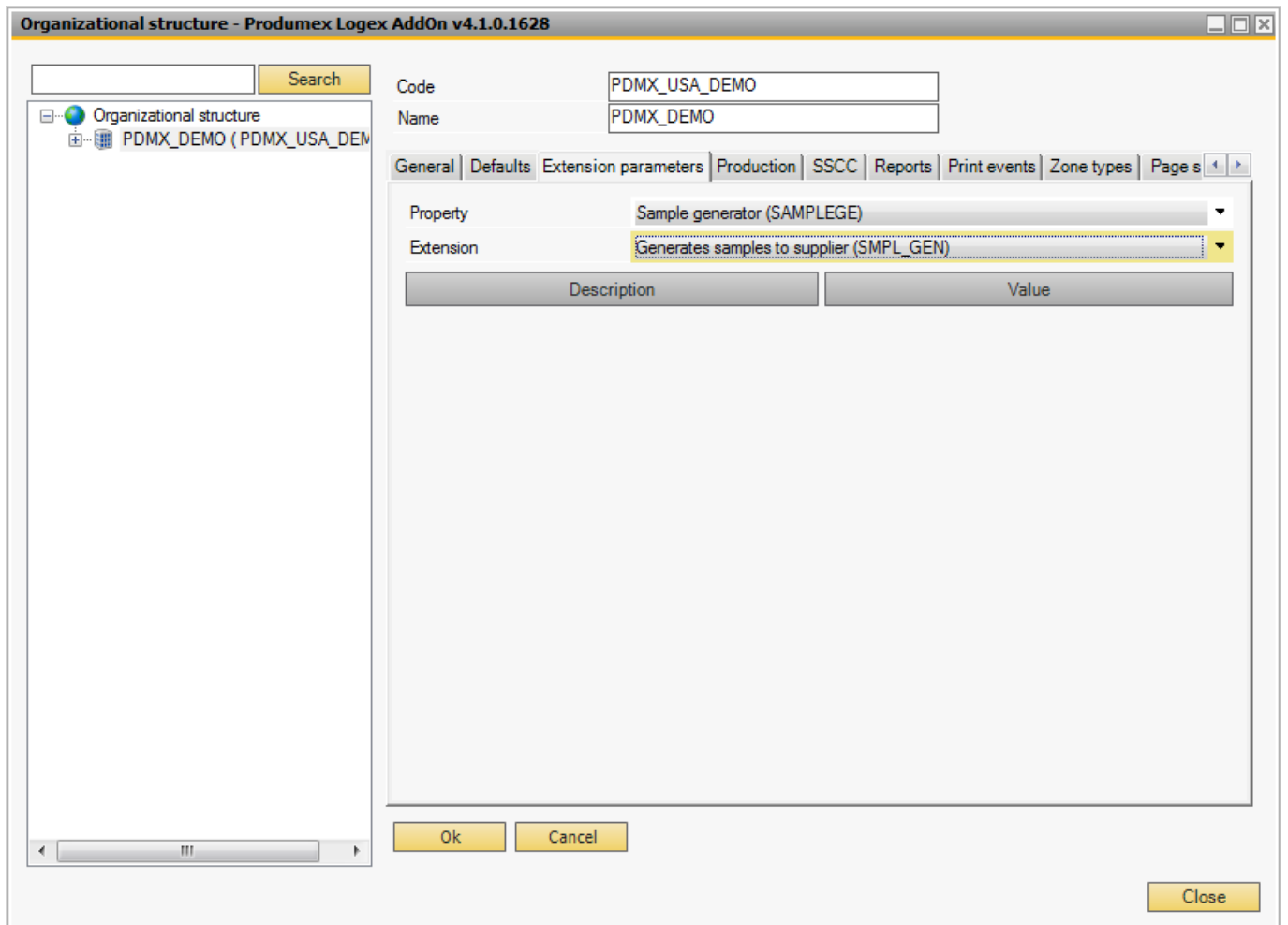


Force mono lot pallet? (Y/N)

If set to true, the system will not allow to have multiple items/batches on one SSCC. SO the user is forced to create a new logistic unit for each item.

5.1.3.55. Sample generator

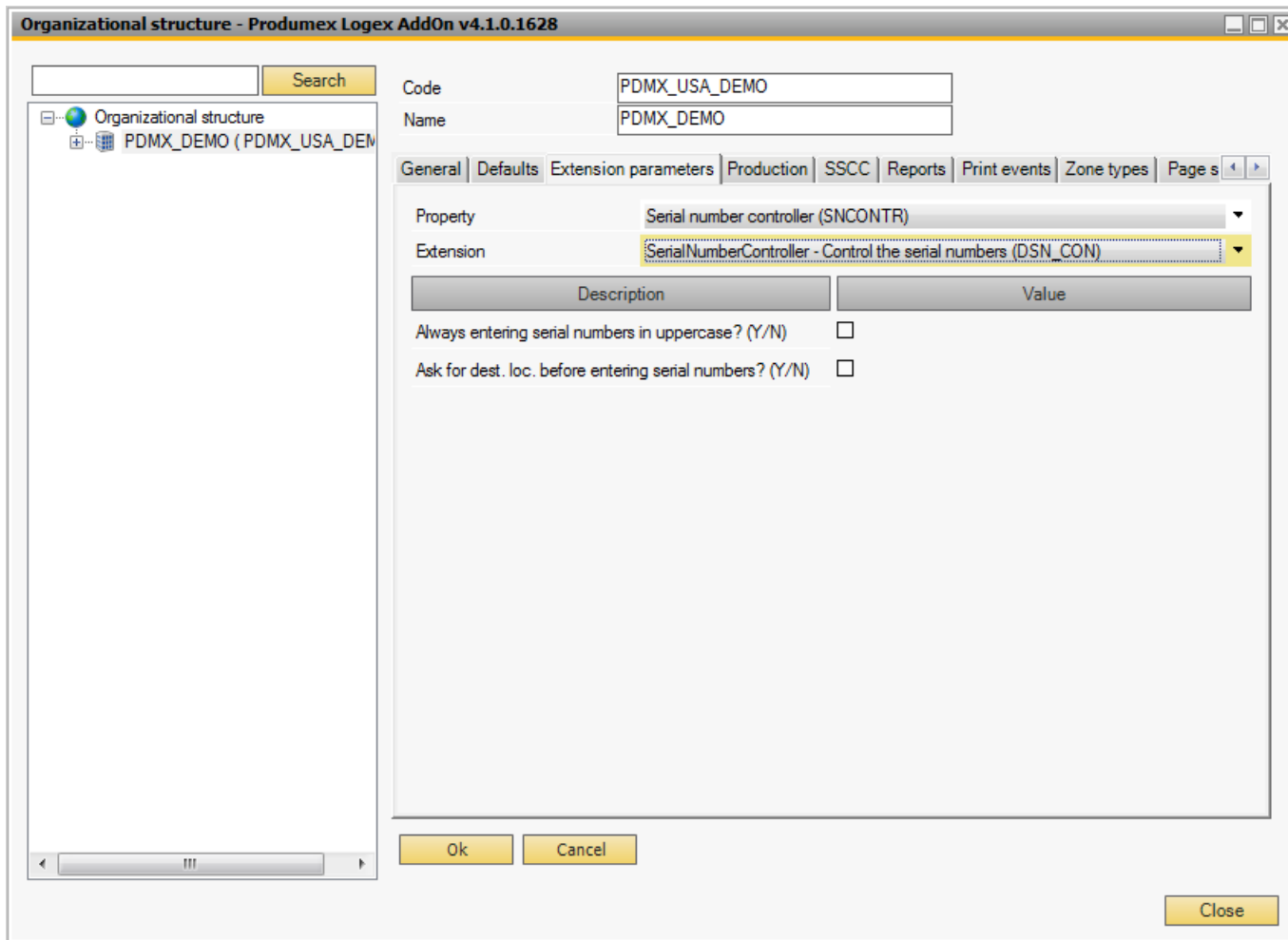
Generates samples to supplier



This generator makes the sample orders if this is needed. A sample order is a sales order. This sales order will be created for the customer linked to the business partner on the purchase delivery. The linked business partner can be set on the business partner master data.

5.1.3.56. Serial number controller

SerialNumberController - Control the serial numbers



Always entering serial numbers in uppercase? (Y/N)

If set to true, the system will always put the entered serial numbers in upper case.

Ask for dest. loc. before entering serial numbers? (Y/N)

When moving stock, the system normally first asks to scan the serial numbers before asking for the location.

If the user wants to first ask for the destination location, this option can be set.

5.1.3.57. Warehouse automation controller

None

5.1.3.58. Move controller

Default move controller

Return to next move when performing ad hoc move? (Y/N)

If set to true, the system will go back to a screen to perform the next move instead of going back to the start of the ad hoc move flow. This allows the user to quickly perform another move of the same type without entering again if it is a local move, select destination whs, ...

5.1.3.59. Stock allocation controller

Controller for the stock allocation screen

This controller holds the configuration for the Stock Allocation Screen.

The screen supports custom views that are used to show data on the screen.

This can be used when customers want additional info on the screen.

But that custom view will have some fields that are required.

Grid localization key (Customer info)

The translation key that is used to translate the grid on the screen for grouping option 'Customer'

Grid localization key (Sales order info)

The translation key that is used to translate the grid on the screen for grouping option 'Sales document'

Order by (Customer info)

The order by clause for the query for grouping option 'Customer'

Order by (Sales order info)

The order by clause for the query for grouping option 'Sales document'

View name (Customer info)

The view used for grouping option 'Customer'.

The view can be customized, but the following fields are required:

- ItemCode
- SboWhsCode
- GroupCode
- CardCode
- CardName
- AllocatedQuantity
- AllocatedQuantityOriginal
- FreeQuantity
- FreeQuantityOriginal
- InventoryQuantity
- OpenQuantity
- OpenQuantityNotAllocated
- ErrorMessage

View name (Sales order info)

The view used for grouping option 'Sales document'.

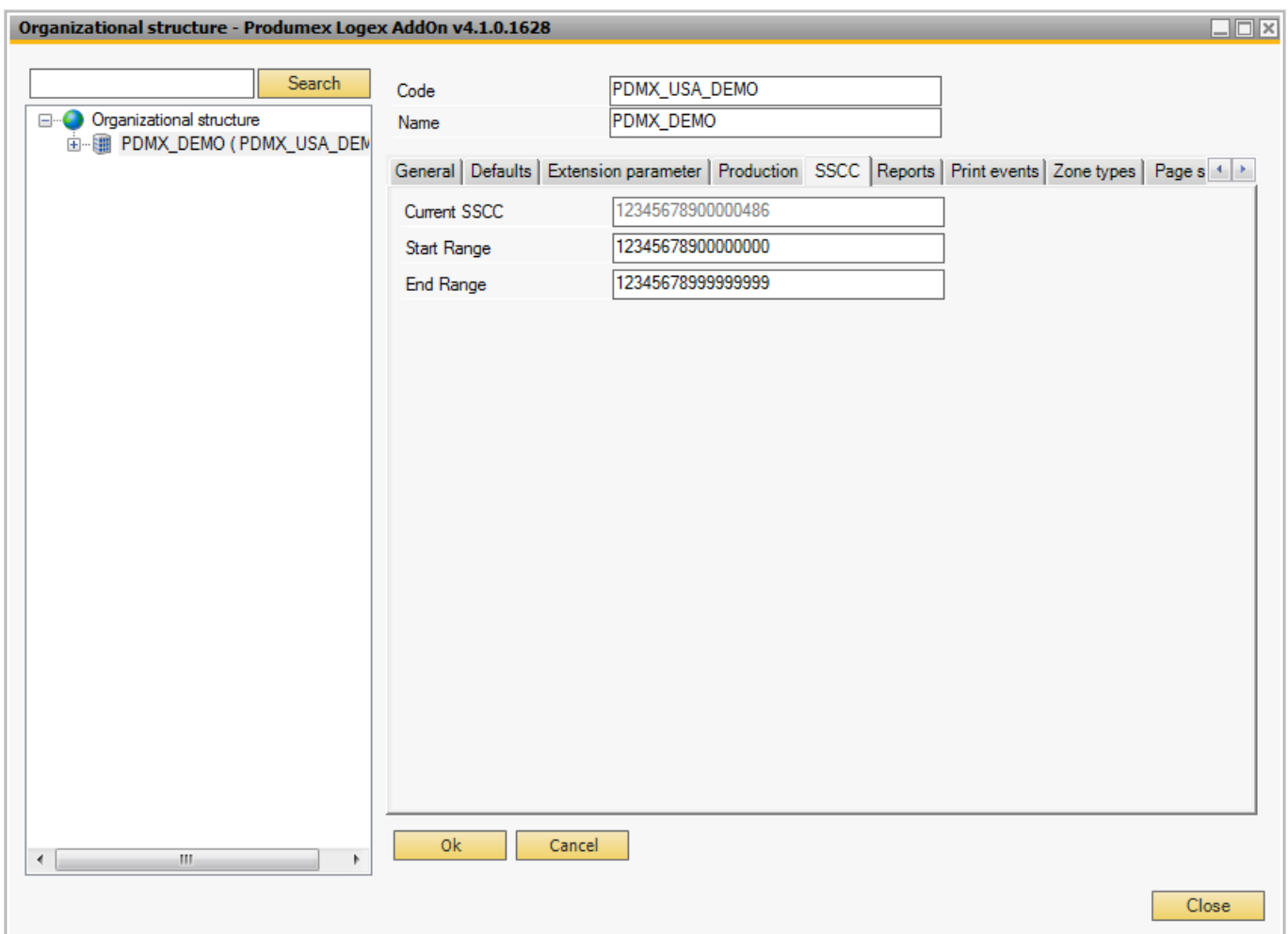
The view can be customized, but the following fields are required:

- ItemCode
- SboWhsCode
- GroupCode
- CardCode
- CardName
- AllocatedQuantity
- AllocatedQuantityOriginal
- FreeQuantity
- FreeQuantityOriginal

- InventoryQuantity
- OpenQuantity
- OpenQuantityNotAllocated
- ObjType
- DocEntry
- LineNum
- ErrorMessage

5.1.4. SSCC

In the SSCC (*Serial Shipping Container Code*) settings screen, the system shows the actual SSCC number, as well as the start and end number of the range.

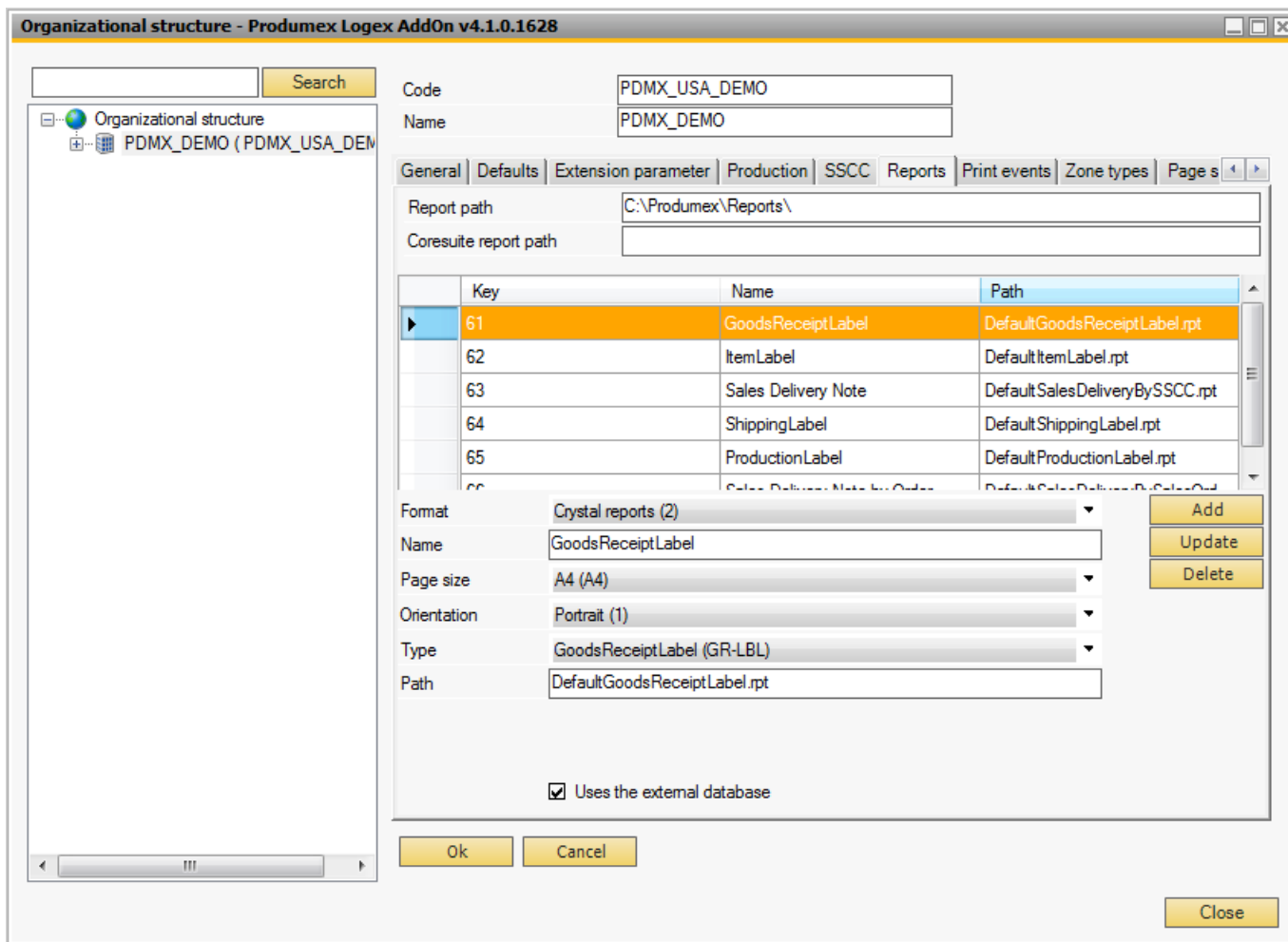


5.1.5. Reports

The reports tab offers an overview of the standard reports that have been defined in PDMX.

- This also includes a reference to the shared folder (*report path*) where the reports are stored as well as the report parameters (*name, path from the entered report path, page size, orientation, type of report and the format in which the report is created (Crystal Reports, CoreSuite)*)

- **“Uses the external database”**: as it is not allowed to store “Stored Procedures” in the SAP Business One databases, an external Produmex database has been created which contains the stored procedures that are required to generate the reports.



5.1.5.1. Crystal Report

This functionality uses reports located at the 'Report path'.

5.1.5.2. Crystal report by SAP

This functionality uses the default reports that are stored within SAP.

To configure this, you first need to know the ID of the report.

Next this ID needs to be stored in the field Path.

When the system will need to print, it will get the report with that ID from the database.

5.1.5.3. Coresuite

This will use the reports available in Coresuite.

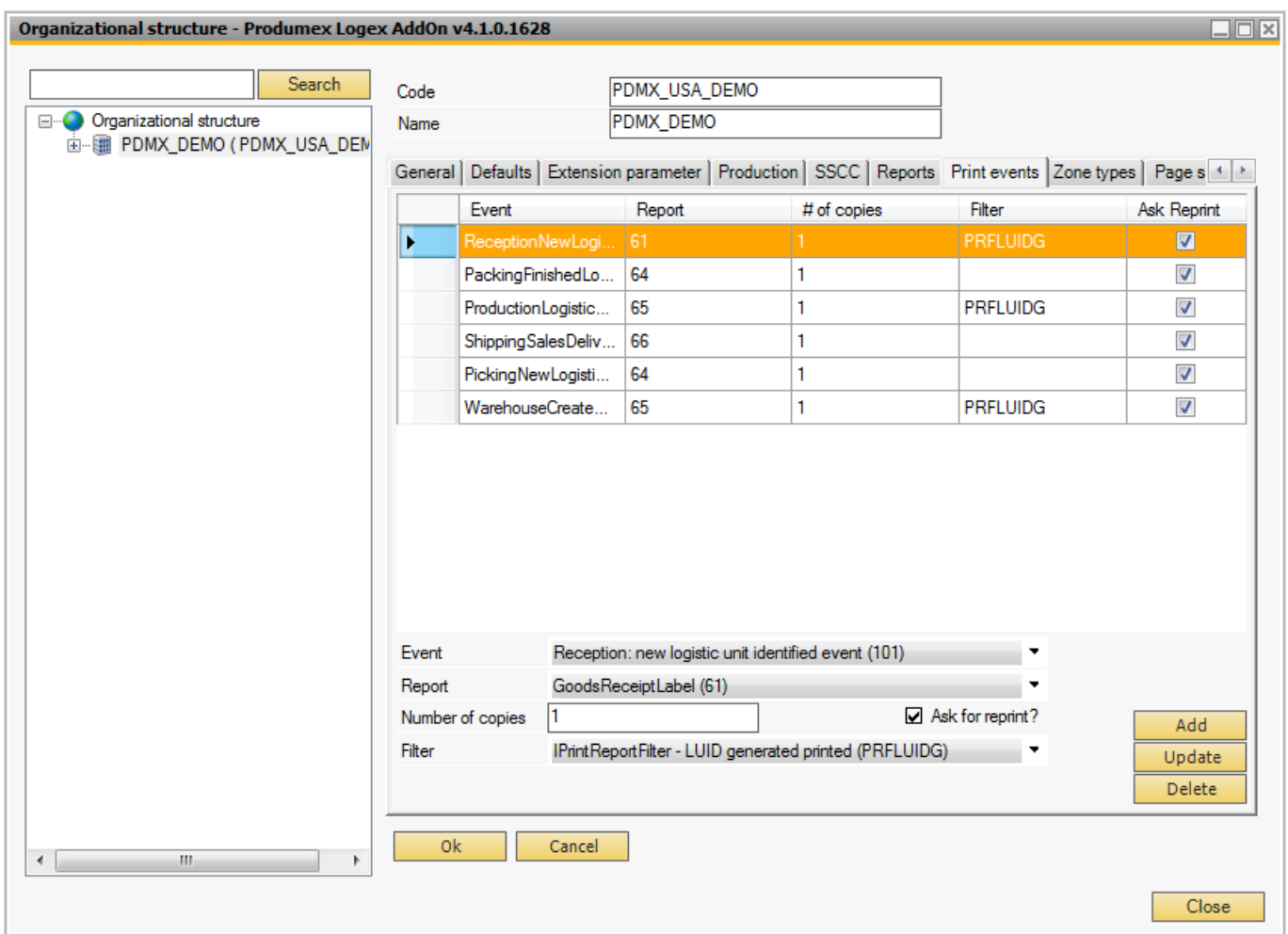
When printing the system will create a file to a certain folder.
The field Coresuite report path need to be filled in with a folder where the file needs to be stored.

The Coresuite add-on will pick up the file and print the report.

5.1.5.4. Unknown

Used for custom reports types.

5.1.6. Print events



In the “Print events” you can indicate which report has to be generated on which event. These events are defined upon configuration of PDMX. At that moment the report that has to be printed upon the occurrence of an event can be defined, as well as the number of copies and the condition (filter) that has to be met for the report to be generated.

The filter “PRFLUIDG” determines that when a logistic unit is received with a valid logistic label containing an SSCC, the system will NOT generate a new reception label with a new system-generated SSCC.

The filter “PRFWMM” can be used for warehouse move documents. It will use the settings on the

Warehouse move Matrix UDT to check whether a document should be printed.

The filter “PRFSCRIP” offers users the possibility to develop own criteria for determining when and how a label should be printed.

5.1.6.1. Scripted print filters

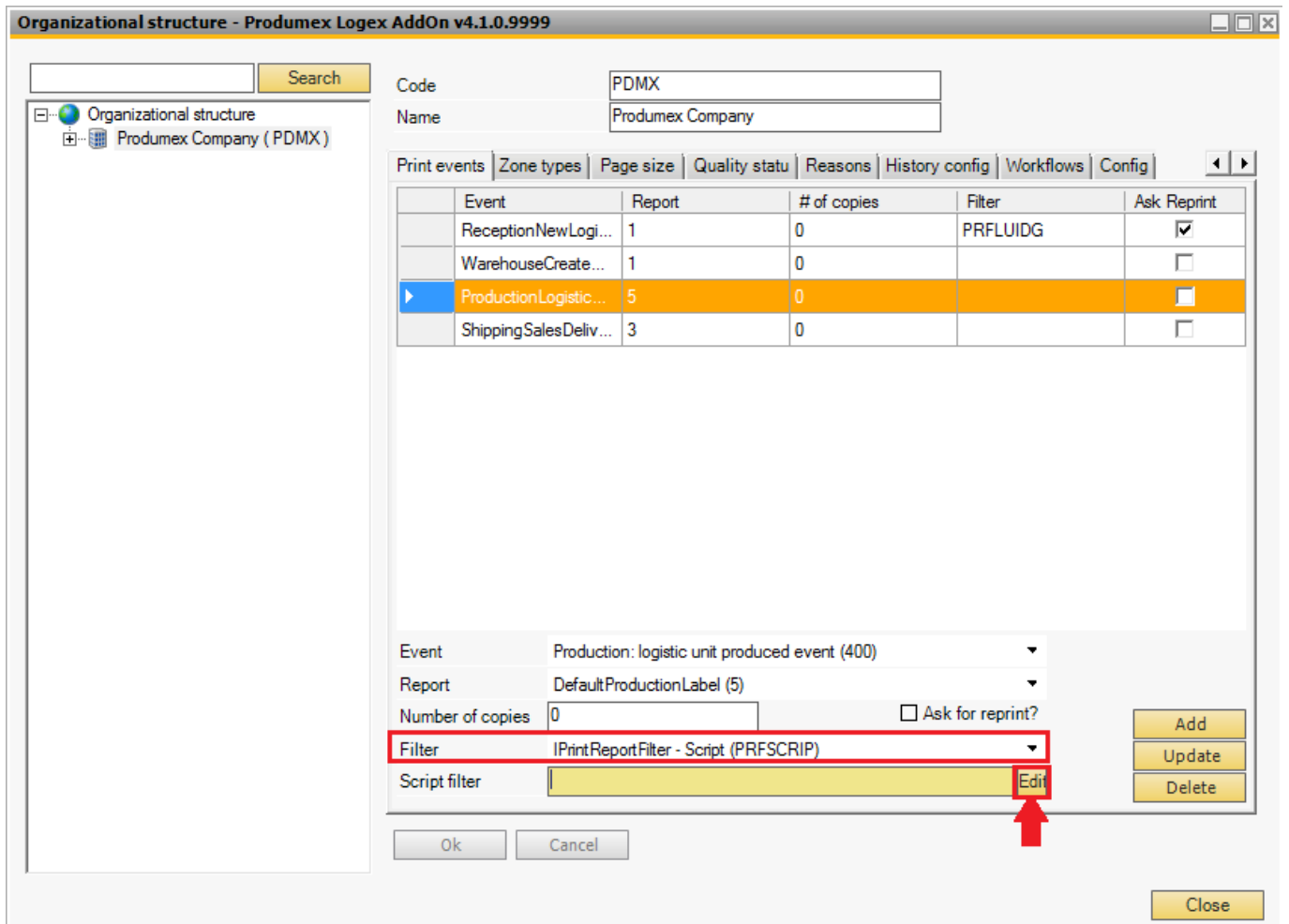
It is possible to define a custom print filter. It will allow to block printing for certain parameters.

A typical print filter consists of 3 main sections

- Running of SELECT QUERY to get needed info for document
- Determination of TRUE or FALSE value according to needed info
- Return RESULT

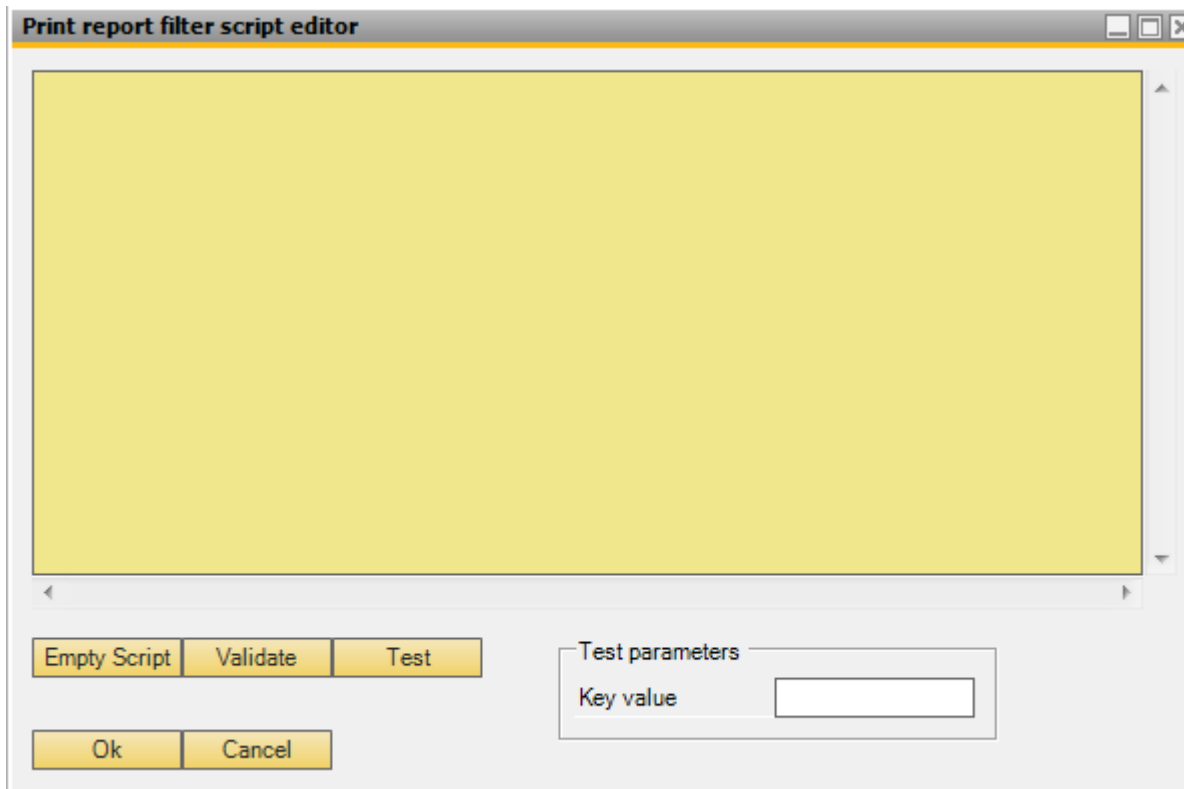
1. Creation of a new print filter

In the Produmex Organizational Structure, go to the Print Events tab:



Here you can add a filter to the desired print event.
Select Filter → IPrintReportFilter - Script (PRFSCRIPT)
Then select the 'Edit' button.

The following script editor opens, here we will paste our script.



Here you can find a demonstration script that explains what is needed.

```
using System;
using System.Reflection;
using Produmex.Foundation.Data.Sbo;
using Produmex.Foundation.Diagnostics;
using Produmex.Sbo.Logex.Data.BusinessObjects;
using Produmex.Sbo.Logex.Data.Providers;
using Produmex.Foundation.Data.Sbo.BusinessObjects;
using Produmex.Foundation.Data.Sbo.Utilities;
using Produmex.Foundation.Data.SqlClient;

public class Script
{
    private static readonly ILog s_log =
LogProvider.GetLogger(MethodInfo.GetCurrentMethod().DeclaringType);

    public static bool PrintReport(PmxPrintReportEventType eventType, int
key, PmxDbConnection dbConn)
    {
        //Create the query you want to use
        string query = "SELECT [COLUMNNAME1], [COLUMNNAME2] FROM [TABLENAME]
WHERE [Key] = "
+ key.ToString();

        //Run the query
        using (ISboRecordset rs = SboRecordsetHelper.RunQuery(s_log, query,
dbConn))
```

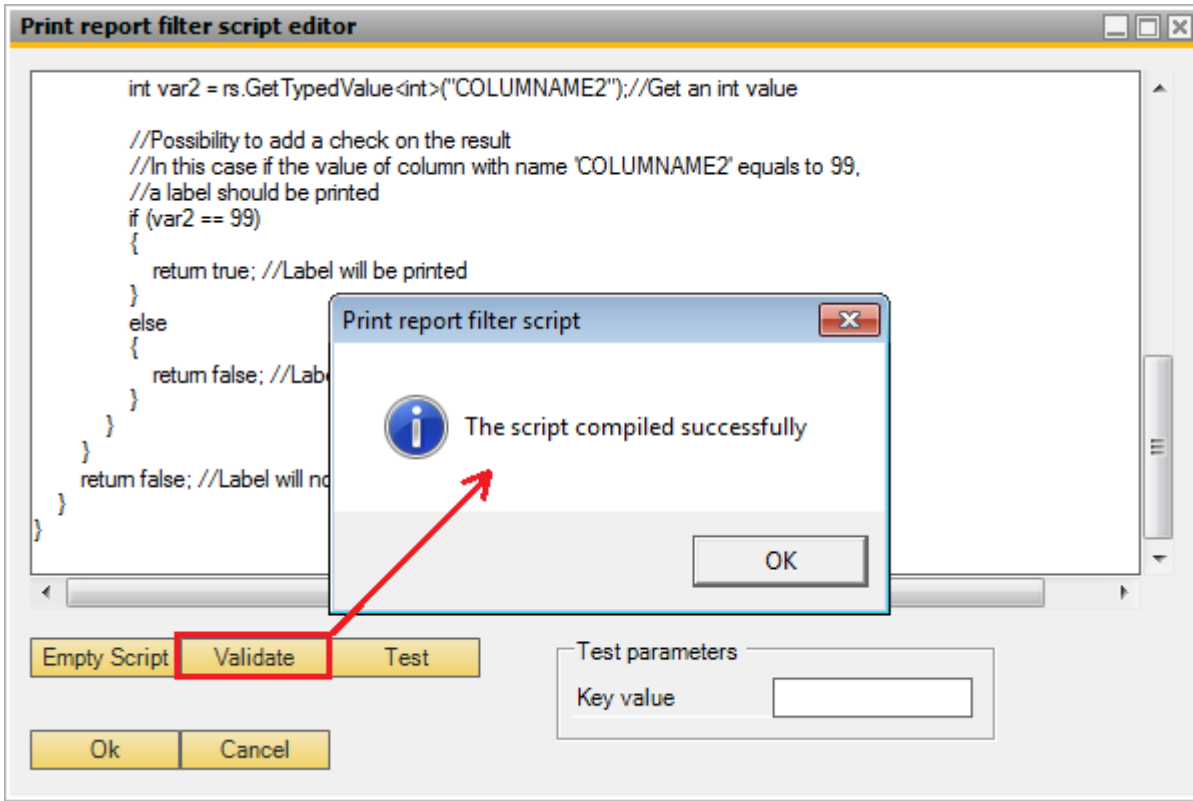
```
    {
        if (!rs.EOF)//Check if you get result from the query
        {
            string var1 = rs.GetTypedValue<string>("COLUMNNAME");//Get a
string value
            int var2 = rs.GetTypedValue<int>("COLUMNNAME2");//Get an int
value

            //Possibility to add a check on the result
            //In this case if the value of column with name 'COLUMNNAME2'
equals to 99,
            //a label should be printed
            if (var2 == 99)
            {
                return true; //Label will be printed
            }
            else
            {
                return false; //Label will not be printed
            }
        }
    }
    return false; //Label will not be printed
}
}
```

So you can modify this script to fit your needs:

- Modify the query to lookup the needed info
- Get the needed values from the query result
- Modify the check on the result and return the correct TRUE or FALSE

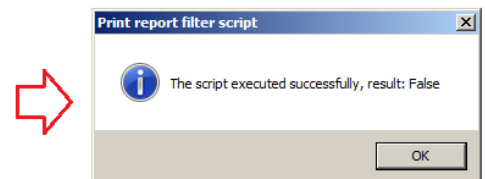
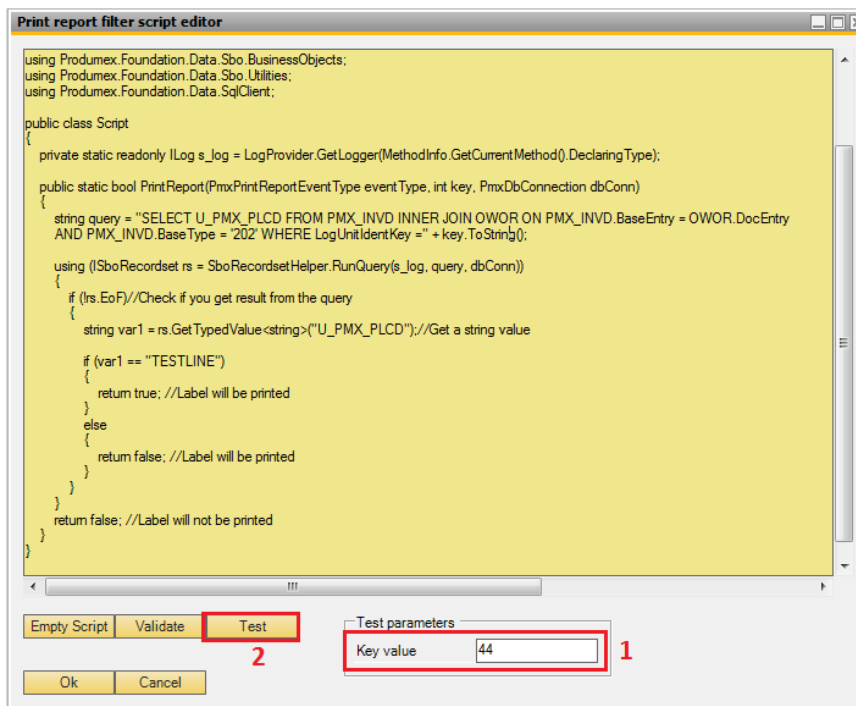
2. Validate and test



You can also use this screen to:

- Validate the Script
- Do a test run with a KEY from the database :

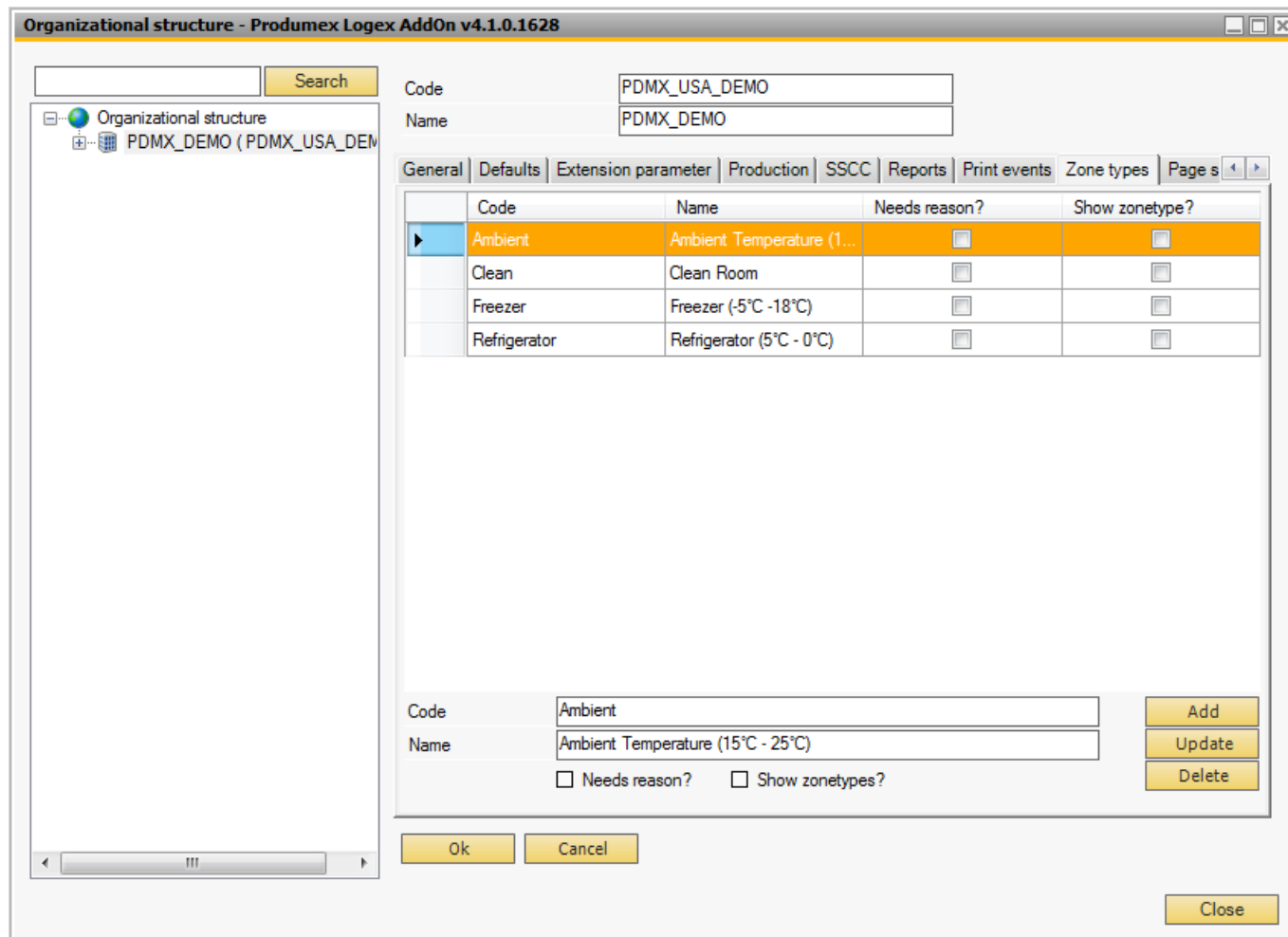
The key is what is passed to the report. So for the print event `ProductionLogisticUnitProduced` this is the LUID of the produced pallet.



5.1.7. Zone types

The “Zone types” tab allows you to define the various zones types in your company that can be assigned afterwards to specific items, depending on their storage conditions.

Once a zone type is created it remains possible to change and update its name (description) but not its code.



Needs reason

If ticked you will have to enter a reason when receiving this item. This can be used to confirm that specific conditions were met when receiving the item. For example the item needs to be stored below 5° Celsius and it arrives at 10 ° You would enter that conditions were not ok.

Show zonetype?

If ticked the zone type will show at reception of an item.

5.1.8. Page sizes

The “Page sizes” tab allows you to define the used page sizes for reports and printers.

Once created it is possible to change the name (description) of a page size but not its code.

5.1.9. Quality status

The “Quality status” allows you to define the applicable quality statuses for your company. For each quality status it is possible to define whether or not an item with that specific quality status can be shipped and/or picked for production and/or picked for a replenishment order. Furthermore you can specify to which quality status a specific status can be changed: e.g. “blocked” can be changed to “released”.

Code	Name
BLOCKED	Blocked
IMPORT	Import
QUARANTI	Quarantine
REJECTED	Rejected
RELEASED	Released
RETURNED	Returned
SUQ	Shipping under quarantine

Code	<input type="text" value="BLOCKED"/>	<input type="button" value="Add"/>
Name	<input type="text" value="Blocked"/>	<input type="button" value="Update"/>
<input type="checkbox"/> Can be shipped <input type="checkbox"/> Can be put on a pick location		<input type="button" value="Delete"/>
<input type="checkbox"/> Can be picked for replenishment <input type="checkbox"/> Can be shipped under quarantine		
<input checked="" type="checkbox"/> Can be picked for production		
<input type="checkbox"/> Can be used for production		
The quality status can go to these quality statuses		
<input type="checkbox"/>	RELEASED	<input type="checkbox"/> Ask for reason?
Released (RELEASED)		<input type="button" value="Delete"/>
<input type="checkbox"/> Ask for reason		<input type="button" value="Add"/>
		<input type="button" value="Update"/>

Ask for reason

On the transition between quality statuses the user can set whether a reason needs to be entered for the change.

Can be shipped

The quality status is allowed to be picked and shipped.

Can be picked for replenishment

Indicates if the stock can be used to replenish pick locations.

Can be picked for production

Indicates if the stock can be used pick for production.

Can be used for production

Indicates if the stock can be used for production. Stock that does not have this option, are not allowed to be stored on production lines.

Can be put on a pick location

Indicates if the stock can be stored on pick locations.

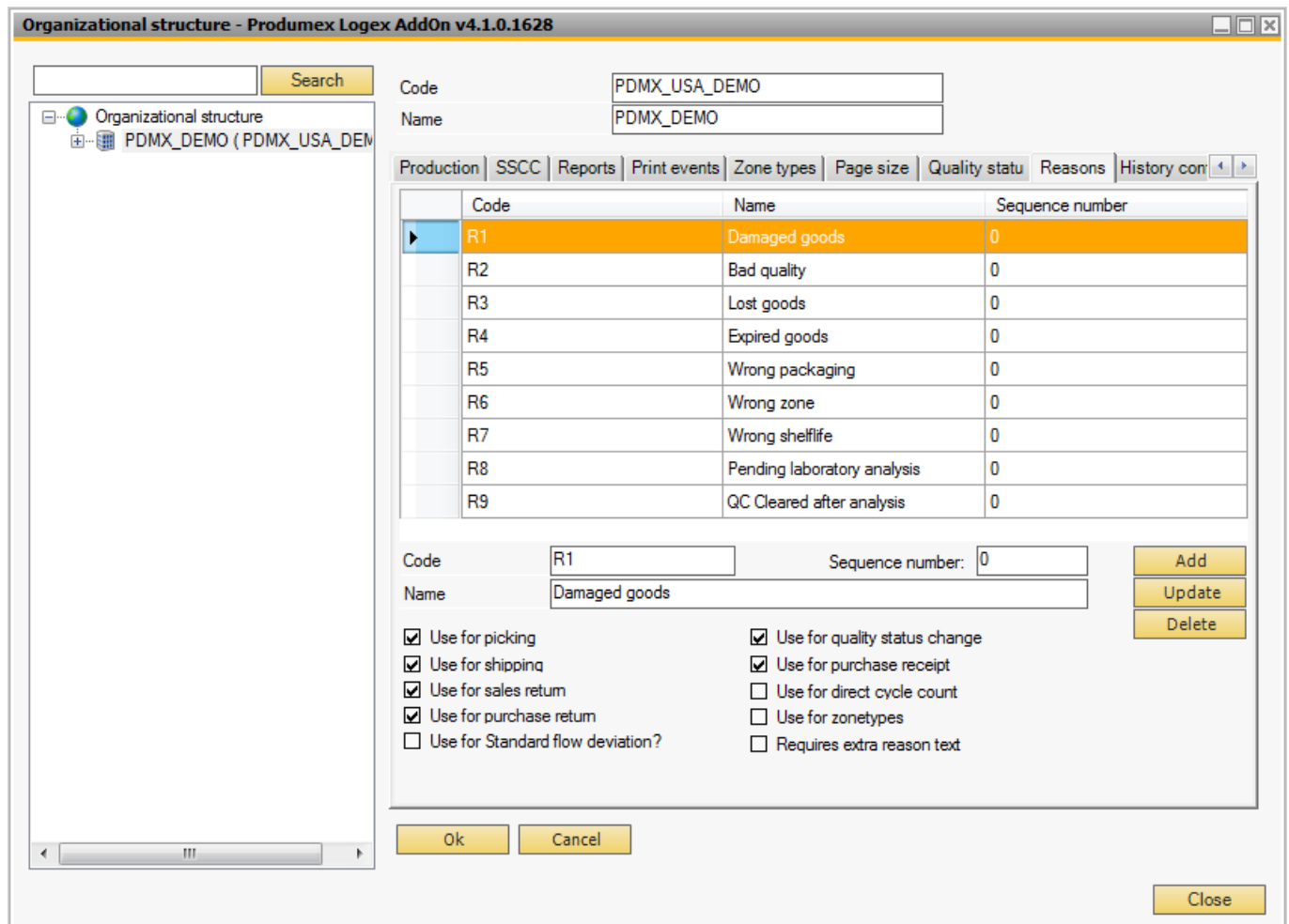
Can be shipped under quarantine

Indicates that the stock is in quarantine, but still allowed to ship. Setting ‘Shipping quality option’ on the sales order line can be changed to allow shipment of these goods.

5.1.10. Reasons

The “Reasons” tab offers the possibility to define the reasons that can be selected for picking and/or shipping and/or sales/purchase return when a specific action cannot be completed or a specific item cannot be used.

The sequence number is the order the reason is shown on the terminals.

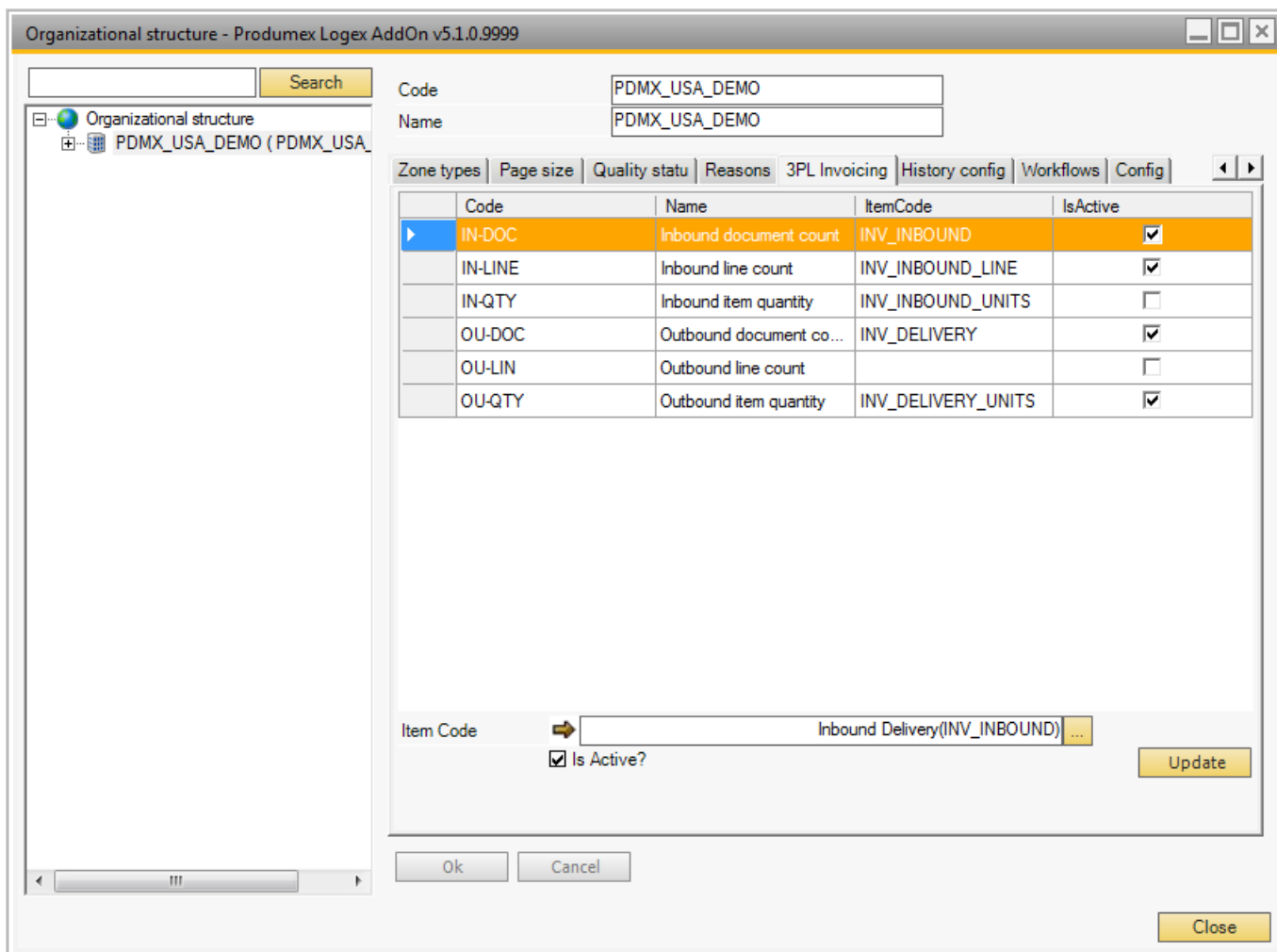


5.1.11. 3PL invoicing

The “3PL invoicing” tab offers the possibility to define which items will be used on the A/R invoices sent to the 3PL customers. 6 items can be defined, each corresponding to one kind of 3PL price calculation:

- ‘Inbound document count’: price depending on the number of Goods Receipt PO’s
- ‘Inbound line count’: price depending on the number of lines in Goods Receipt PO’s
- ‘Inbound item quantity’: price depending on the item quantities received
- ‘Outbound document count’: price depending on the number of sales deliveries
- ‘Outbound line count’: price depending on the number of lines in sales deliveries
- ‘Outbound item quantity’: price depending on the item quantities delivered

Only non-inventory items can be selected. Each item can be enabled or disabled; prices corresponding to disabled items will not be added to the 3PL invoices.

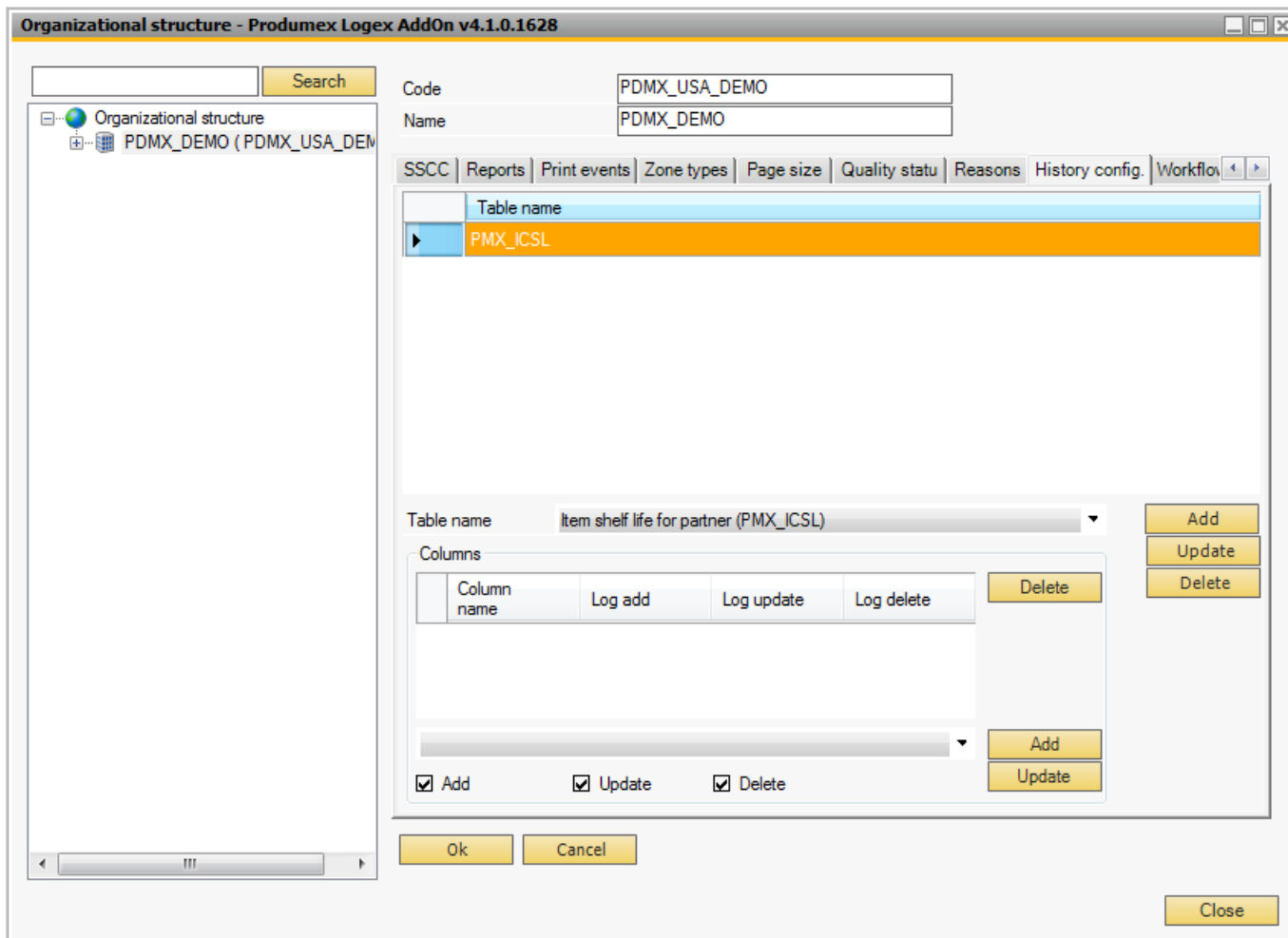


In addition to these 6 kinds of 3PL price calculations, it’s also possible to define 3PL price calculations based on the storage per location type. See Location Types section for more details.

5.1.12. History configuration

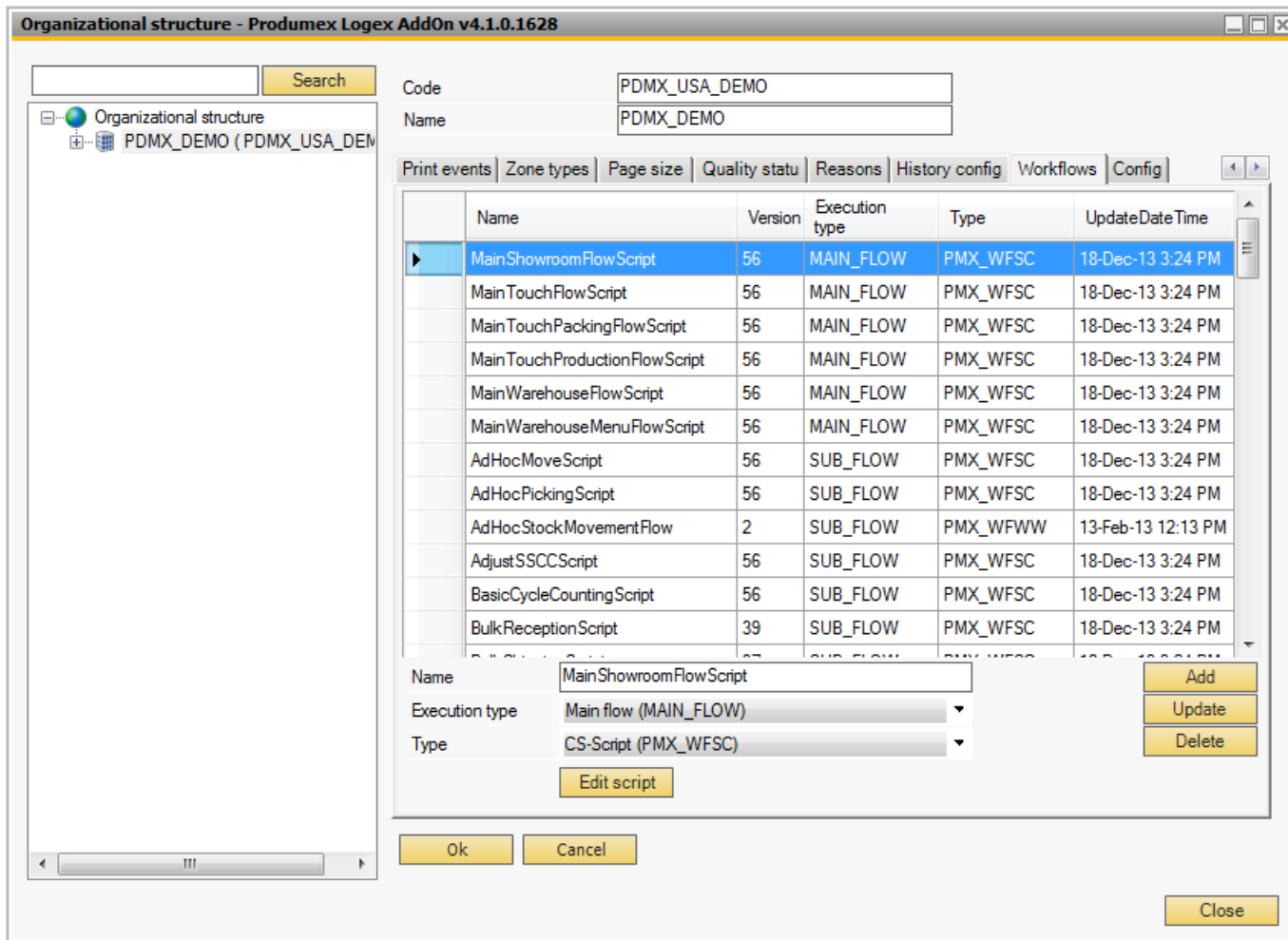
The “History config.” tab offers the possibility to define for which elements or aspects (which are stored in individual database tables) the changes have to be tracked in the context of Audit Trail. This can be changes to characteristics of specific Organizational Structure Elements (e.g. a bin, a zone, a

production line, ...) which need to be tracked, such as their name, zone type code, ... It may also be necessary to track changes to specific characteristics of items, such as e.g. the shelf life of an item for the various business partners of a company. This is shown in the example below, where it has been configured that for the table "Item shelf life for partner" it has to be recorded when the shelf life for a specific item for a specific business partner is added, updated or deleted. These changes will then be tracked by the Produmex Office function "Audit Trail".



5.1.13. Workflows

Overview of the used workflows

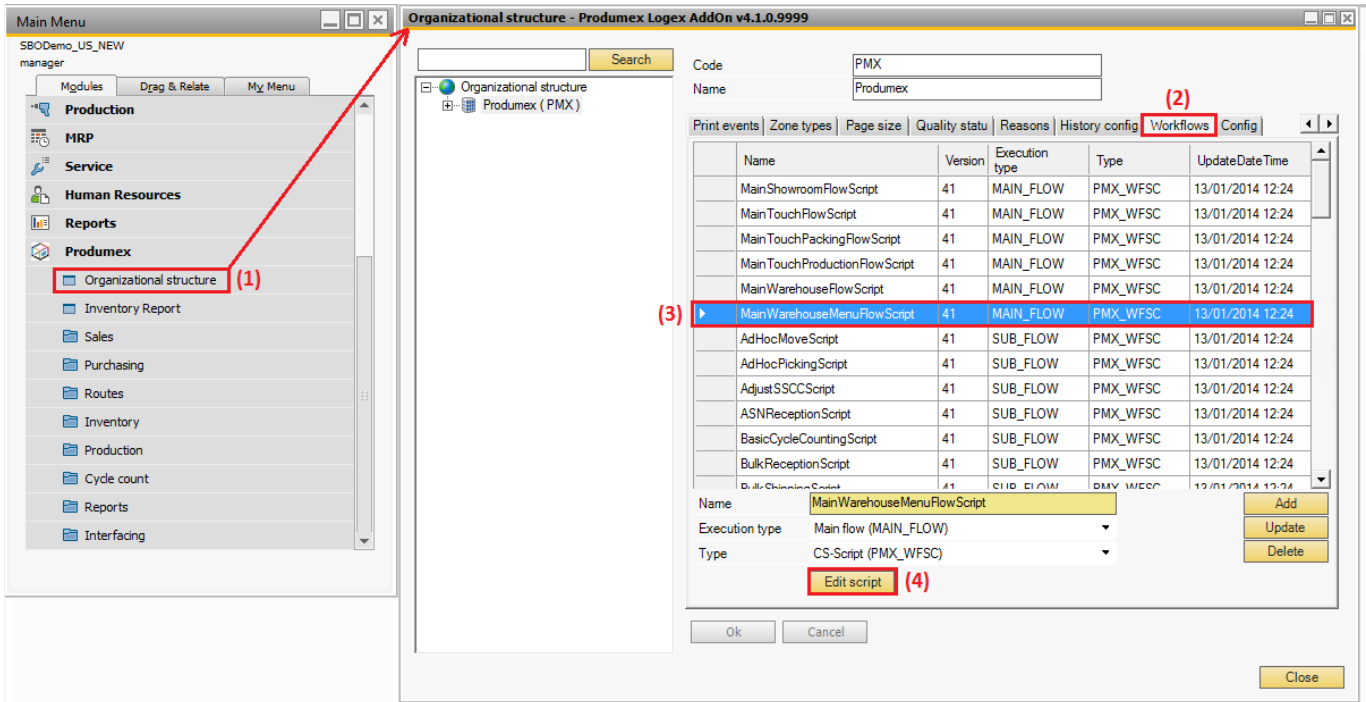


5.1.13.1. Edit workflowscripts

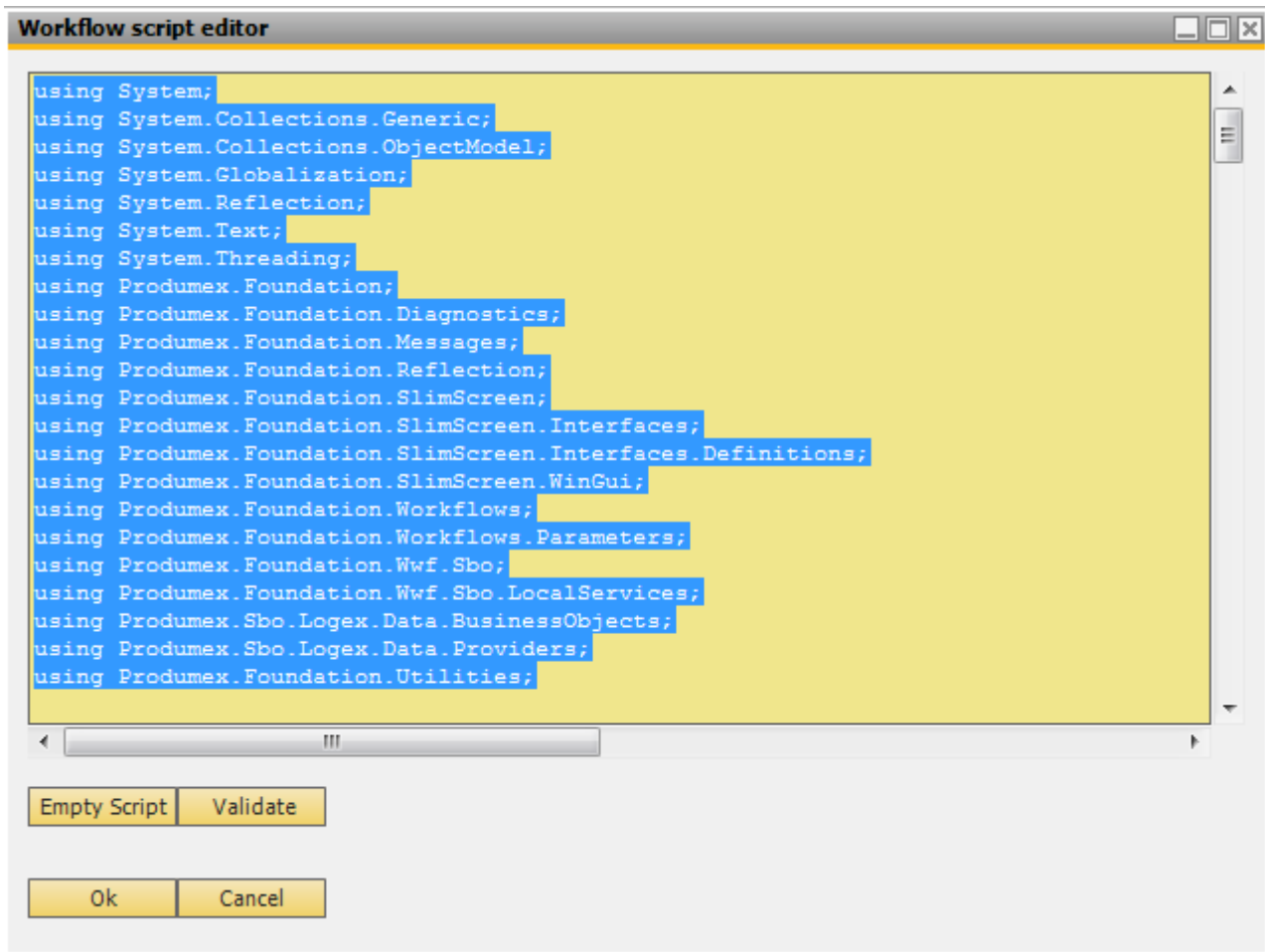
It is possible to adjust for instance main menu flows to remove buttons. Do not adjust the flows provided by Produmex, because they will be overwritten when an update of the database is done.

Instead a copy should be made:

Open the PDMX Organizational Structure (1) → go to 'Workflows' tab (2) → Select the flow you want to edit (3) en click 'Edit Script' (4)



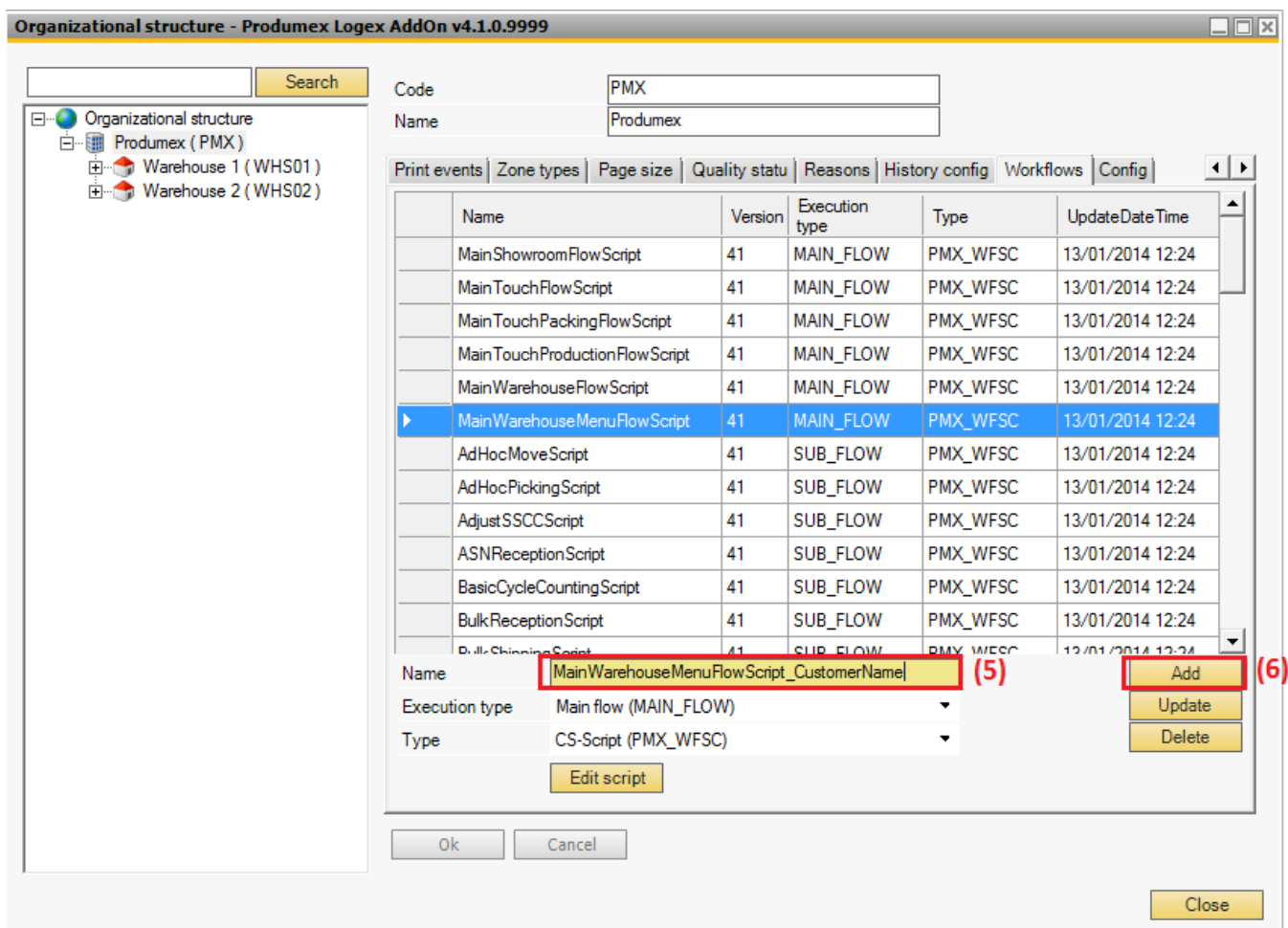
This opens the following screen:
Press CTRL + C to copy all the content to your clipboard



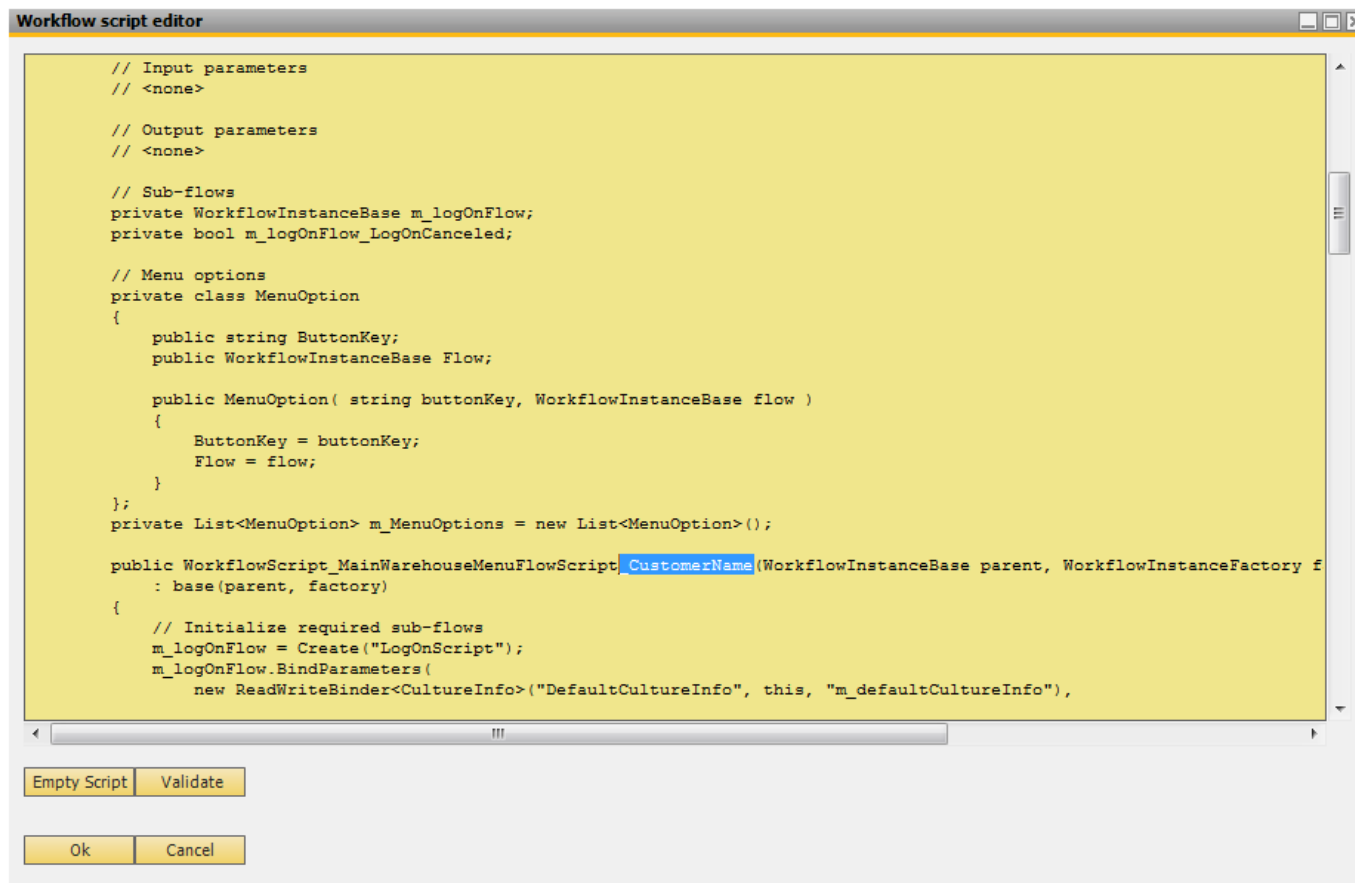
Then you can close this screen again.

Next, we will need to add a new script for the customer that we will edit later on.

On the Workflows tab → Select the script you want to edit again and modify the name below (5) → Then click on 'Add' (6)



This has added a line to you workflows (see (7)), now we must paste the content in this script. Select this newly added line and click on 'Edit script' (8) → Then paste (CTRL + V) the copied content in this new script:



Now we can really edit the available button in this script.

Therefore we have to scroll to the section with the button list.

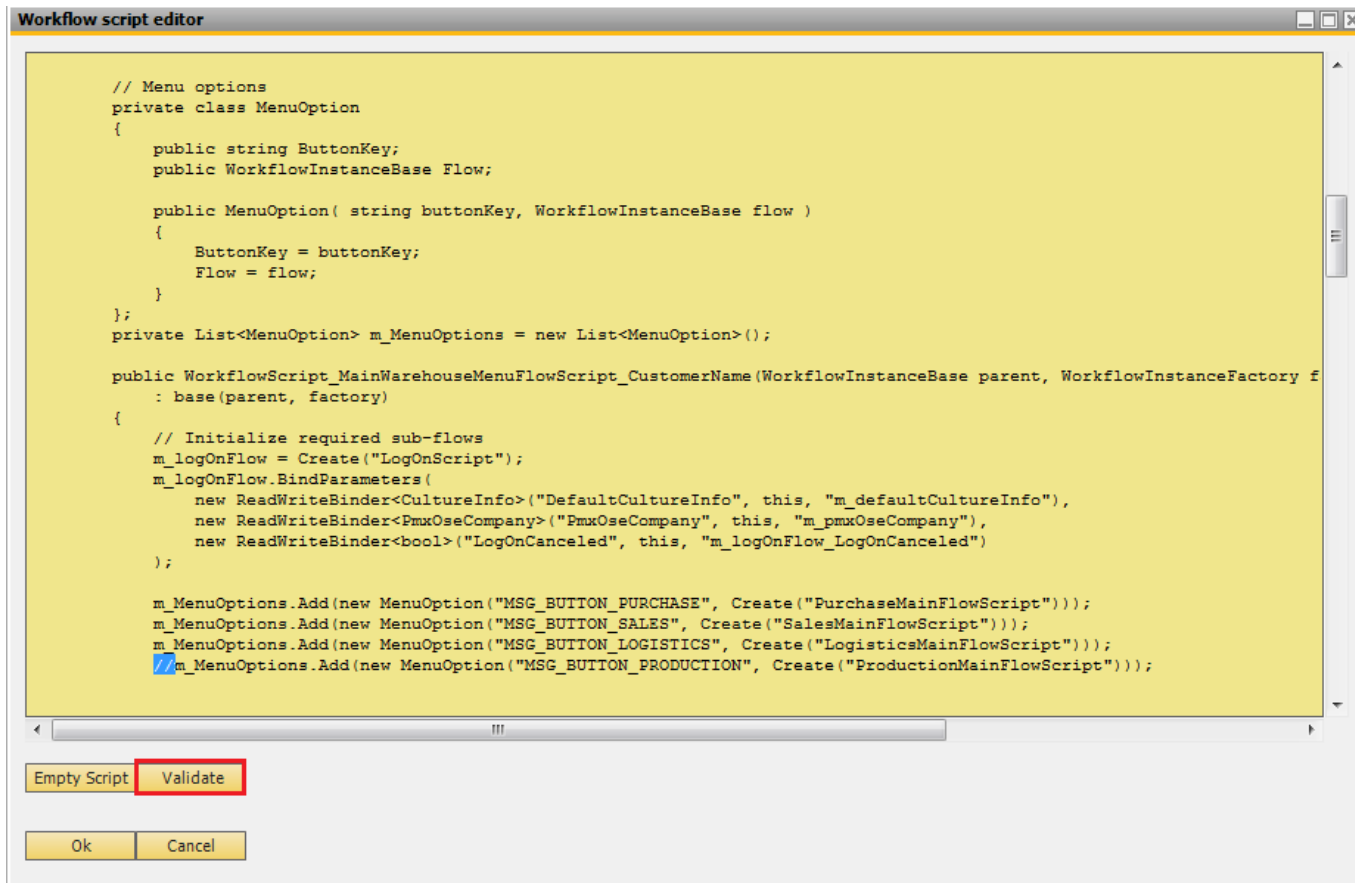
Here we can disable or enable button by placing them in or out comment.

(// in front of the code means it is in comment and will not be taken into account)

So I will delete the Production button from the main flow in this example.

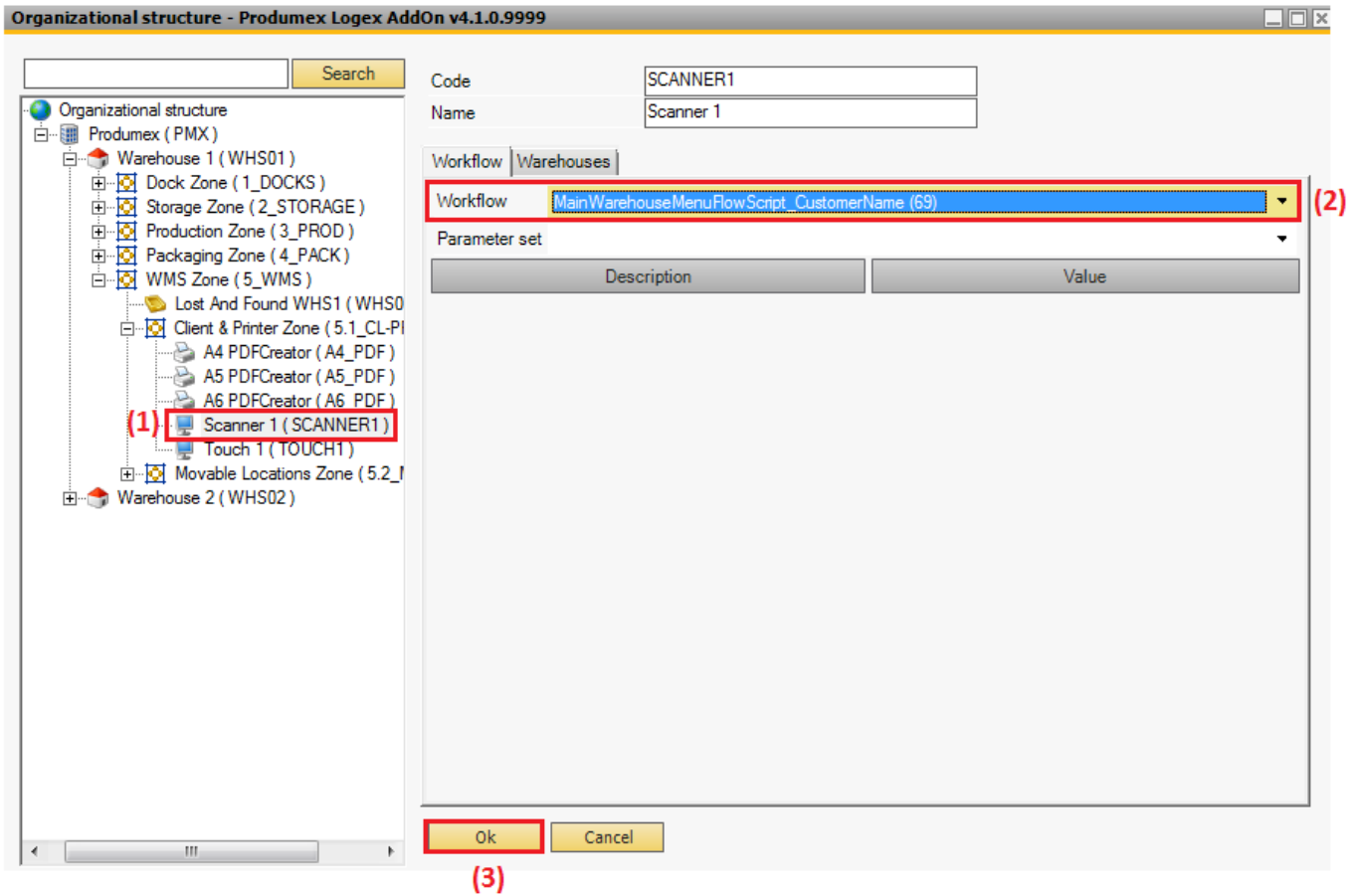
I look for the **code `m_MenuOptions.Add(new MenuOption("MSG_BUTTON_PRODUCTION", Create("ProductionMainFlowScript")));`**

Then I can disable this button by adding // in front of it:

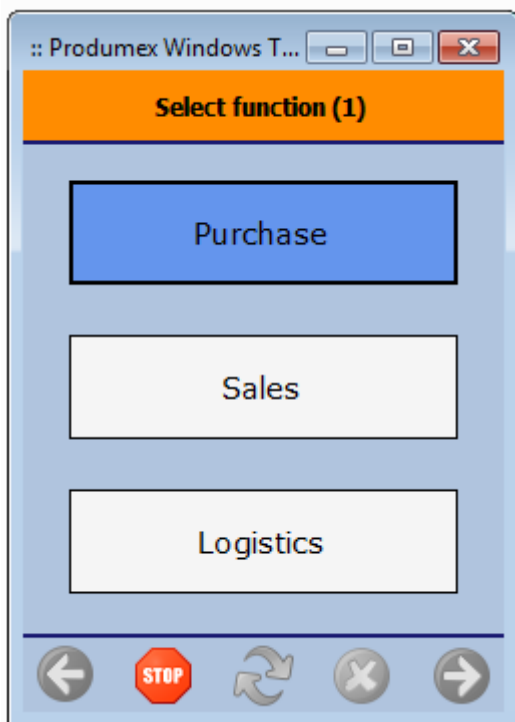


Then we can 'Validate' this script with the foreseen button.

Finally, we need to make sure this code is launched, so we will possibly need to modify the script that is used on the fat client: Select client in Org. Struc. (1) → Select new Workflow (2) → OK (3)



If we then startup this client, we can see that the production button is no longer present: (Only Purchase, Sales and Logistics)



5.1.14. Config

The config tab list some configuration that can be done for several processes. Also customer specific configuration can be stored here.

It will have settings for:

- Interfacinig
- WA interfacing
- Configuration for SBO notification listener actions
- ...

5.2. Other Organization Structure Settings

All OSE objects have a code and a description field.

Code

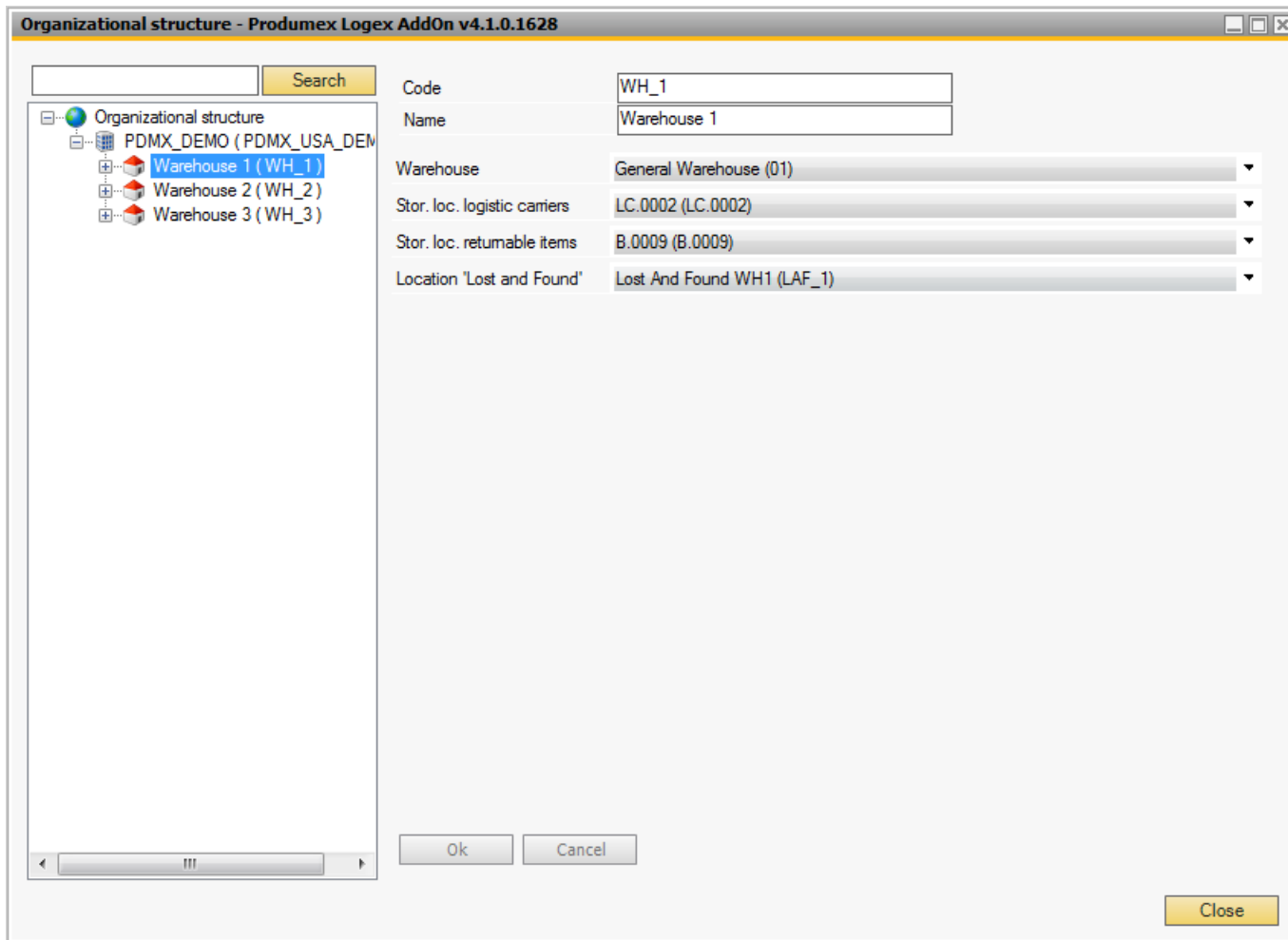
The code of the OSE object. This field cannot be updated.

Description

The description of the OSE object.

5.2.1. Warehouse settings

At the warehouse level the following settings can be defined:



Warehouse

This is the link between the warehouse defined in PDMX and the warehouse in SAP Business One (*Cfr. Administration → Setup → Inventory → Warehouses.*)

Each SAP warehouse can only be linked once in Produmex warehouses.

Stor. Loc. logistic carriers

The location in the warehouse where the logistic carriers are located (*in case you have indicated at the company level that logistic carriers have to be stored at one location per warehouse.*)

Stor. Loc. returnable items

The storage location for the returnable items. This is used when inventory returnable items are used.

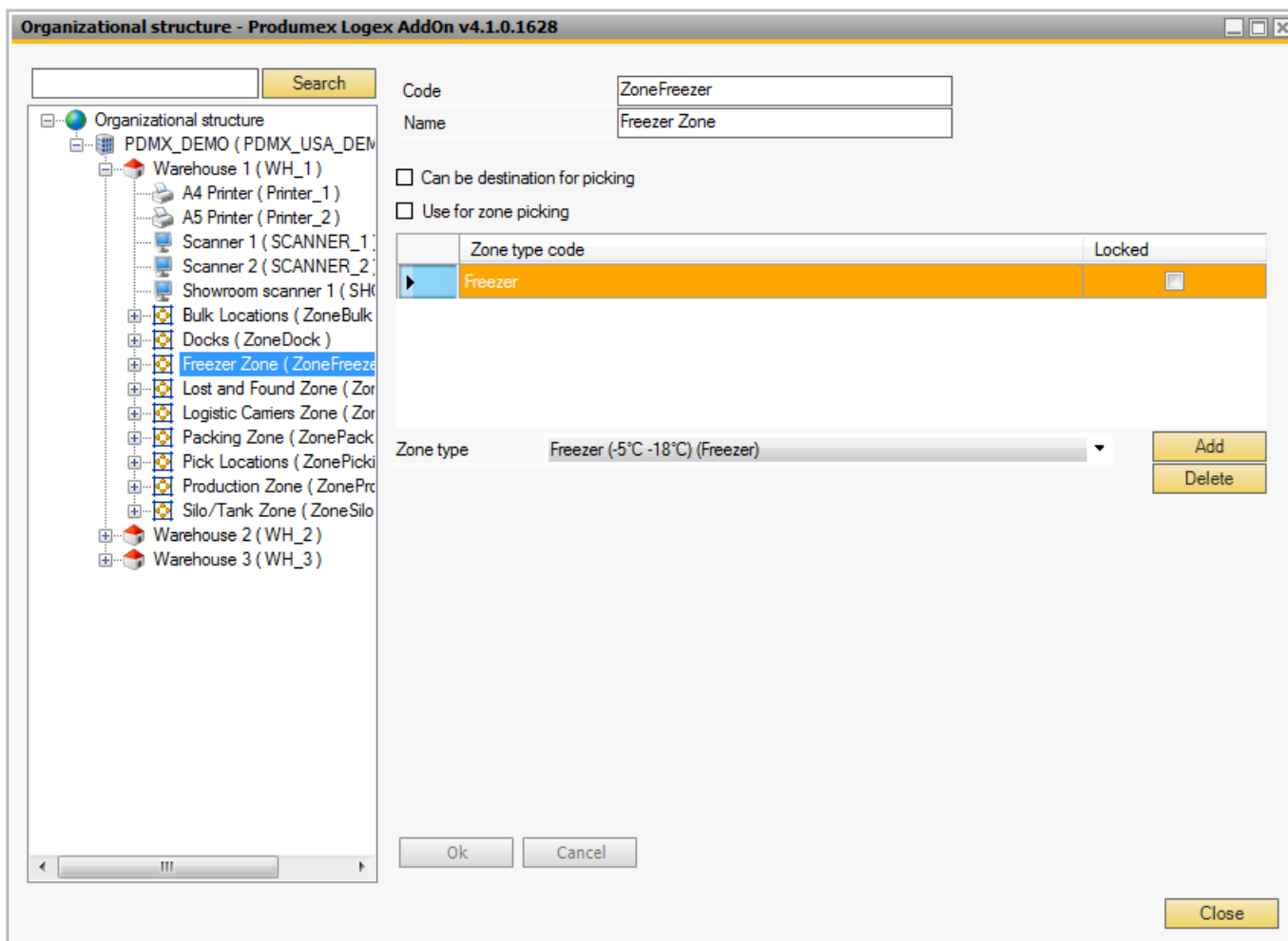
Location 'Lost and Found'

The 'Lost and Found' location for that warehouse. All item differences counted during cycle counting (*indirect cycle counting*) will be moved to the Lost and found location in case this is set up on the CycleCountController.

Stock on storage locations set for Lost and found, logistic carriers, ... are not taken in account to create pick list (proposals).

5.2.2. Zone settings

At the level of a zone, the following settings can be defined:



Use for zone picking

Can this zone be selected on the flow 'Zone picking'?

Zone type

Selection from a drop-down list. A zone can belong to one or more zone types: e.g. temperature-related and/or humidity-related. If the zone in question is a main zone (highest level) consisting of one or more sub-zones, the zone type that applies to the highest level zone also applies to the lower level ones too. In that case the "Locked" field is ticked.

5.2.3. Production line settings

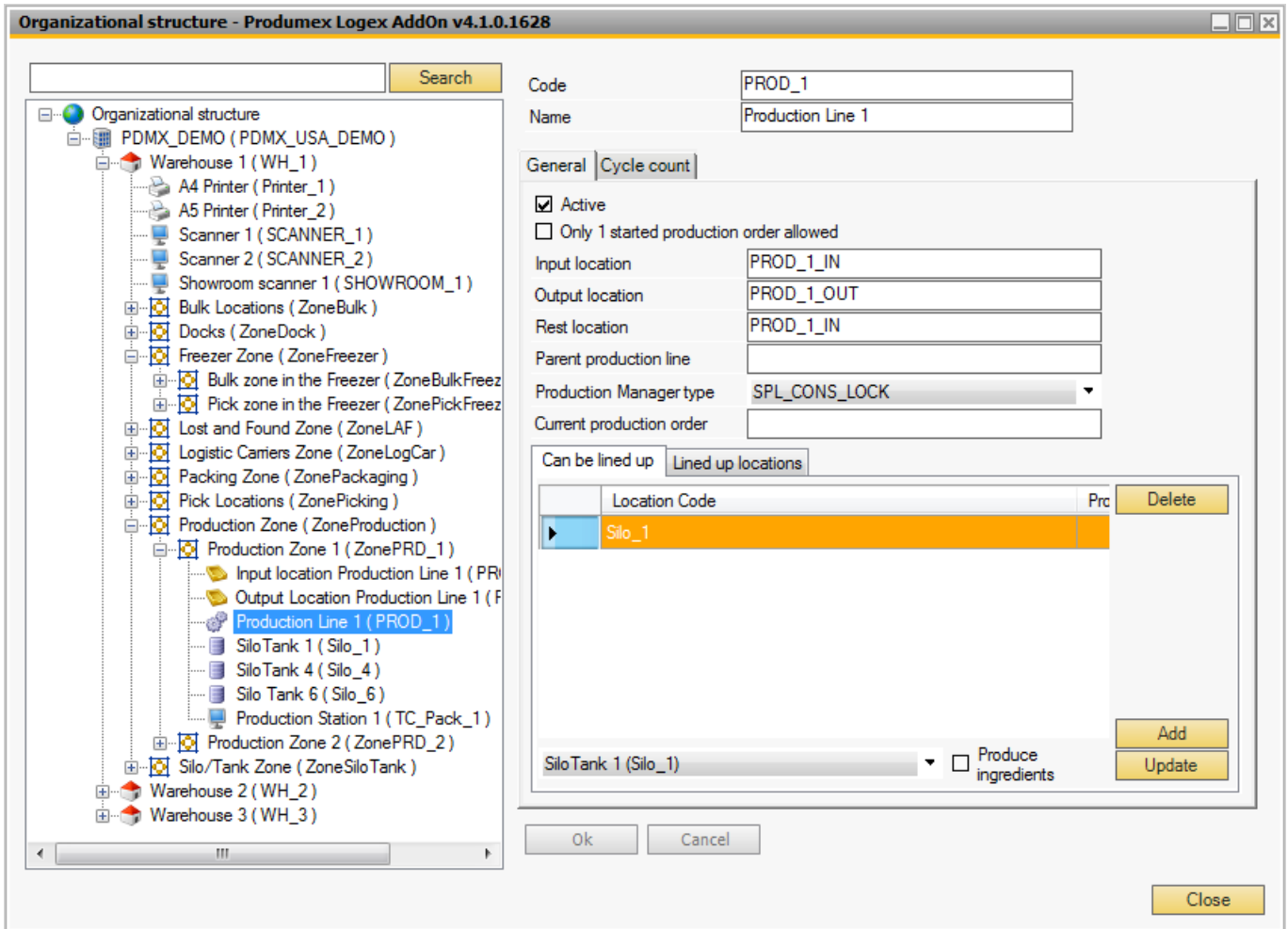
A production line in PDMX is always subordinate to a warehouse.

There are multiple ways of doing production:

- Production flow: This flow handles the receipt AND issue for production in the client
- Production manager + Production receipt: On the scanner/touchscreen the receipt for production is booked. The production manager handles the starting + stopping of the production order.

Do not use the same production line for both flows

The following settings can be defined for a production line:



Active

Set whether or not the production line is active. A production line can only be active when an Input, Output and Rest location is filled in.

Only 1 started production order allowed

If set, only 1 started production order is allowed for this production line. This can only be used in combination with the production manager and 'Production receipt' flow.

The 'Production' flow always forces to only have 1 production order started on the production line.

Pick to location

The location where the needed ingredients are picked to. When this is not filled in, the system will use the 'Input' location. The ComponentWeighingFlow will use the 'Pick to' location as input for the items to be weighed. The weighed items will be stored on the 'Input' location. Stock on a 'Pick to' location is not taken in account to create pick list (proposals).

Input location

The location where the needed ingredients are picked to. Production flows will move stock from the input location to the production line. Stock on an input location is not taken in account to create pick list (proposals).

Output location

The location where the finished products will be stored.

Rest location

Location to which the rest of used materials and ingredients are moved. It is possible to use the input location as rest location. In this case the remaining items will be ready to use for the next production order.

Parent production line

The parent production line is used if for instance the production is done in several steps. In this case the user can define the sequence of the production lines.

Production manager type

This is used when the processing of the production issues is done administratively. This can have 2 possible values.

- SPL_CONS_LOCK: When producing on the shop floor, the items to consume are not directly consumed, but they are locked. When processing the production order administratively, the system will use the locked stock as base for the consumption.
- MPL_CONS_INPUT: When the users do not want to perform the tasks to move the correct stock to the production line when producing, this option is used. When processing the production order administratively, all stock on the input location is used as base for the consumption. Furthermore, all production orders on production lines with the same input location will be processed in 1 time.

Current production order

The current production order for this production line (*read-only*)

Can be lined up

Some locations can be lined up. If a location is added here, it means the stock in this location is used directly, and does not need to be picked. This is usually used for tanks and/or silo's.

However an output location of another production line can also be set as 'lined up'. Now the produced items on the 'previous' (*linked*) production order can directly be used instead of picking the items.

Stock on possible lined up location is not taken in account to create pick list (proposals).

Produce ingredients

This option is used if a linked production order needs to automatically produce stock.

The prerequisites for this to work correctly, is that the lined up location is used as an output location on another production line. At the time of production on the shopfloor, a started production order needs to be found on the production line with as output location the lined up location.

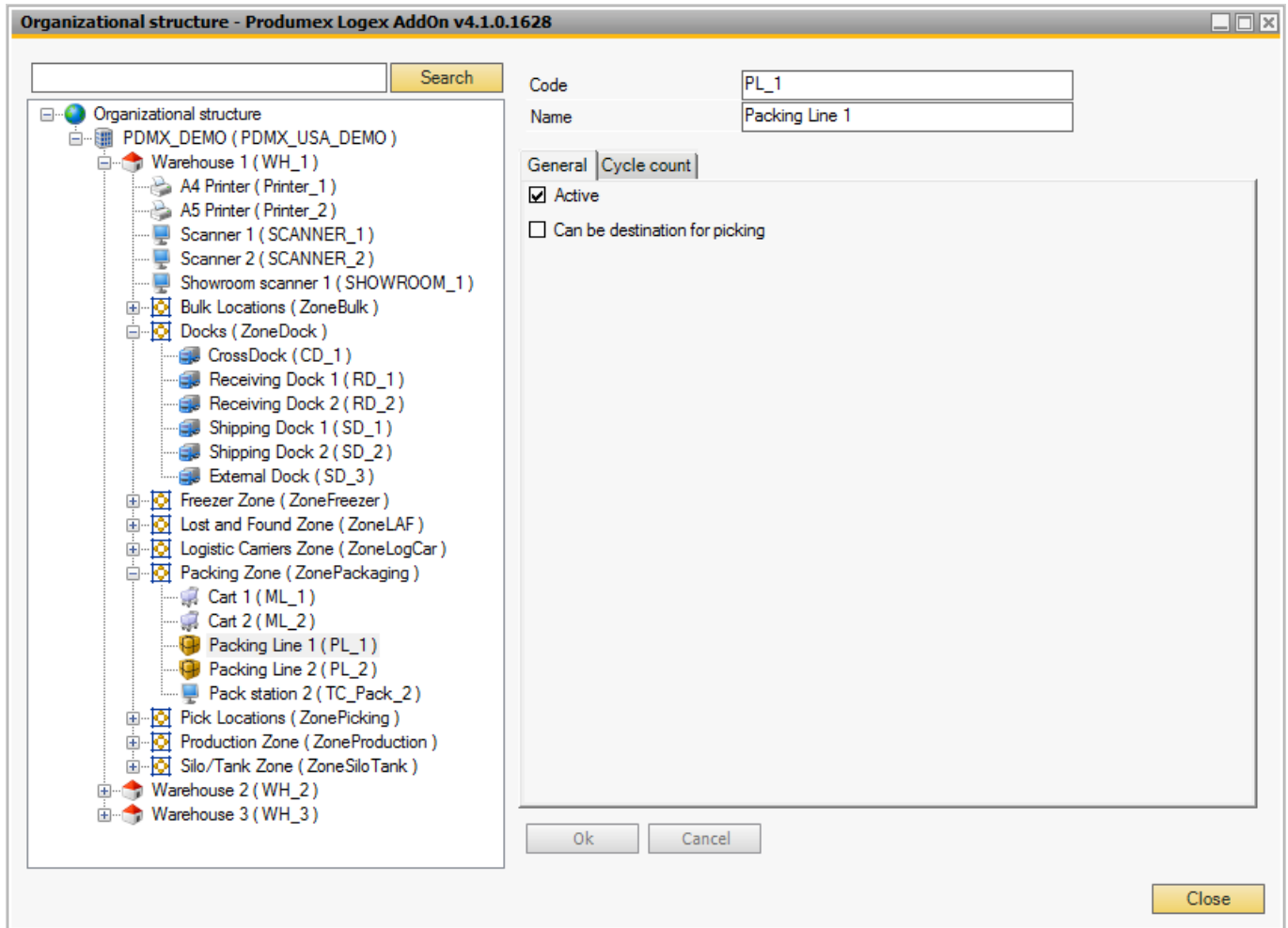
Lined up locations

The current lined up locations

5.2.4. Packing line settings

On a packing line, items that have been picked on a movable location (picking cart) can be packed onto a logistic carrier to be shipped as a logistic unit with an SSCC.

For a packing line the following settings can be made:



Active

Set whether or not the packing line is active.

Can be destination for picking

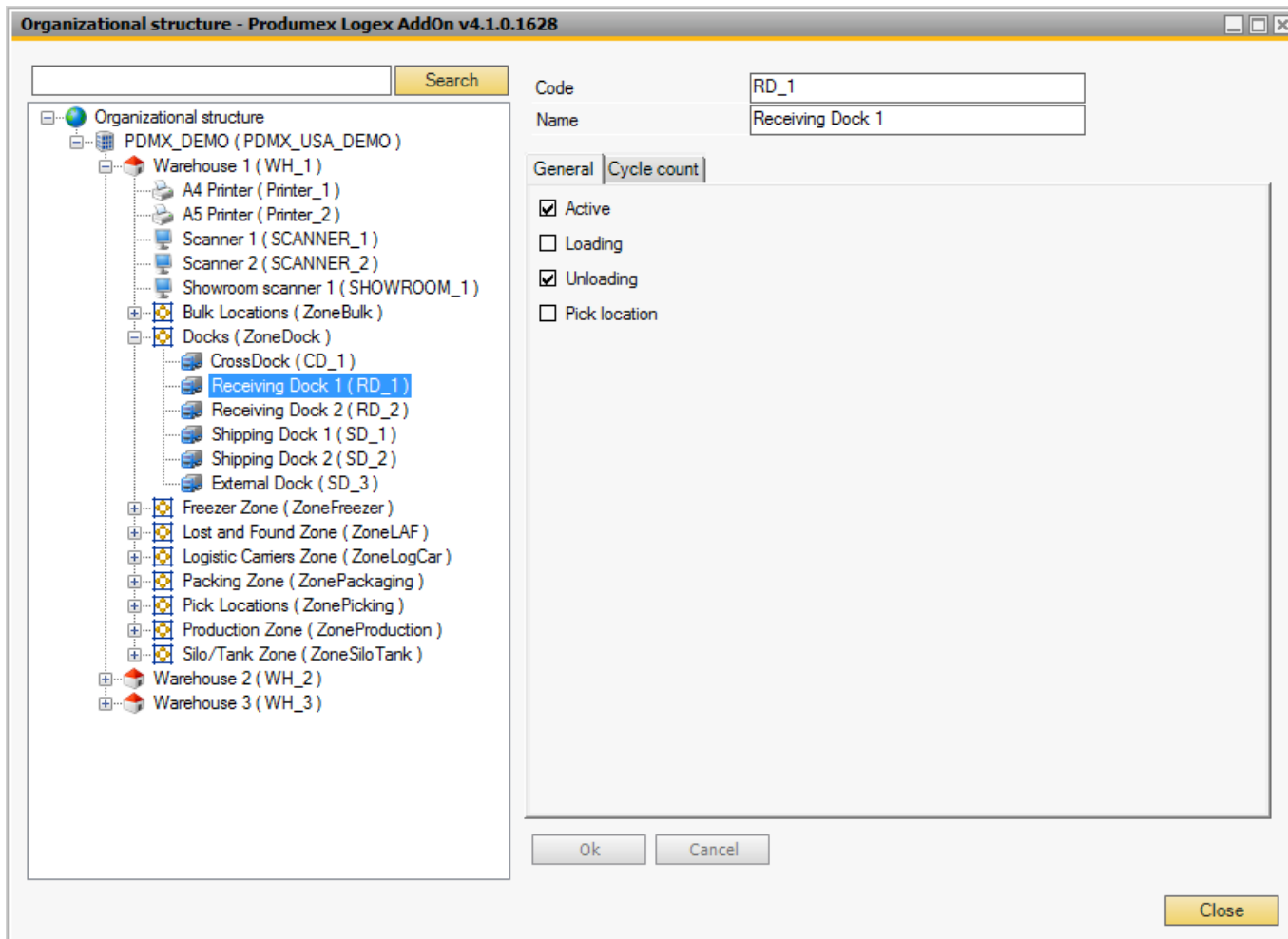
Set whether the packing line can be a destination for picking.

Block stock from being used on proposal

If this setting is enabled, the stock on this location cannot be used to put on a proposal. Also when a pick list gets the allocation on location level, these locations are not taken in account. The locations with this flag to true are added to the view PMX_DISALLOWED_LOCATIONS_FOR_PICKING

5.2.5. Dock settings

At the dock level the following settings can be made:



Active

Set whether or not the dock is active.

Loading & unloading

Whether the dock can be used for loading, unloading or both.

Pick location

Set whether a dock can also be a pick location (e.g. whether or not newly received goods that are still on the receiving dock can already be considered for picking)

Block stock from being used on proposal

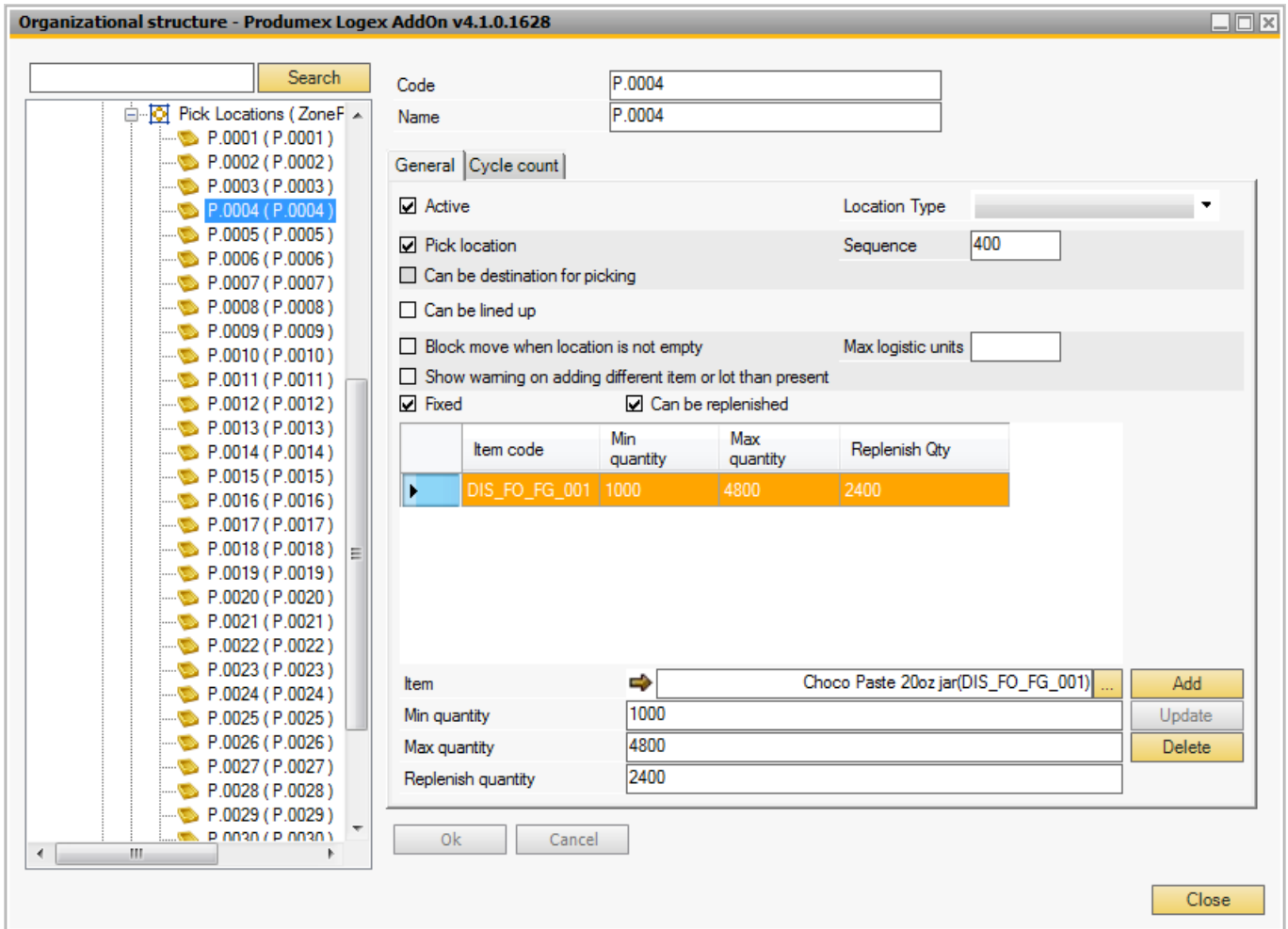
If this setting is enabled, the stock on this location cannot be used to put on a proposal. Also when a pick list gets the allocation on location level, these locations are not taken in account. The locations with this flag to true are added to the view PMX_DISALLOWED_LOCATIONS_FOR_PICKING

Sequence

The order in which the products at this location will be used to compose a picking order. The pick locations with the lowest sequence number will be used first to complete the pick order.

5.2.6. Bin settings

At the bin level (storage location) the general and cycle count settings can be defined:



Active

Set whether or not the bin is active.

Location type

The user can define a location type (UDT) and link it with a bin location. This information has further no technical use. It's for information purposes only.

Pick location

Set whether or not the bin is a pick location: if this is not the case the items that are stored at this location cannot be used for composing a shipment (order picking). A bin that is not used for picking (=bulk location) can be used to store safety stock that is used to replenish various pick locations.

Can be destination for picking

Set whether the bin can be a destination for picking. This means on the pick list it will be possible to select this location as 'dock'.

Sequence

The order in which the products at this location will be used to compose a picking order. The pick locations with the lowest sequence number will be used first to complete the pick order.

Block stock from being used on proposal

If this setting is enabled, the stock on this location cannot be used to put on a proposal. Also when a pick list gets the allocation on location level, these locations are not taken in account.

The locations with this flag to true are added to the view PMX_DISALLOWED_LOCATIONS_FOR_PICKING

Can be lined up

Set whether or not the bin can be lined up.

Direct consumption of goods (Production manager):

If the option 'Can be lined up' is set to true, this option is visible. By default the lined up locations are not directly consumed when using the production manager (*ProductionReceipt flow*). The stock is locked for the production order, and it is consumed when stopping the production order using the production manager. If this option is set to true, the goods that are lined up on this location, will be automatically consumed on the receipt from production.

Block move when location is not empty.

If set, a move to this location when is not empty is not allowed.

Show warning on adding different item or lot then present

This option will display a warning message when a different item or a different lot number will be added to that location. This warning is only when using the RF terminals.

Max logistic units

The maximum number of allowed logistic units (SSCC's).

If stock is not on an SSCC, the system will regard all this stock as 1 logistic unit.

This will not block a move, but is used when proposing locations on the devices.

Quality status

This option will force a certain quality status on this location. A check will be done when adding/moving stock to this location, that it has the quality status of the location when a quality status is set.

When booking a move through a device, or inventory report, the system will automatically set the quality status of the location when this is set.

When performing a direct cycle count on a location with a quality status, newly created stock will also get this quality status.

Other processes will NOT automatically get the quality status linked to the location.

Fixed

Indicates that the storage location is used for specific products. In this case a minimum, maximum quantity is defined for the item on that location.

When a location is fixed, the system will block local moves for other products into that location.

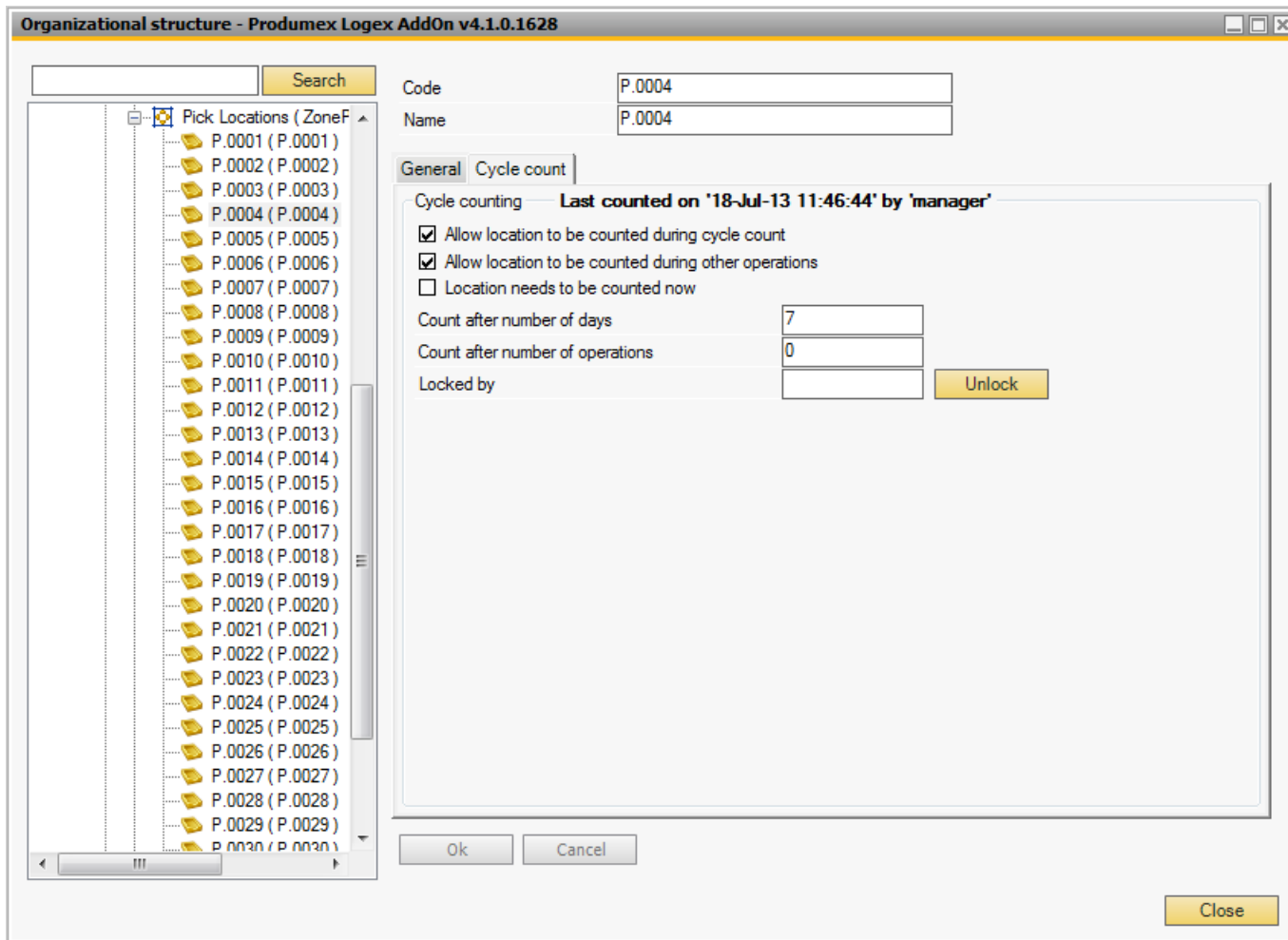
Can be replenished

Enables this option if the bin location can be taken in account for replenishment orders.

A minimum, maximum and replenish quantity needs to be set.

This can only be set when the location is a pick location.

5.2.7. Cycle count settings



Allow location to be counted during cycle count

Is the location allowed to be counted?

Allow location to be counted during other operations

Is the location allowed to be counted during other operations? This means that when this location is used on certain flows, the system will check if a count is needed. If so, the system will ask the user to perform a count.

Locations needs to be counted now

When this option is enabled, the location will be counted, regardless of the other settings (Number of days, number of operations, ...)

Count after X days

When a location has not been counted for the number of days defined here, the location needs to be counted. If the number is 0, this setting is not taken in account, and the setting on company level is taken.

Count after X operations

If the number of operations since the last count exceeds the defined number of operations, the location needs to be counted. If the number is 0, this setting is not taken in account and the setting on company level is taken.

Locked by (read-only field)

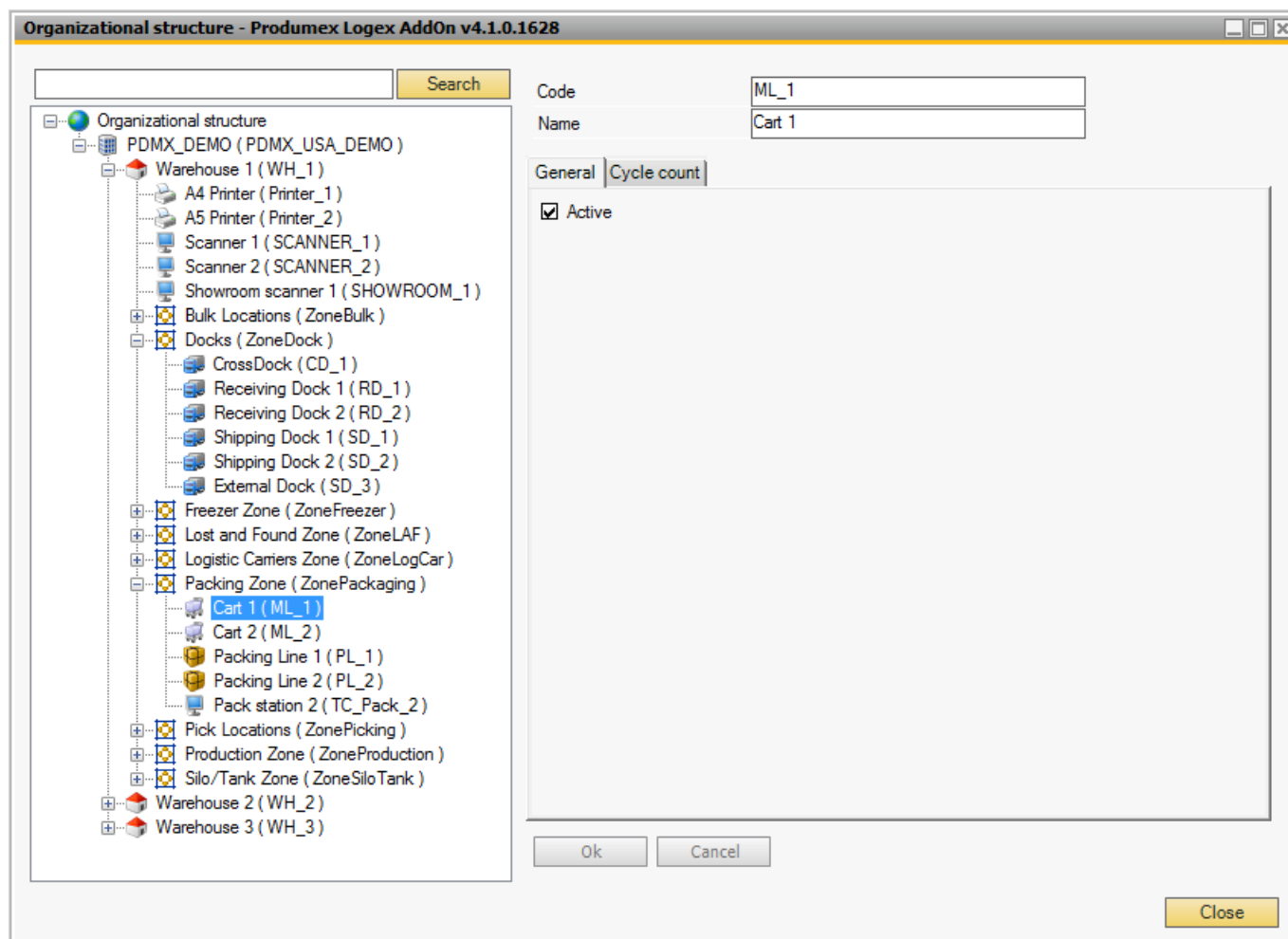
This field shows the key of the user that is locking the location, because he needs to count the location or is currently in process to count the location.

When a location is locked, it cannot be used in other processes.
The location is released by clicking the 'unlock' button.
Stock on locked locations is not taken in account to create pick list (proposals).

5.2.8. Moveable location settings

A moveable location is an intermediate storage location: this can be a cart, a movable rack, etc. A moveable location allows the operator to pick one or more orders and pack them onto a logistic carrier at another location (packing station).
In the organization structure it is possible to set the code and name of a moveable location and define whether or not it is active.
A moveable location can also be used in the cycle counting and has the same settings as a bin location.

Stock on movable locations is not taken in account to create pick list (proposals).



5.2.9. Silo/Tank settings

At the level of silo or tank the following settings can be defined:

Active

Set whether or not it is active.

Can be lined up

Set whether or not it can be lined up for production.

Direct consumption of goods (Production manager):

If the option 'Can be lined up' is set to true, this option is visible. By default the lined up locations are not directly consumed when using the production manager (*ProductionReceipt flow*). The stock is locked for the production order, and it is consumed when stopping the production order using the production manager. If this option is set to true, the goods that are lined up on this location, will be automatically consumed on the receipt from production.

Sequence

The order in which the products at this location will be used to compose a picking order. The pick locations with the lowest sequence number will be used first to complete the pick order.

Max quantity

The maximum quantity. This is for informational purposes. This will not block a move when quantity will be exceeded.

Pick location

Set whether or not it can be used as a pick location

Block stock from being used on proposal

If this setting is enabled, the stock on this location cannot be used to put on a proposal. Also when a pick list gets the allocation on location level, these locations are not taken in account. The locations with this flag to true are added to the view `PMX_DISALLOWED_LOCATIONS_FOR_PICKING`

Fixed

Set whether the silo/tank is reserved for a specific product and if so which are the minimum and maximum quantities.

Consumption algorithm

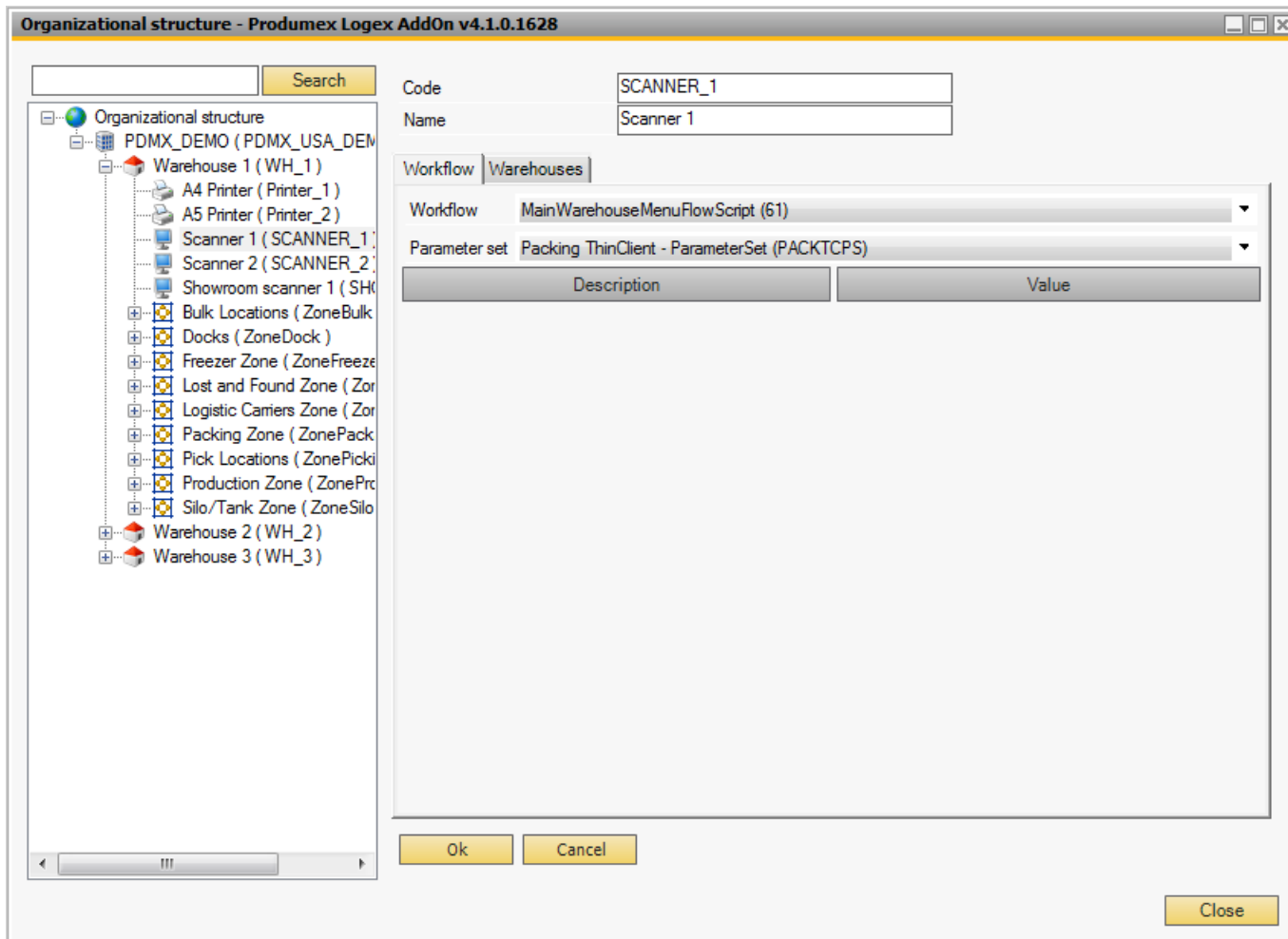
The consumption algorithm by which the contents of the silo/tank is consumed: differs for fluids or solids (second tab)

- FEFO: First to expire, first out
- Silo: Bottom layer (FIFO)
- Tank: Multi-layer (Consume a part from each batch)

5.2.10. Thin client settings

A thin client is a fixed or mobile operator station (touchscreen, handheld terminal, ...), by which the operator can interact and communicate with PDMX.

At the thin client level the following settings can be made:



Workflow

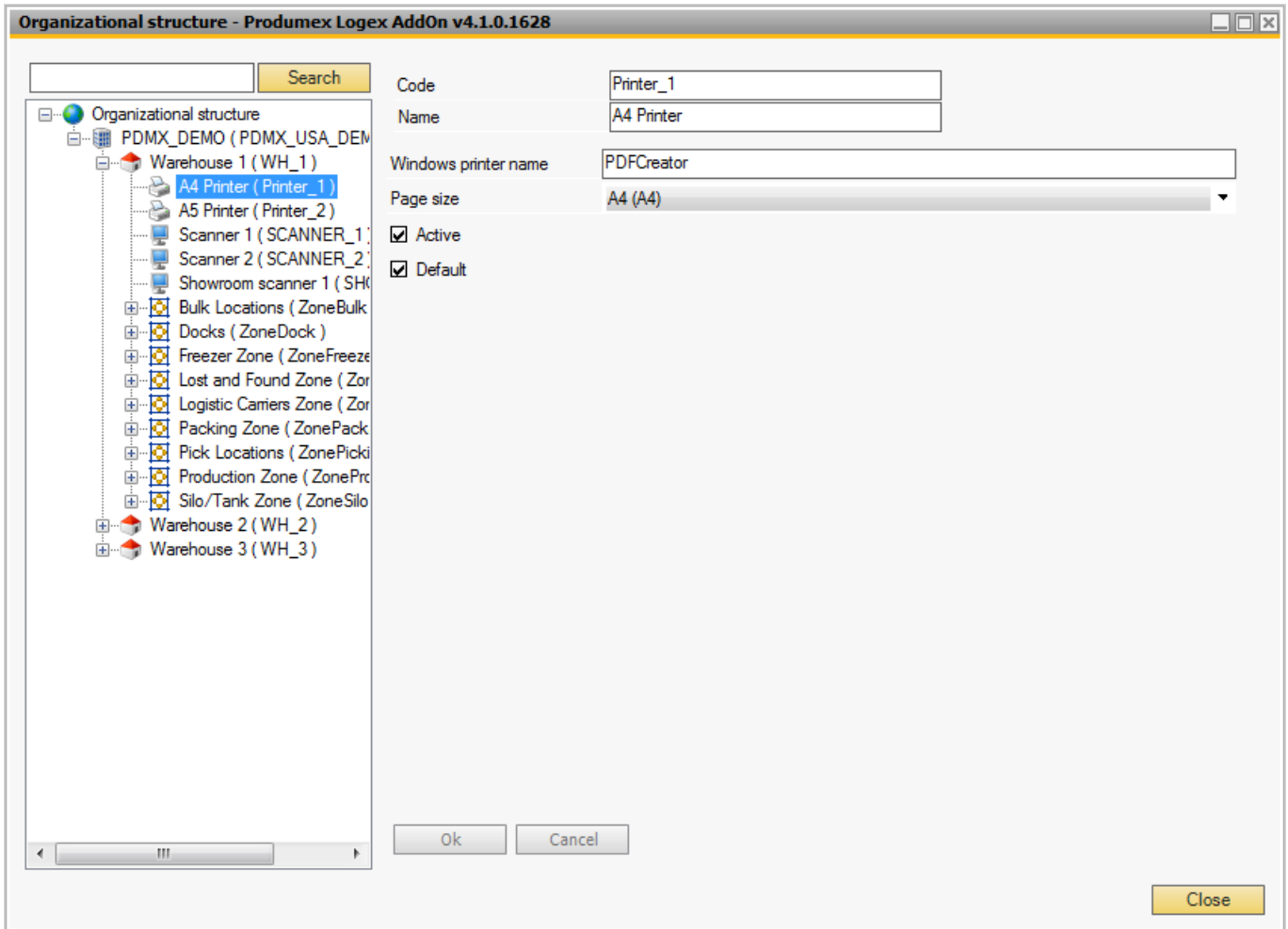
Next you can also assign a thin client to a “workflow”. A workflow is a sequence of actions to execute a certain operation, e.g. Reception, Picking, Production, Shipping, ...

Parameter set

For certain flows extra parameters can be set. When selecting a parameter set, the options to enter are available below.

5.2.11. Printer settings

For printers the following settings can be made:



Windows printer name

The printer name by which the printer is referred to in Windows

Page size

The default page size for the printer

Active

Set whether or not the printer is active.

Default

Set whether it is the default printer

5.2.11.1. Printer search path

These printers are used in flows on the devices.

The system will get the printer with the same page size as the report that needs to be printed.

First the system looks for printers below the device (In the organizational structure). Next the system will look if it can find a printer in higher levels, starting from the device.

If the system still does not find a printer, the system will check for printers starting from a location. Which location is taken will depend on the flow where the report will be printed.

Example: For a reception, the location will be the receiving dock.

The same search pattern as for the device is used. So first look for a printer below the location, next on higher levels.

When the system finds several printers on the same level, and there is 1 printer defined as default, it will take that printer. Otherwise the system will take the first printer it finds on that level.

Remark: When the system searches for printers on higher levels, it will not go back to a lower level to search for a printer.

6. Tools

6.1. Import Tool

6.1.1. Item - Batch Attributes

The import file structure is a CSV file.
An example can be found on the installation ZIP file.

The header line should be:
ItemCode;BatchAttributeCode;ValueEntryOption

Item code

The item code.

BatchAttributeCode

The batch attribute code.
This code should exist in the UDT @PMX_BATT (See page 45)

ValueEntryOption

This will set the way the data can be entered.
More explanation can be found at the item master data explanation. (See page 22)
Possible values:

- REQUIRED
- OPTIONAL
- HIDDEN

IsLinkedToBatch

Is the batch attribute linked to a batch? \ Possible values:

- Y
- N

6. Best practices

6.1. Custom reports

When creating custom reports, based on a default report, it is best to rename the reports, to avoid it to be overwritten after an upgrade.

When the default stored procedure provided by Produmex needs to be extended, it is also best to rename the stored procedure. Otherwise the changes will be overwritten after upgrading, or running the update database tool.

6.2. Cached data

Some master data is cached by Produmex. This is done to avoid to query this information each time this is needed, thus improving the performance.

So when making changes to item master data, organizational structure, ... the add-on and device applications should be restarted.

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