SFDC for SAP Business One User manual

April 2019

Shop Floor Data Collection

for

SAP Business One

SAP® Certified

SAP Business One Integration

SAP® Certified

Integration with Applications on SAP HANA®

Contents

Overview

This document provides the overview for SFDC for SAP Business One (Shop Floor Data Collection). It includes both explanatory and technical details documenting the solution. Full description of compatible hardware is listed along with the variations among these devices. SFDC for SAP Business One is offering to customers the capability to collect shop floor data via RF (radio frequency) devices, as well as hardwired terminals supporting protocols such as RS-232, RS-422, RS-485 and Ethernet, along with IOS and Android devices. In certain instances, a customer will want to have a hybrid environment that includes both RF and hardwired terminals.

The solution is a middleware service written to communicate with a variety of hardware devices via RF and hardwired and to also employ a flexible scripting component allowing powerful transaction support for easy modification and additions. Detailed in the manual are the specific transactions supported by the end devices.

SFDC for SAP Business One also supports printing; auto labeling solutions (such as label applicators), light trees, reader boards and PLC's. Please note: these "Non-RF" items listed in the previous sentence are not a standard part of SFDC for SAP Business One and therefore will be specified and provisions made for their inclusion during the functional specification phase of any custom project.

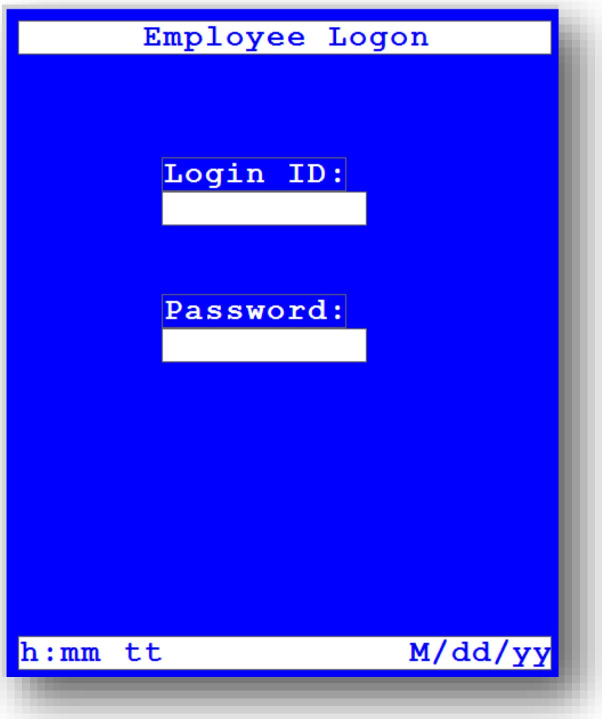
Please be aware that the transactions included in the documentation are the standard included items in the SFDC for SAP Business One System. As evidenced by the many types of devices supported above, other possibilities exist for interfacing to SAP Business One ERP and if requested, the product can be easily modified to support this.

SFDC for SAP Business One is, by design, very powerful, extremely flexible, and easy to use.

Interface Software

Employee Login Screen

Depending upon configuration and business needs security can be setup so that employees must log into the system using a specific user id and password. These user ids and passwords are configured in the Security Application discussed later in this document. If the configuration is set to use the SYS_LOGON screen, the user will see the following screen when they connect.

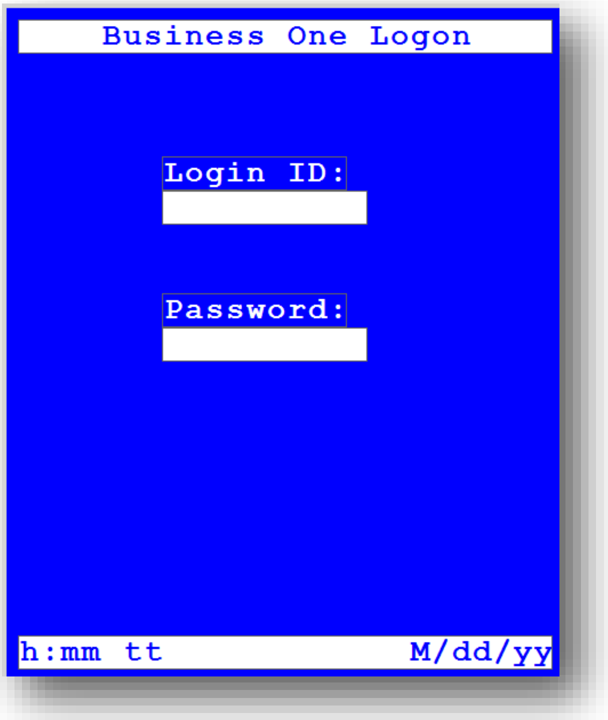


Login ID – Key or scan the ID of the user logging into the system. This value will be validated against the information setup in the Security configuration.

Password – Key or scan the password for the indicated user. If the password is incorrect the user will not be able to log into the system to access the various menus and screens of the SFDC system.

Business One Login Screen

Depending upon configuration and business needs security can be setup so that employees must log into the system using a specific user id and password validated against the Business One company. The user id must have an appropriate license setup to be able to perform SFDC transactions. If the Business One Login screen is configured for use, the user will see the following screen when they connect.



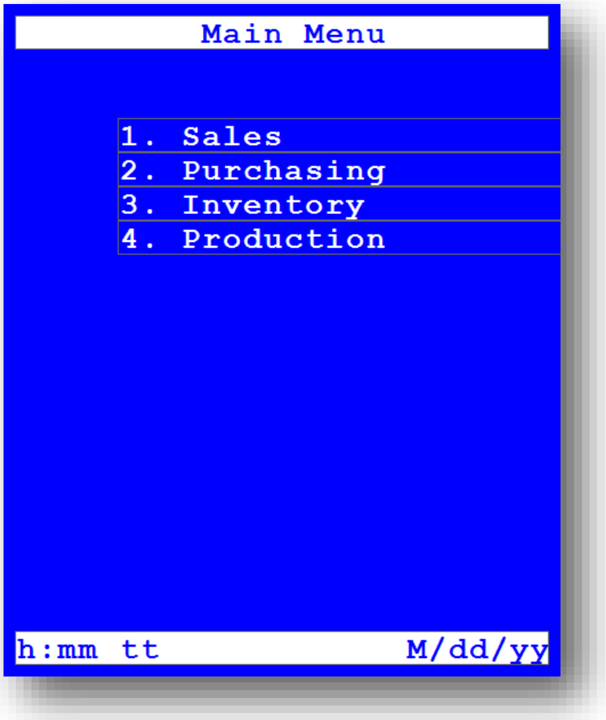
Login ID – Key or scan the ID of the user logging into the system. This value must be a valid SAP Business One user.

Password – Key or scan the password for the indicated user. Password will be validated for the give login ID. If the password is incorrect the user will not be able to log into the system to access the various menus and screens of the SFDC system.

Main Menu

The data collection terminal software consists of menu and screen prompts all designed to be easy to use on a small or large screen display. Each Device used within SFDC for SAP Business One has its own script instance that runs the application.

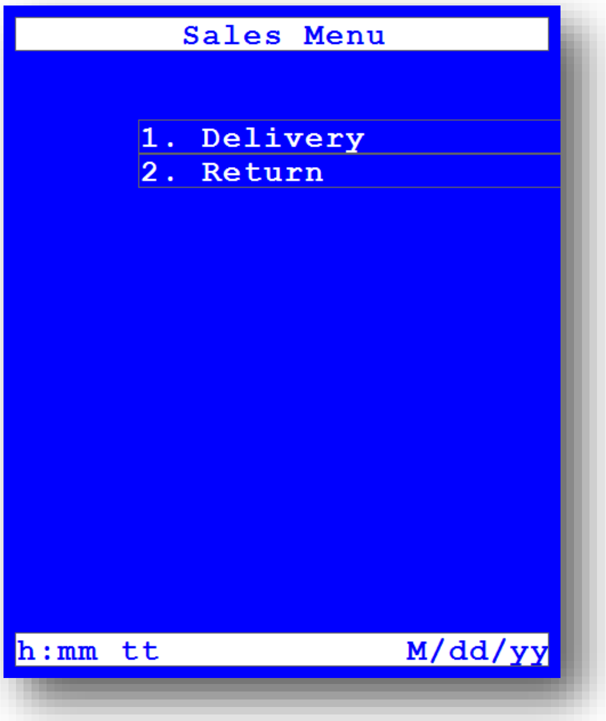
The Main Menu appears as follows:



Many menu options contains sub-menus. A sub-menu is a subsequent menu with more options. In the following pages we will detail all the menu options. The user has the choice of hitting the hot key (which is the number to the left of the menu) or scrolling down to the desired menu option and pressing enter. To exit a menu or screen press the (ESC) escape key.

Sales

Selecting the Sales option from the Main Menu will display the following screen:



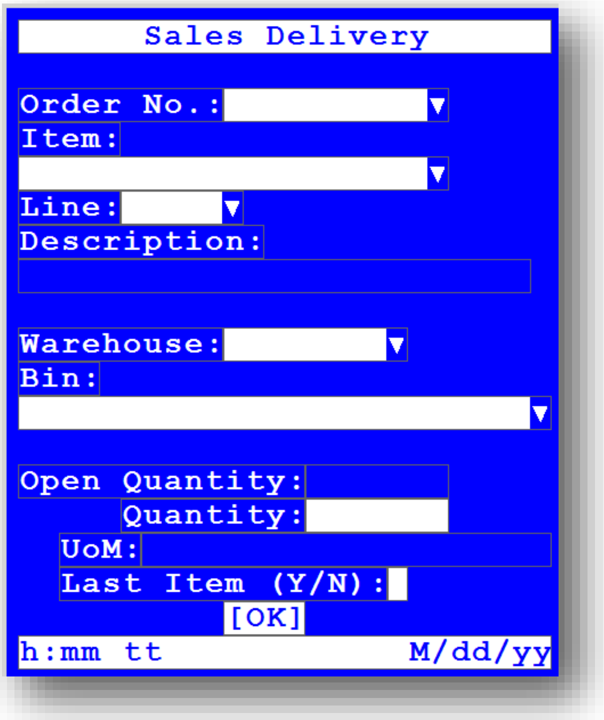
Below is a brief description of each of the Sales Menu options. The user has the choice of hitting the hot key (which is the number to the left of the menu) or scrolling down to the desired menu option and pressing enter. To exit a menu or screen press the (ESC) escape key.

1. ***Delivery***

2. ***Return***

Delivery

The Sales Delivery transaction is used to mark goods as being sold and delivered to customers. Selecting Delivery from the Sales Menu will display the following screen:



Order No – Key or scan the Order Number. Pressing the F2 key will display a list of all open orders along with the customer the order is for, order by required date.

Item – Key or scan the item that is being delivered. Pressing the F2 key will display a list of items for the sales order along with the line number and the quantity for the item/line.

Line – If an item is on multiple lines of the sales order, the user will key in or scan the line number for the item on the sales order. Pressing the F2 key will display all lines and quantities for the item entered.

Description – This will display the description of the item being delivered.

Warehouse – Key or scan the warehouse the item is being delivered from. Pressing the F2 key will display a list of all warehouses available for delivery.

Bin – Key or scan the bin the item is from. Pressing the F2 key will display a list of all bins for the selected warehouse available for delivery.

Open Quantity – This will display the current quantity open for delivery.

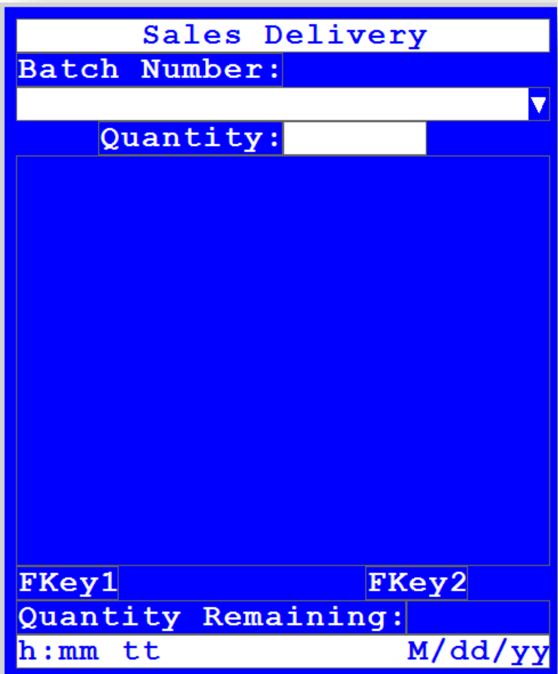
Quantity – Key or scan the quantity being delivered. If the item is batch or serial controlled, the user will be taken to the batch or serial collection screen.

UOM – Display only field of the Unit of Measure the item is being delivered in.

Last Item – If the item being delivered is the last item, user will key in Y, else, if more items are to be delivered, user will key in N.

OK – Hitting enter here will finish the transaction. If the user entered N for last item, they will be returned to the item prompt for delivery of the next item. If they entered a Y for last item, the transaction will complete and a sales delivery transaction will be posted to SAP B1 for the items scanned for the delivery.

If batch numbers are required



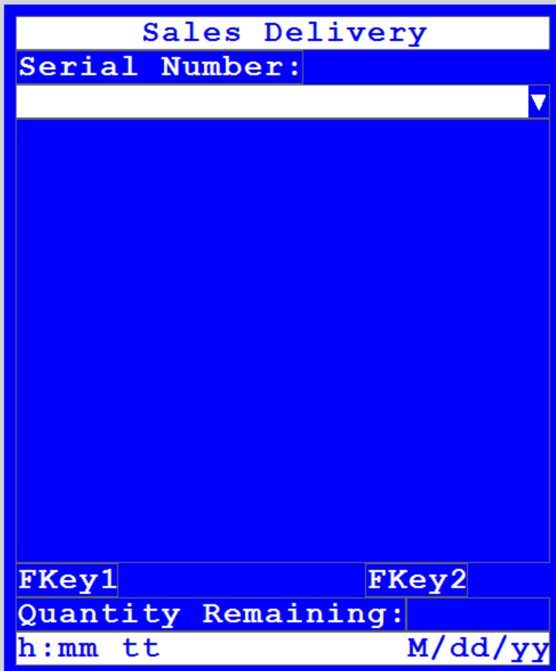
Batch Number – Key or scan the Batch Number. Pressing the F2 key will display a list of all batch numbers.

Quantity – Key or scan the batch quantity. If the quantity entered here equals the quantity entered on the first screen, the user will be returned to the last item prompt, else the user will be returned to the batch number field to enter another batch number and quantity, until enough batch quantity is entered for the item quantity.

Quantity Remaining – this will display the quantity that needs batch numbers provided.

FKey1 FKey2 – the user will be able to hit the function keys shown to edit the list of batch numbers scanned, and delete the batch number from the list if needed. Other function keys will be used for deletion and for completing.

If serial numbers are required



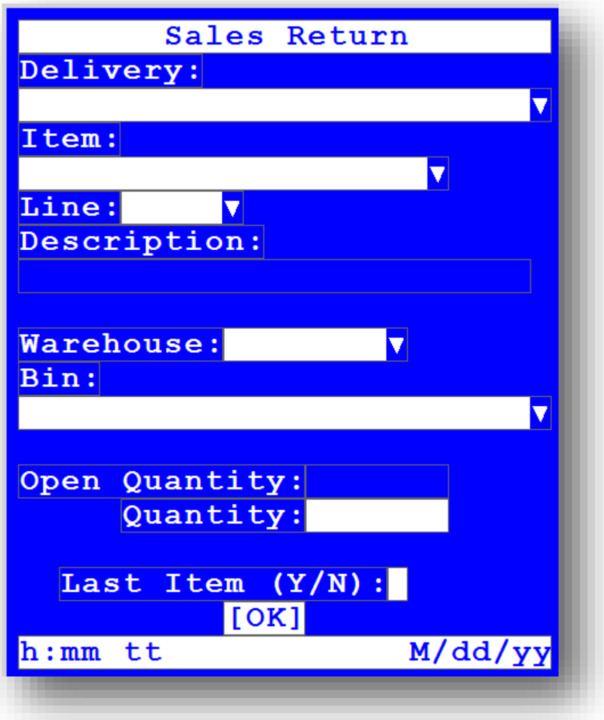
Serial Number – Key or scan the serial Number. Pressing the F2 key will display a list of all serial numbers. If the entered serial numbers equals the quantity entered on the first screen, the user will be returned to the last item prompt, else the user will be returned to the serial number field to enter another serial number, until enough serial numbers are entered for the item quantity.

Quantity Remaining – this will display the quantity that needs serial numbers provided.

FKey1 FKey2 – the user will be able to hit the function keys shown to edit the list of serial numbers scanned, and delete the serial number from the list if needed. Other function keys will be used for deletion and for completing.

Return

The Sales Return transaction is used to accept return of goods that were sold. Selecting Return from the Sales Menu will display the following screen:



Delivery – Key or scan the delivery number. Pressing the F2 key will display a list of all deliveries, along with the sales order and customer the delivery was for.

Item – Key or scan the item that is being returned. Pressing the F2 key will display a list of items for the delivery along with the line number and the open quantity.

Line – If an item is on multiple lines of the delivery, the user will key in or scan the line number for the item on the delivery. Pressing the F2 key will display all lines and quantities for the item entered.

Description – This will display the description of the item being returned.

Warehouse – Key or scan the warehouse the item is being returned to. Pressing the F2 key will display a list of all warehouses available for return.

Bin – Key or scan the bin the item is returned to. Pressing the F2 key will display a list of all bins for the selected warehouse available for return.

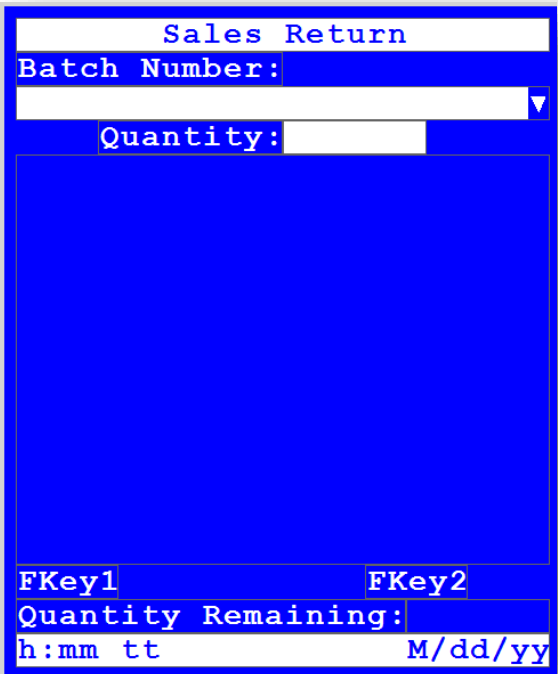
Open Quantity – This will display the current quantity open for return.

Quantity – Key or scan the quantity being returned. If the item is batch or serial controlled, the user will be taken to the batch or serial collection screen.

Last Item – If the item being returned is the last item, user will key in Y, else, if more items are to be returned, user will key in N.

OK – Hitting enter here will finish the transaction. If the user entered N for last item, they will be returned to the item prompt for return of the next item. If they entered a Y for last item, the transaction will complete and a sales return transaction will be posted to SAP B1 for the items scanned for the return.

If batch numbers are required



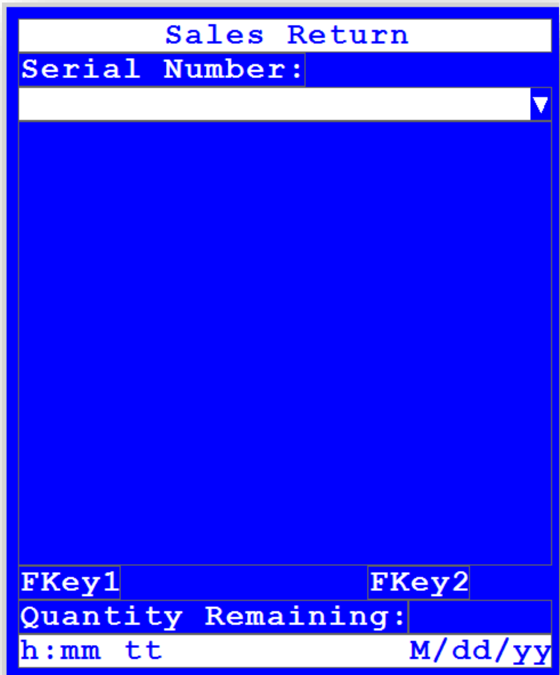
Batch Number – Key or scan the Batch Number. Pressing the F2 key will display a list of all batch numbers.

Quantity – Key or scan the batch quantity. If the quantity entered here equals the quantity entered on the first screen, the user will be returned to the last item prompt, else the user will be returned to the batch number field to enter another batch number and quantity, until enough batch quantity is entered for the item quantity.

Quantity Remaining – this will display the quantity that needs batch numbers provided.

FKey1 FKey2 – the user will be able to hit the function keys shown to edit the list of batch numbers scanned, and delete the batch number from the list if needed. Other function keys will be used for deletion and for completing.

If serial numbers are required



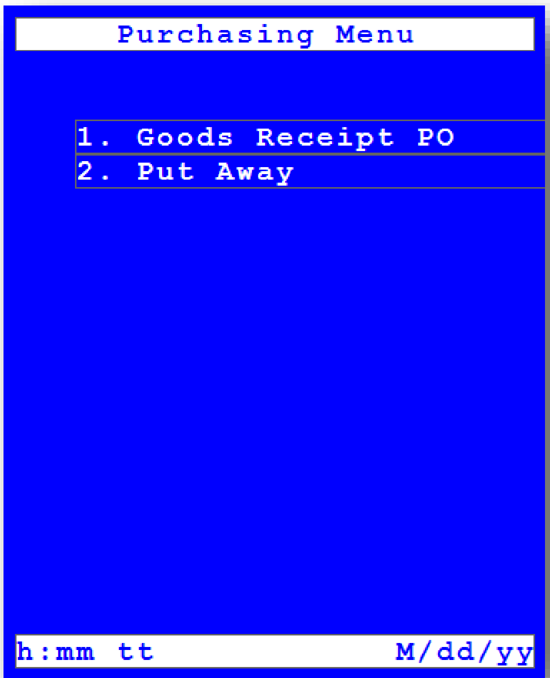
Serial Number – Key or scan the serial Number. Pressing the F2 key will display a list of all serial numbers. If the entered serial numbers equals the quantity entered on the first screen, the user will be returned to the last item prompt, else the user will be returned to the serial number field to enter another serial number, until enough serial numbers are entered for the item quantity.

Quantity Remaining – this will display the quantity that needs serial numbers provided.

FKey1 FKey2 – the user will be able to hit the function keys shown to edit the list of serial numbers scanned, and delete the serial number from the list if needed. Other function keys will be used for deletion and for completing.

Purchasing Menu

Selecting Purchasing from the Main Menu will display the following screen: :

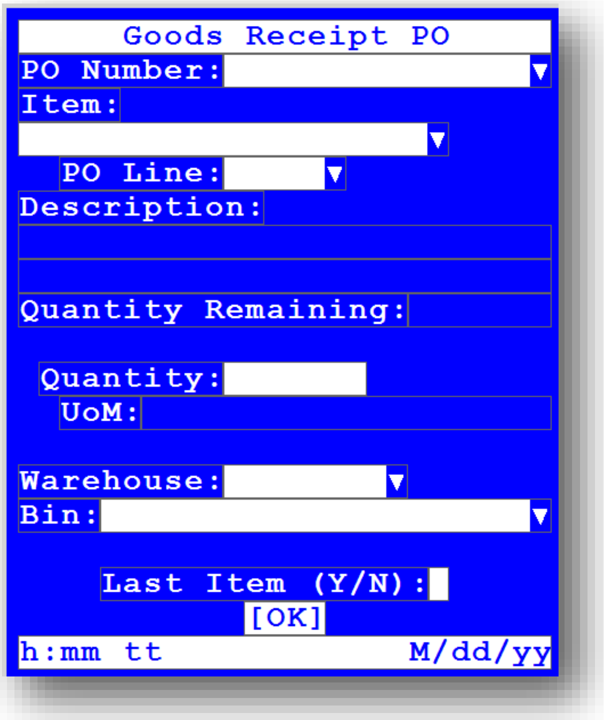


Below is a brief description of each of the Purchasing Menu options. The user has the choice of hitting the hot key (which is the number to the left of the menu) or scrolling down to the desired menu option and pressing enter. To exit a menu or screen press the (ESC) escape key.

1. ***Goods Receipt PO***
2. ***Put Away***

Goods Receipt PO

The Goods Receipt PO transaction is used to receive goods that were ordered via a purchase order. Selecting Goods Receipt PO from the Purchasing Menu will display the following screen:



PO Number – Key or scan the purchase order number. Pressing the F2 key will display a list of all open purchase orders, along with the sales order and customer the purchase order was for.

Item – Key or scan the item that is being returned. Pressing the F2 key will display a list of items for the purchase order. This field is not required, and if the user hits enter on the blank field, and go to the PO Line field.

PO Line – If an item is on multiple lines of the purchase order, or the user did not enter a part number, the user will key in or scan the line number for the item on the purchase order. Pressing the F2 key will display all lines for the item entered, or all lines on the purchase order if not item was entered.

Description – This will display the description of the item being received.

Quantity Remaining – This will display the current quantity remaining to be received.

Quantity – Key or scan the quantity being received. If the item is batch or serial controlled, the user will be taken to the batch or serial collection screen.

UOM – Display only field of the unit of measure that the item is being received in.

Warehouse – Key or scan the warehouse the item is being received to. Pressing the F2 key will display a list of all warehouses available for receipt.

Bin – Key or scan the bin the item is received to. Pressing the F2 key will display a list of all bins for the selected warehouse available for receipt.

Last Item – If the item being received is the last item, user will key in Y, else, if more items are to be received, user will key in N.

OK – Hitting enter here will finish the transaction. If the user entered N for last item, they will be returned to the item prompt for receipt of the next item. If they entered a Y for last item, the transaction will complete and a goods receipt PO transaction will be posted to SAP B1 for the items scanned for the receipt.

If batch numbers are required

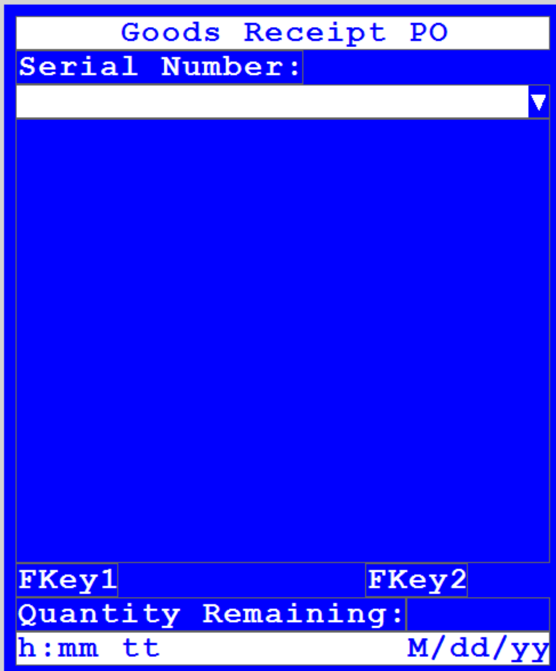
Batch Number – Key or scan the Batch Number. Pressing the F2 key will display a list of all batch numbers.

Quantity – Key or scan the batch quantity. If the quantity entered here equals the quantity entered on the first screen, the user will be returned to the warehouse prompt, else the user will be returned to the batch number field to enter another batch number and quantity, until enough batch quantity is entered for the item quantity.

Quantity Remaining – this will display the quantity that needs batch numbers provided.

FKey1 FKey2 – the user will be able to hit the function keys shown to edit the list of batch numbers scanned, and delete the batch number from the list if needed. Other function keys will be used for deletion and for completing.

If serial numbers are required



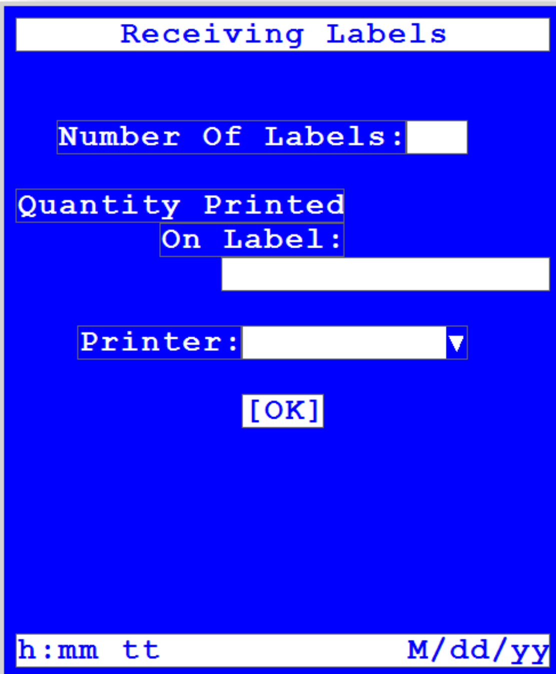
Serial Number – Key or scan the serial Number. Pressing the F2 key will display a list of all serial numbers. If the entered serial numbers equals the quantity entered on the first screen, the user will be returned to the warehouse prompt, else the user will be returned to the serial number field to enter another serial number, until enough serial numbers are entered for the item quantity.

Quantity Remaining – this will display the quantity that needs serial numbers provided.

FKey1 FKey2 – the user will be able to hit the function keys shown to edit the list of serial numbers scanned, and delete the serial number from the list if needed. Other function keys will be used for deletion and for completing.

Receiving Labels

If the Receiving Label property in the application configuration has a print file specified, after each batch number, serial number or item entered, the following screen will be displayed to print labels for the item received.

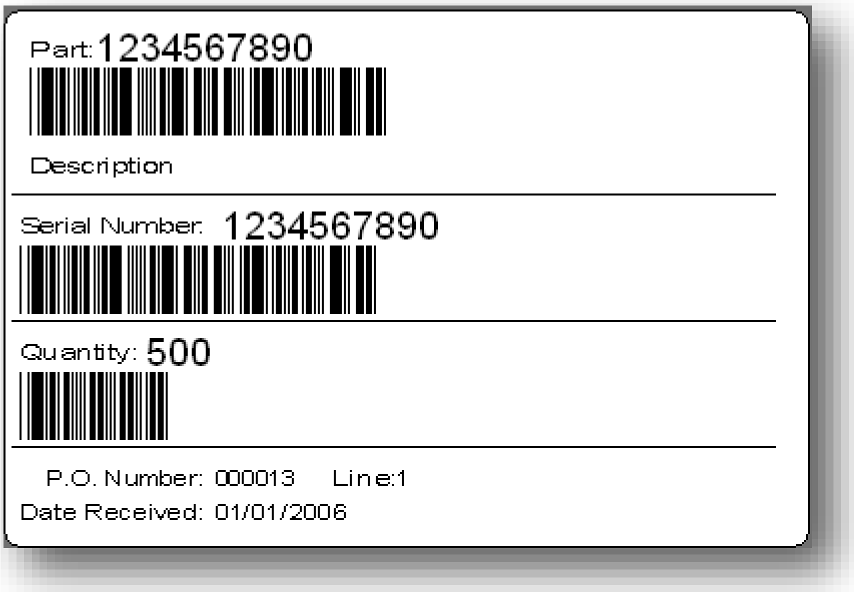


Serial Number – Key the quantity of labels to be printed. If 0 is entered, upon pressing Enter the transaction will be completed and no labels will print.

Quantity Printed on Label – Key the value that should display in the quantity field of the label.

Printer – Press F2 key on device to display a list of available printers as defined in the printer section of the configuration.

OK – Press Enter to complete this transaction. The indicated quantity of labels will print to the printer selected. The labels are a standard 4 x 6 label which appears as follows:



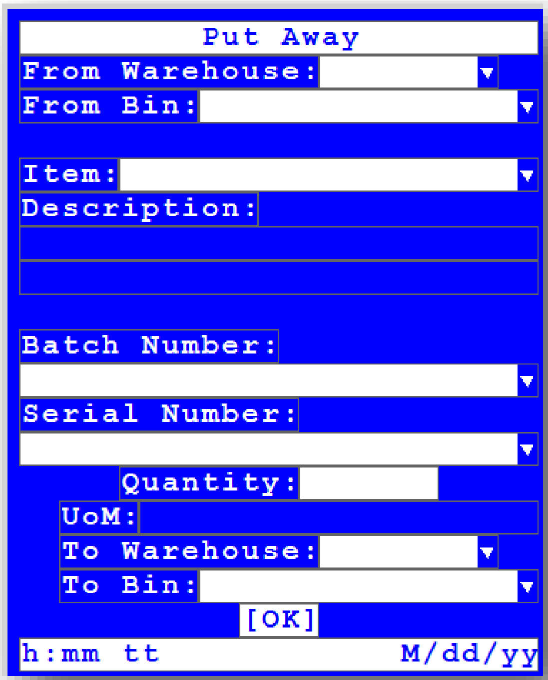
A Note Concerning Label Printing

The standard receiving label is supported on Intermec 3400, Zebra Z6M and Sato CL408e printers. Support for the standard label printing on the supported printers will be provided as part of your SFDC maintenance agreement. However, any support for adding unsupported printers, modifying the output of the labels, changing the layout of the labels or printer configuration and/or communication troubleshooting will be considered a billable service.

If you wish to attempt generating a new label format on your own, you must use BarTender from Seagull Scientific. This application is used to create printer output files from the label format files that are provided with SFDC. Please refer to the BarTender documentation for more information. If you want The SMS Group to assist in the creation of the printer output files, this can be provided as a billable service.

Put Away

The Put Away transaction is used to transfer goods that were received to a receiving bin to their warehouse bin locations. Selecting Put Away from the Purchasing Menu will display the following screen:



From Warehouse – Key or scan the from warehouse where the received goods were received into. Pressing the F2 key will display a list of all warehouses.

From Bin – Key or scan the from bin where the received goods were received into. Pressing the F2 key will display a list of all bins.
Item – Key or scan the item being put away. Pressing the F2 key will display a list of all items in the entered from warehouse and bin, along with the quantity.

Description – ***Description*** – This will display the description of the item being put away.

Batch Number – Key or scan the batch number the item is issued from. Pressing the F2 key will display a list available batches for issue. This field will only be required for batch controlled items.

Serial Number – Key or scan the serial number the item is issued from. Pressing the F2 key will display a list available serial numbers for issue. This field will only be required for serial controlled items.

Quantity – Key or scan the quantity being transferred. If the item is serial controlled, this field will default to 1.

UOM – Display only field of the unit of measure for the inventory item.

To Warehouse – Key or scan the warehouse the item is being transferred to. Pressing the F2 key will display a list of all warehouses available for location transfer.

To Bin – Key or scan the bin the item is transferred to. Pressing the F2 key will display a list of all bins for the selected warehouse available for transfer.

OK – Hitting enter here will finish the transaction and a location transfer transaction will be posted to SAP B1 for the item scanned for the transfer. The system will remember the from warehouse and bin and return the user to the item prompt for put away of the next item.

Inventory Menu

Selecting Inventory from the Main Menu will display the following screen: :

Below is a brief description of each of the Inventory Menu options. The user has the choice of hitting the hot key (which is the number to the left of the menu) or scrolling down to the desired menu option and pressing enter. To exit a menu or screen press the (ESC) escape key.

1. ***Goods Receipt***

2. ***Goods Issue***

3. ***Transfer Menu***
4. ***Picklists***
5. ***Inventory Counting***
6. ***Inventory Inquiry***
7. ***Pallet Menu***

Goods Receipt

The Goods Receipt transaction is used to receive goods in for the purpose of creating inventory. Selecting Goods Receipt from the Inventory Menu will display the following screen:

Item - Key or scan the Item.

Description – This will display the description of the item being received.

Quantity – Key or scan the quantity being received. If the item is batch or serial controlled, the user will be taken to the batch or serial collection screen.

UOM – Display only field of the unit of measure for the inventory item.

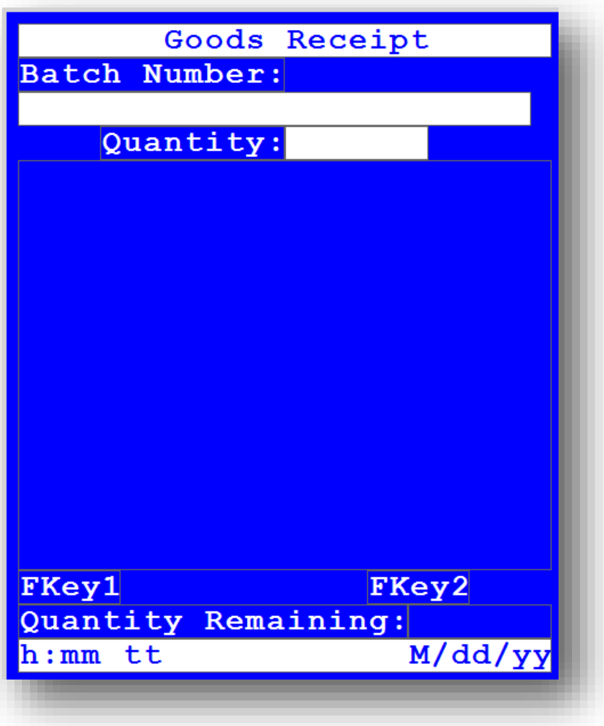
Warehouse – Key or scan the warehouse the item is being received to. Pressing the F2 key will display a list of all warehouses available for receipt.

Bin – Key or scan the bin the item is received to. Pressing the F2 key will display a list of all bins for the selected warehouse available for receipt.

Last Item – If the item being received is the last item, user will key in Y, else, if more items are to be received, user will key in N.

OK – Hitting enter here will finish the transaction. If the user entered N for last item, they will be returned to the item prompt for receipt of the next item. If they entered a Y for last item, the transaction will complete and a goods receipt transaction will be posted to SAP B1 for the items scanned for the receipt.

If batch numbers are required



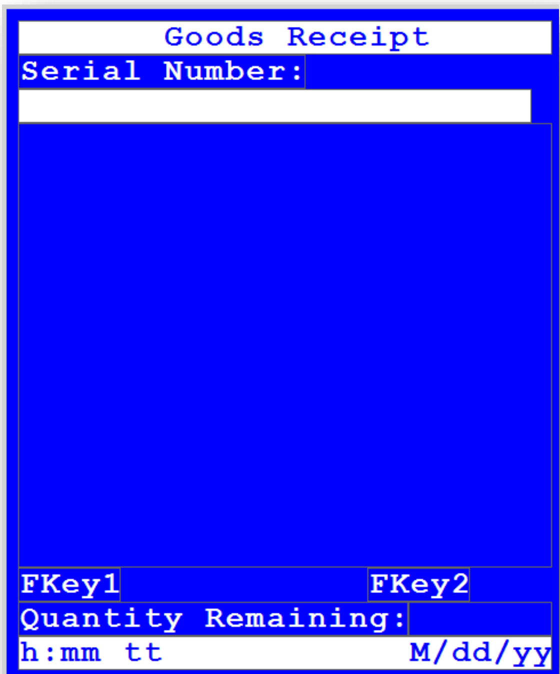
Batch Number – Key or scan the Batch Number. Pressing the F2 key will display a list of all batch numbers.

Quantity – Key or scan the batch quantity. If the quantity entered here equals the quantity entered on the first screen, the user will be returned to the warehouse prompt, else the user will be returned to the batch number field to enter another batch number and quantity, until enough batch quantity is entered for the item quantity.

Quantity Remaining – this will display the quantity that needs batch numbers provided.

FKey1 FKey2 – the user will be able to hit the function keys shown to edit the list of batch numbers scanned, and delete the batch number from the list if needed. Other function keys will be used for deletion and for completing.

If serial numbers are required



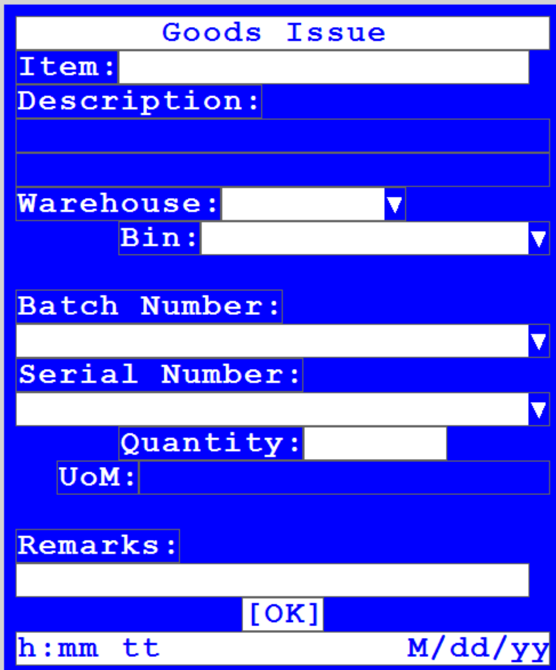
Serial Number – Key or scan the serial Number. Pressing the F2 key will display a list of all serial numbers. If the entered serial numbers equals the quantity entered on the first screen, the user will be returned to the warehouse prompt, else the user will be returned to the serial number field to enter another serial number, until enough serial numbers are entered for the item quantity.

Quantity Remaining – this will display the quantity that needs serial numbers provided.

FKey1 FKey2 – the user will be able to hit the function keys shown to edit the list of serial numbers scanned, and delete the serial number from the list if needed. Other function keys will be used for deletion and for completing.

Goods Issue

The Goods Issue transaction is used to relieve goods from inventory. Selecting Goods Issue from the Inventory Menu will display the following screen:



Item - Key or scan the Item.

Description – This will display the description of the item being issued.

Warehouse – Key or scan the warehouse the item is being issued from. Pressing the F2 key will display a list of all warehouses available for issue.

Bin – Key or scan the bin the item is issued from. Pressing the F2 key will display a list of all bins for the selected warehouse available for issue.

Batch Number – Key or scan the batch number the item is issued from. Pressing the F2 key will display a list available batches for issue. This field will only be required for batch controlled items.

Serial Number – Key or scan the serial number the item is issued from. Pressing the F2 key will display a list available serial numbers for issue. This field will only be required for serial controlled items.

Quantity – Key or scan the quantity being issued. If the item is serial controlled, this field will default to 1.

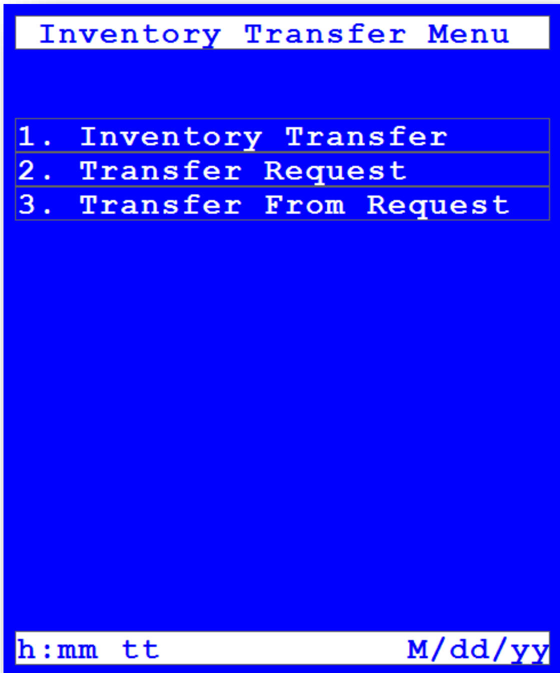
UOM – Display only field of the unit of measure for the inventory item.

Remarks – user can key in any remarks about the issue.

OK – Hitting enter here will finish the transaction and a goods issue transaction will be posted to SAP B1 for the item scanned for the issue.

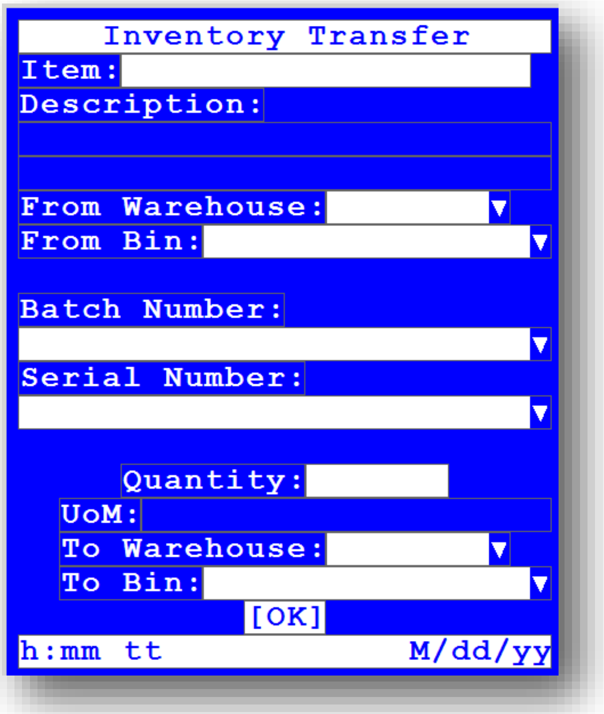
Transfer Menu

The Transfer Menu transaction is used to move inventory between various warehouse and bins. Selecting Transfer Menu from the Inventory Menu will display the following menu:



Inventory Transfer

The Inventory Transfer transaction is used to move goods from one warehouse location to another. Selecting Inventory Transfer from the Transfer Menu will display the following screen:



\

Item - Key or scan the Item.

Description – This will display the description of the item being transferred.

From Warehouse – Key or scan the warehouse the item is being transferred from. Pressing the F2 key will display a list of all warehouses available for location transfer.

From Bin – Key or scan the bin the item is transferred from. Pressing the F2 key will display a list of all bins for the selected warehouse available for transfer.

Batch Number – Key or scan the batch number the item is issued from. Pressing the F2 key will display a list available batches for issue. This field will only be required for batch controlled items.

Serial Number – Key or scan the serial number the item is issued from. Pressing the F2 key will display a list available serial numbers for issue. This field will only be required for serial controlled items.

Quantity – Key or scan the quantity being transferred. If the item is serial controlled, this field will default to 1.

UOM – Display only field of the unit of measure for the inventory item.

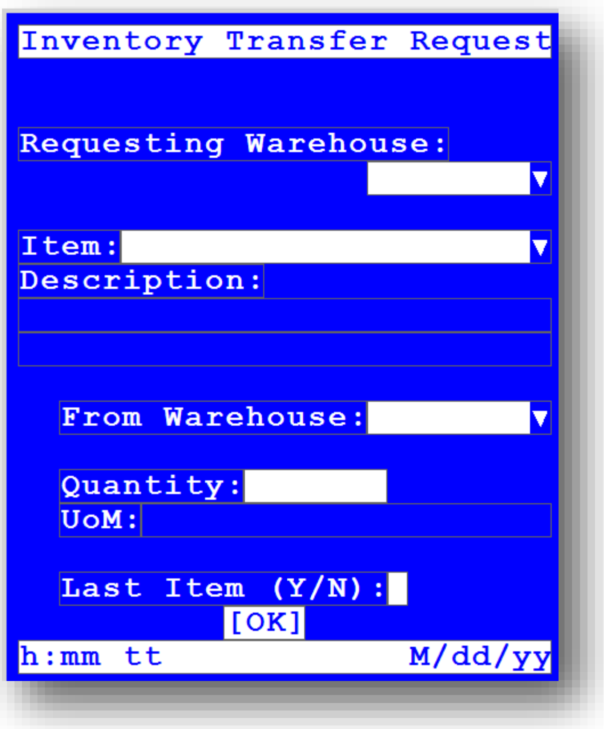
To Warehouse – Key or scan the warehouse the item is being transferred to. Pressing the F2 key will display a list of all warehouses available for location transfer.

To Bin – Key or scan the bin the item is transferred to. Pressing the F2 key will display a list of all bins for the selected warehouse available for transfer.

OK – Hitting enter here will finish the transaction and a location transfer transaction will be posted to SAP B1 for the item scanned for the transfer.

Transfer Request

The Inventory Transfer Request transaction is used to make requests to have inventory moved to locations. Selecting Inventory Transfer Request from the Transfer Menu will display the following screen:



Requesting Warehouse - Key or scan the warehouse requesting the transfer. Pressing the F2 key will display a list of warehouses available for the request.

Item - Key or scan the Item.

Description – This field will display the description of the item entered.

From Warehouse - Key or scan the warehouse the item is to be transferred from. Pressing the F2 key will display a list of available warehouse to transfer from.

Quantity - Key or scan the quantity for the transfer request.

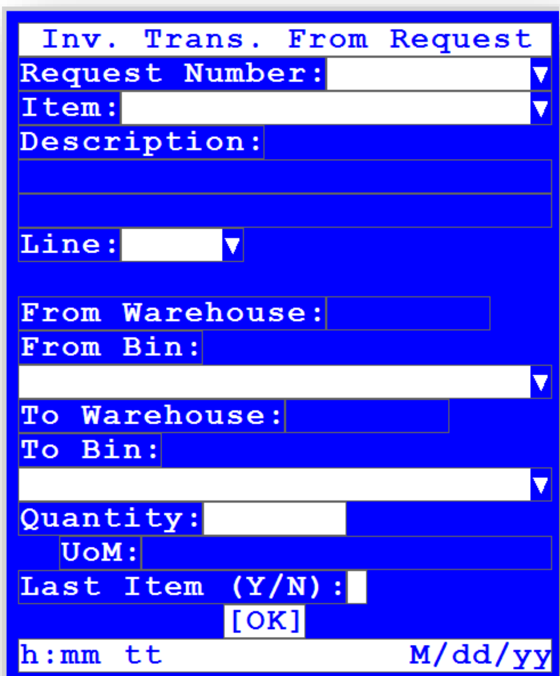
UOM – Display only field of the unit of measure of the inventory item.

Last Item – If the item being requested is the last item, user will key in Y, else, if more items are to be requested, user will key in N.

OK – Hitting enter here will finish the transaction. If the user entered N for last item, they will be returned to the item prompt for request of the next item. If they entered a Y for last item, the transaction will complete and a location transfer request transaction will be posted to SAP B1 for the items scanned for the request.

Transfer From Request

The Transfer From Request transaction is used to move inventory using a transfer request as the driving data for the moves. Selecting Transfer From Request from the Transfer Menu will display the following screen:



\

Request Number - Key or scan the location transfer request number. Pressing the F2 key will display a list available location request transfers with the date the transfer was requested.

Item - Key or scan the Item. Pressing the F2 key will display a list of all items on the transfer request along with the transfer request quantity.

Line – This field will only be required if the item is on multiple lines of the transfer. Key or scan the line number. Pressing the F2 key will display all lines for the item.

From Warehouse – This will display the warehouse that the item is to be pulled from for transfer.

From Bin – Key or scan the bin the item is transferred from. Pressing the F2 key will display a list of all bins for the displayed warehouse available for transfer.

To Warehouse – This will display the warehouse that the item is to be transferred to.

To Bin – Key or scan the bin the item is transferred to. Pressing the F2 key will display a list of all bins for the displayed warehouse available for transfer.

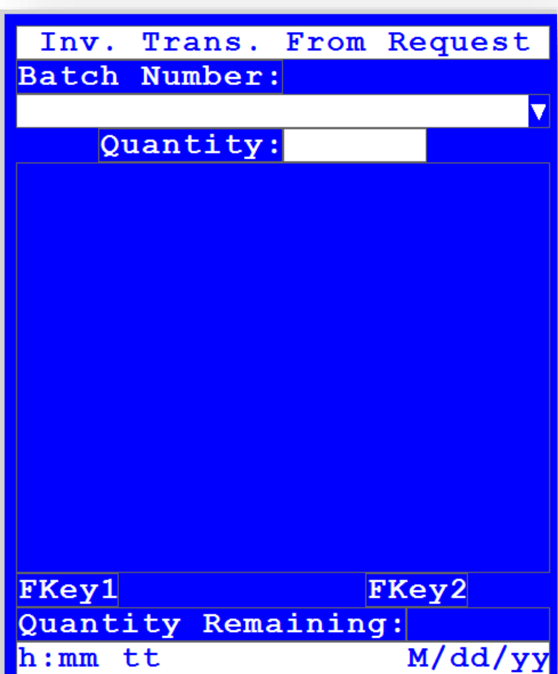
Quantity – Key or scan the quantity being transferred. Field will default to the quantity from the location transfer request.

UOM – Display only field of the unit of measure of the inventory item.

Last Item – If the item being transferred is the last item, user will key in Y, else, if more items are to be transferred, user will key in N.

OK – Hitting enter here will finish the transaction. If the user entered N for last item, they will be returned to the item prompt for transfer of the next item. If they entered a Y for last item, the transaction will complete and a location transfer transaction will be posted to SAP B1 for the items scanned for the transfer.

If batch numbers are required



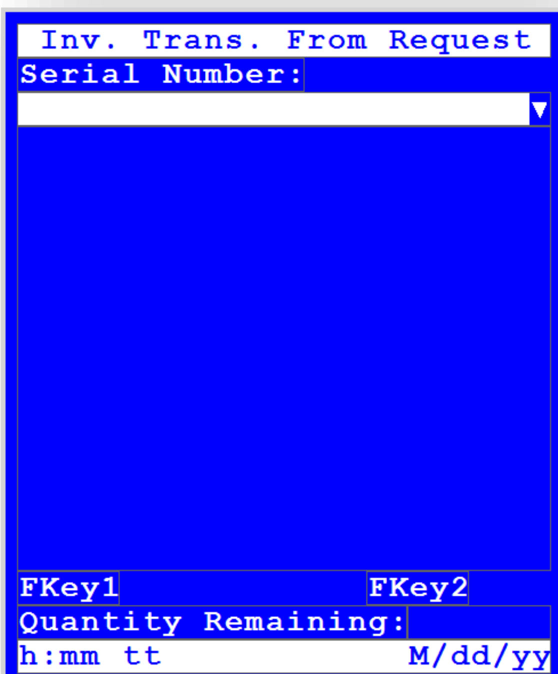
Batch Number – Key or scan the Batch Number. Pressing the F2 key will display a list of all batch numbers.

Quantity – Key or scan the batch quantity. If the quantity entered here equals the quantity entered on the first screen, the user will be returned to the warehouse prompt, else the user will be returned to the batch number field to enter another batch number and quantity, until enough batch quantity is entered for the item quantity.

Quantity Remaining – this will display the quantity that needs batch numbers provided.

FKey1 FKey2 – the user will be able to hit the function keys shown to edit the list of batch numbers scanned, and delete the batch number from the list if needed. Other function keys will be used for deletion and for completing.

If serial numbers are required



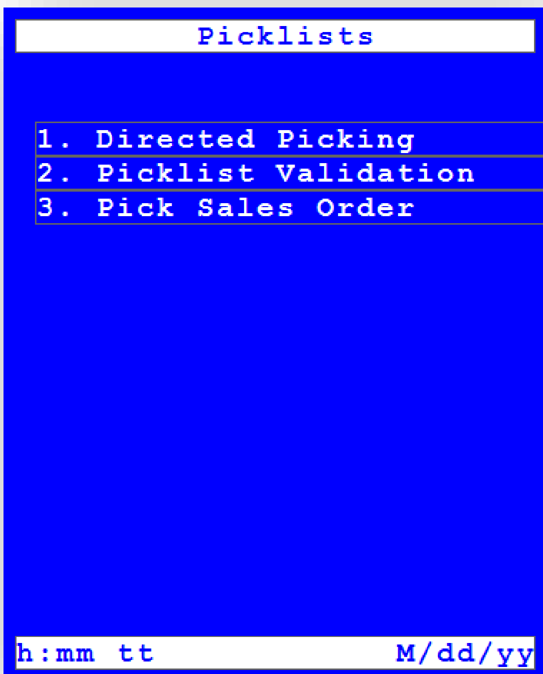
Serial Number – Key or scan the serial Number. Pressing the F2 key will display a list of all serial numbers. If the entered serial numbers equals the quantity entered on the first screen, the user will be returned to the warehouse prompt, else the user will be returned to the serial number field to enter another serial number, until enough serial numbers are entered for the item quantity.

Quantity Remaining – this will display the quantity that needs serial numbers provided.

FKey1 FKey2 – the user will be able to hit the function keys shown to edit the list of serial numbers scanned, and delete the serial number from the list if needed. Other function keys will be used for deletion and for completing.

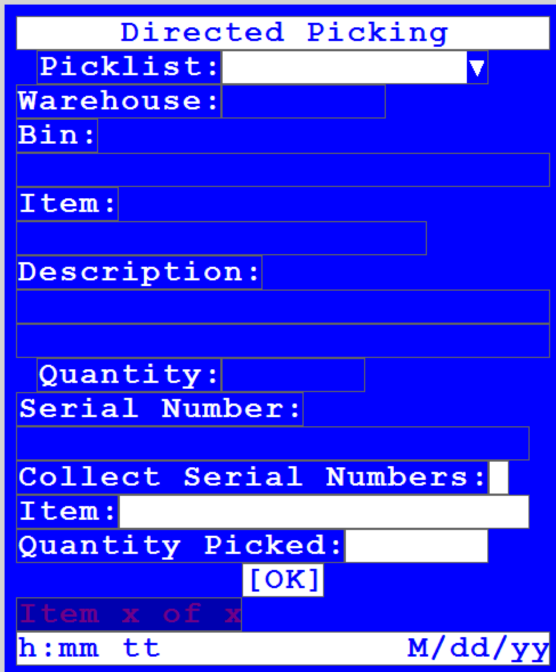
Picklists

The Picklist transaction is used to .Selecting Picklist from the Inventory Menu will display the following menu:



Directed Picking

The Directed Picking transaction is used to direct a user around the warehouse to pick items for fulfilling orders. Selecting Directed Picking from the Picklist Menu will display the following screen:



\

Picklist - Key or scan the picklist. Pressing the F2 key will list of open picklist along with the customer and sales order the picklist is for.

Warehouse – Display only field of the warehouse the pick is to be from.

Bin – Display only field of the bin the pick is to be from.

Item – Display only field of the item to be picked.

Description – Display only field of the item description.

Quantity – Display only field of the quantity to be picked.

Serial Number – If the item is serial or batch controlled, and serial or batch numbers are pre-allocated for the picklist, this field will display the serial or batch number to be picked. Caption of this field will change based on item being batch or serial controlled

Collect Serial Number – If the item is serial or batch controlled, and serial or batch numbers are not pre-allocated, the user can enter Y or N for whether they are wanting to collect serial or batch numbers for the item being picked.

Item – User will key in or scan the item being picked. This value will need to match the item displayed above.

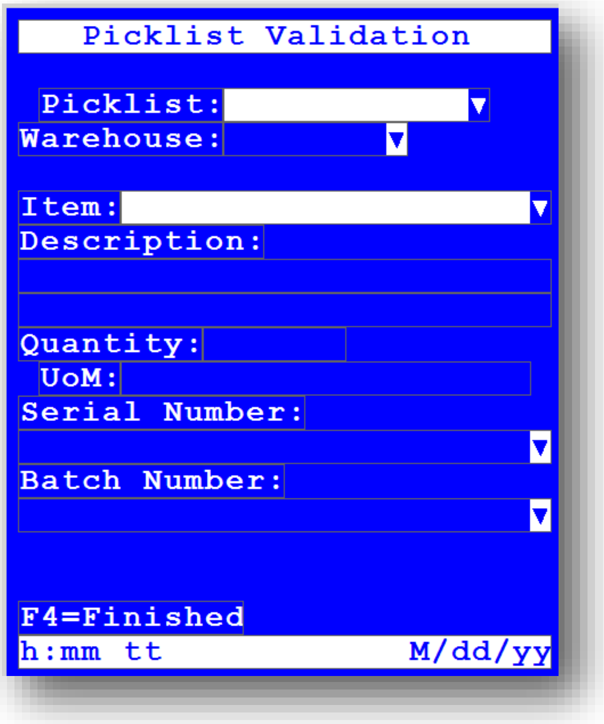
Quantity Picked – Key in or scan the quantity being picked. Value entered cannot exceed the quantity above. If the item is batch or serial controlled, the user will be taken to the batch or serial collection screen.

Item x of x – this will display to the user the total number of items on the picklist and where they are in the process of the pick.

OK – Hitting enter here will finish the transaction. If the item is not the last item on the picklist, the screen will display the next pick and the user will returned to the next entry field. If this is the last item for the picklist, the transaction will complete and a picklist transaction will be posted to SAP B1 for the items scanned for the request.

Picklist Validation

The Picklist Validation transaction is used to verify that all items for an order were properly picked. Selecting Picklist Validation from the Picklist Menu will display the following screen:



Picklist - Key or scan the picklist. Pressing the F2 key will list of open picklist along with the customer and sales order the picklist is for.

Warehouse – Display only field of the warehouse the pick is to be from.

Item – User will key in or scan the item being picked. Pressing the F2 key will display all parts on the picklist along with quantity. If the item is not serial or batch controlled, the field will clear for the next item.

Description – Display only field of the item description.

Quantity – Display only field of the quantity to be picked.

UOM – Display only field of the unit of measure of the inventory item.

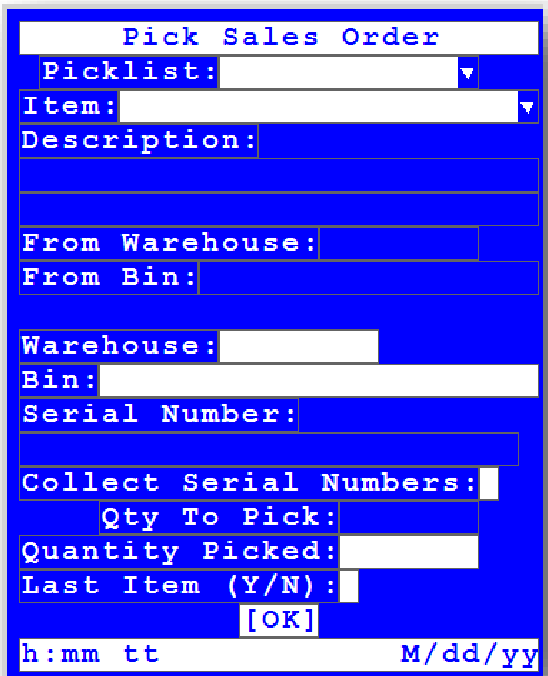
Serial Number – If the item is serial controlled, the user will be required to scan serial numbers that total up to the quantity displayed in the quantity field.

Batch Number – If the item is batch controlled, the user will be required to scan batch numbers that total up to the quantity displayed in the quantity field.

F4=Finished – If the user does not wish to pick all items on the picklist, they can press the F4 key and complete the picklist and post the transaction to SAP B1. If the user scan all items no the picklist, the transaction will post the picklist transaction to SAP B1 without user needing to press F4.

Pick Sales Order

The Pick Sales oRder transaction is used to pick a sale order picklist in any order. Selecting Pick Sales Order from the Picklist Menu will display the following screen:



Picklist - Key or scan the picklist. Pressing the F2 key will list of open picklist along with the customer and sales order the picklist is for.

Item – User will have to press F2 to see a list of items on the picklist. List will show item along with quantity remaining to be picked for the item.

Description – Display only field of the item description.

From Warehouse – Display only field of the warehouse the pick is to be from.

From Bin – Display only field of the bin the pick is to be from.

Warehouse – Scan the warehouse to confirm what warehouse the pick is to be from. Value must match the value displayed in the from warehouse field.

Bin – Scan the bin to confirm what warehouse the pick is to be from. Value must match the value displayed in the from bin field.

Serial Number – If the item is serial or batch controlled, and serial or batch numbers are pre-allocated for the picklist, this field will display the serial or batch number to be picked. Caption of this field will change based on item being batch or serial controlled

Collect Serial Number – If the item is serial or batch controlled, and serial or batch numbers are not pre-allocated, the user can enter Y or N for whether they are wanting to collect serial or batch numbers for the item being picked.

Qty To Pick – Display value of the quantity left to pick for the entered item.

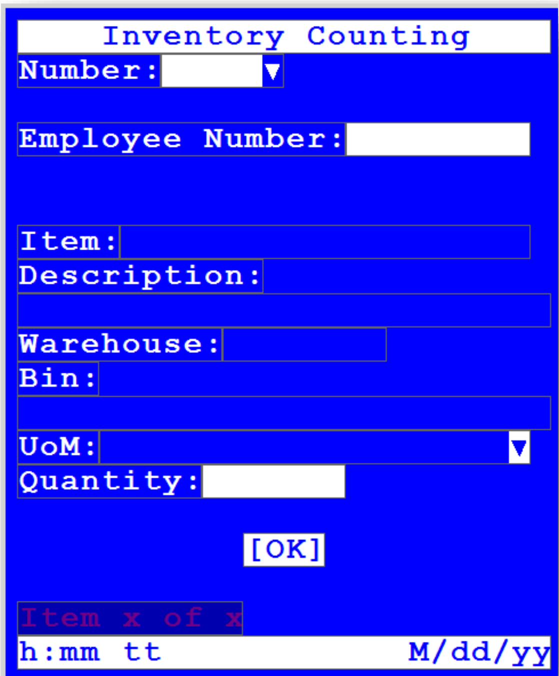
Quantity Picked – Key in or scan the quantity being picked. Value entered cannot exceed the quantity above. If the item is batch or serial controlled, the user will be taken to the batch or serial collection screen.

Last Item – If the item being picked is the last item, user will key in Y, else, if more items are to be picked, user will key in N.

OK – Hitting enter here will finish the transaction. If this is the last item for the picklist, the transaction will complete and a picklist transaction will be posted to SAP B1 for the items scanned for the request. If the user entered N for last item, they will return to the item prompt to pick another item.

Inventory Counting

The Inventory Counting transaction is used to count inventory in the warehouse to verify what the system says is in inventory is actually what is in inventory. Selecting Inventory Counting from the Inventory Menu will display the following screen:



Number - Key or scan the count number. Pressing the F2 key will display a list of all open counts.

Employee Number - Key or scan the employee number if needed.

Item – Display only field of the item to be counted.

Description – Display only field of the description of the item to be counted.

Warehouse – Display only field of the warehouse the item to be counted is in.

Bin – Display only field of the bin the item to be counted is in.

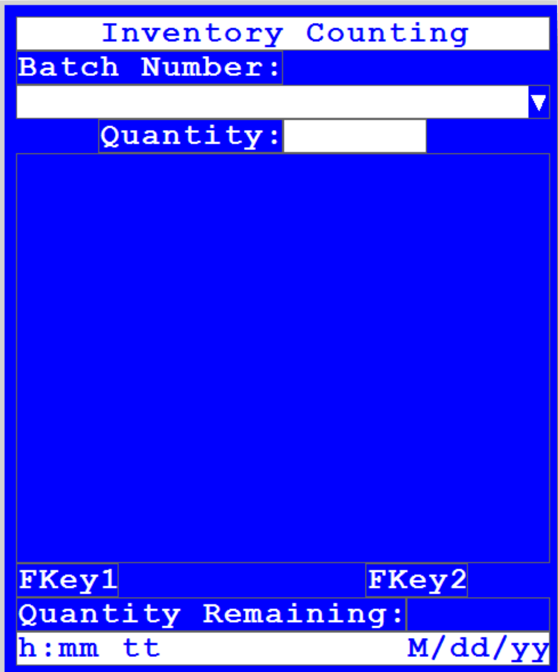
UOM – Display only field of the unit of measure for the item to be counted.

Quantity – Key in or scan the quantity for the item to be counted. If the item is serial or batch controlled, user will be taken to serial or batch collection screens.

Item x of x – this will display to the user the total number of items on the count and where they are in the process of the count.

OK – Hitting enter here will finish the transaction. If the item is not the last item on the count, the screen will display the next item to count and the user will returned to the quantity field. If this is the last item for the count, the transaction will complete and an inventory count transaction will be posted to SAP B1 for the items scanned for the inventory count.

If batch numbers are required



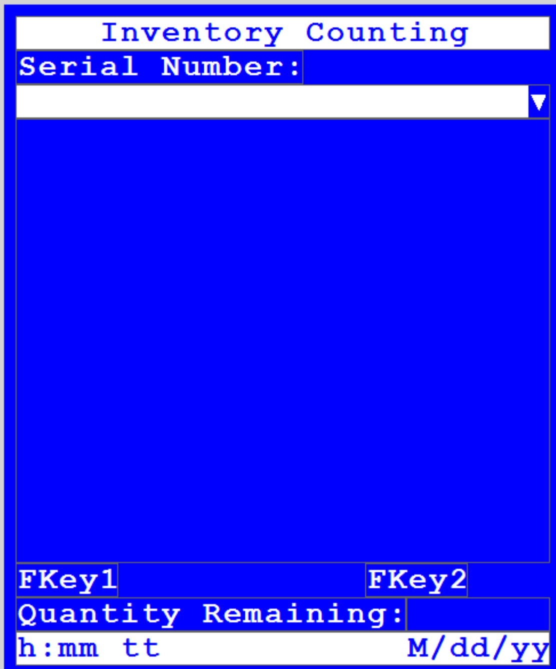
Batch Number – Key or scan the Batch Number. Pressing the F2 key will display a list of all batch numbers.

Quantity – Key or scan the batch quantity. If the quantity entered here equals the quantity entered on the first screen, the user will be returned to the warehouse prompt, else the user will be returned to the batch number field to enter another batch number and quantity, until enough batch quantity is entered for the item quantity.

Quantity Remaining – this will display the quantity that needs batch numbers provided.

FKey1 FKey2 – the user will be able to hit the function keys shown to edit the list of batch numbers scanned, and delete the batch number from the list if needed. Other function keys will be used for deletion and for completing.

If serial numbers are required



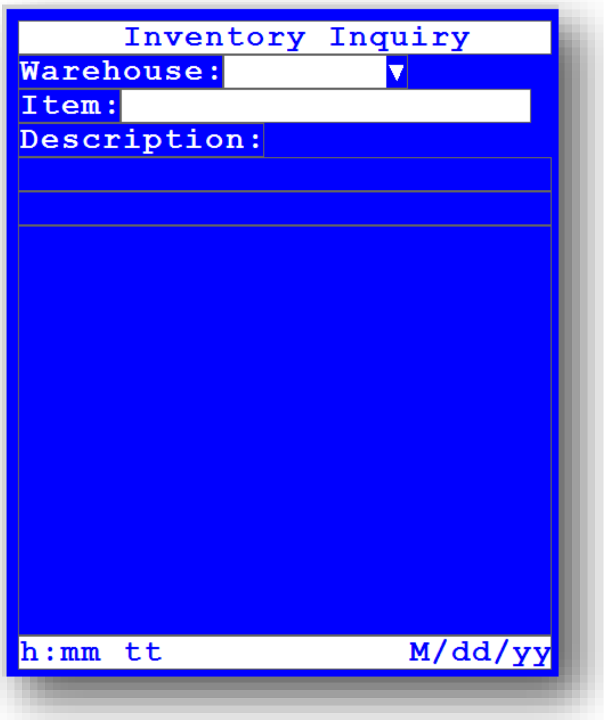
Serial Number – Key or scan the serial Number. Pressing the F2 key will display a list of all serial numbers. If the entered serial numbers equals the quantity entered on the first screen, the user will be returned to the warehouse prompt, else the user will be returned to the serial number field to enter another serial number, until enough serial numbers are entered for the item quantity.

Quantity Remaining – this will display the quantity that needs serial numbers provided.

FKey1 FKey2 – the user will be able to hit the function keys shown to edit the list of serial numbers scanned, and delete the serial number from the list if needed. Other function keys will be used for deletion and for completing.

Inventory Inquiry

The Inventory Inquiry transaction is used to check inventory levels for items in the warehouse. Selecting Inquiry Counting from the Inventory Menu will display the following screen:



Warehouse - Key or scan the warehouse. Pressing the F2 key will display all available warehouses. This field is not required.

Item - Key or scan the item.

Description – Display only field of the description of the item entered.

Inquiry List – This list will display all warehouse and bins and quantities for the item and warehouse entered. This list is scrollable and if the enter key is pressed on a line, inventory detail screen will be display, as shown below.

Inventory Details

Warehouse – Display only field of the warehouse code and warehouse description.

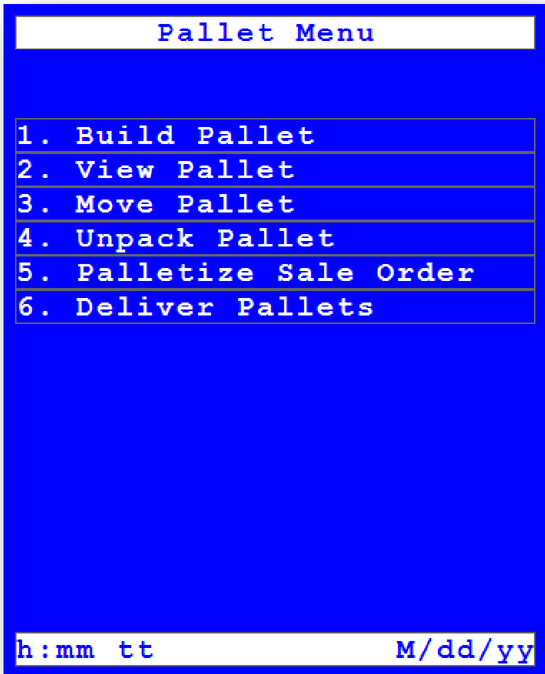
Bin – If the item from the Inventory Inquiry list was in a bin, the bin of the selected item will be displayed here.

On Hand – Display only value of the on hand quantity for the item in the selected warehouse/bin.

List – The list on this screen will display the batch or serial numbers, if the item is batch or serial controlled, for the item in the selected warehouse/bin. List will display a scrollable list of the batch/serial and the quantity of each.

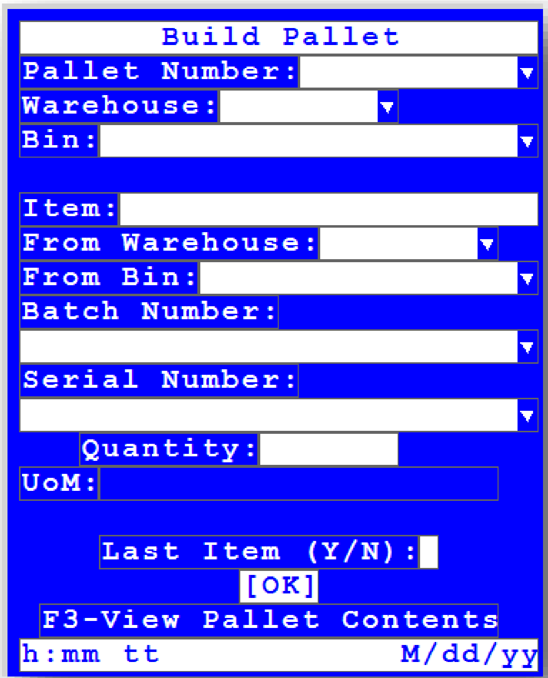
Pallet Menu

The Pallet Menu is used to build inventory onto pallets allowing for moving of multiple items at one time. Selecting Pallet Menu from the Inventory Menu will display the following menu:



Build Pallet

The Build Pallet transaction is used to create a pallet and add items to the pallet. Selecting Build Pallet from the Pallet Menu will display the following screen:



Pallet Number – Scan or enter the pallet number to add items to.   Pressing F2 will display a list of existing pallets and an option for creating a new pallet.

Warehouse – Field will only prompt for entry if the pallet is a new pallet. Key or scan the warehouse the pallet is being created in. Pressing the F2 key will display a list of all warehouses.

Bin – Field will only prompt for entry if the pallet is a new pallet. Key or scan the bin the item is transferred from. Pressing the F2 key will display a list of all bins for the selected warehouse.

Item – Enter or scan the item to be placed on the pallet.

From Warehouse – Key or scan the warehouse the item is from. Pressing the F2 key will display a list of all warehouses available for the entered item.

From Bin – Key or scan the bin the item is from. Pressing the F2 key will display a list of all bins for the selected warehouse available for the entered item

Batch Number – Key or scan the batch number the item is issued from. Pressing the F2 key will display a list available batches for issue. This field will only be required for batch controlled items.

Serial Number – Key or scan the serial number the item is issued from. Pressing the F2 key will display a list available serial numbers for issue. This field will only be required for serial controlled items.

Quantity – Key or scan the quantity being put onto the pallet. If the item is serial controlled, this field will default to 1.

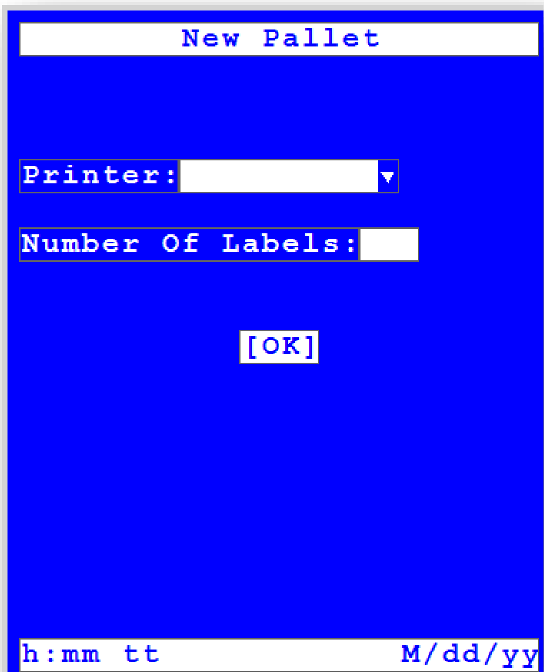
UOM – Display only field of the unit of measure for the inventory item.

Last Item – Enter Y or N in this field if the item being put on the pallet is the last item. If N is entered, the pallet number and warehouse and bin fields will remain and the user will be returned to the Item field.

OK – press enter here to finish the transaction. This will update fields in UDTs with information about the item added to the pallet. If the from warehouse and bin are different than the pallet warehouse and bin, a location transfer for the item will also be completed.

F3-View Pallet Contents – any time after a pallet number has been entered, the user can press F3 to get a list of items quantities on the pallet.

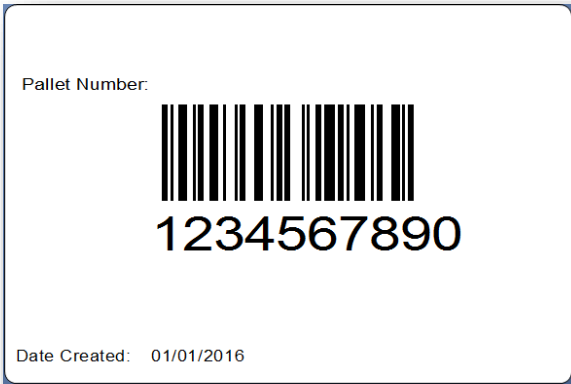
If a new pallet is being created



Printer – Pressing the F2 key will display a list of all printers available. Field will default to last printer selected by the user.

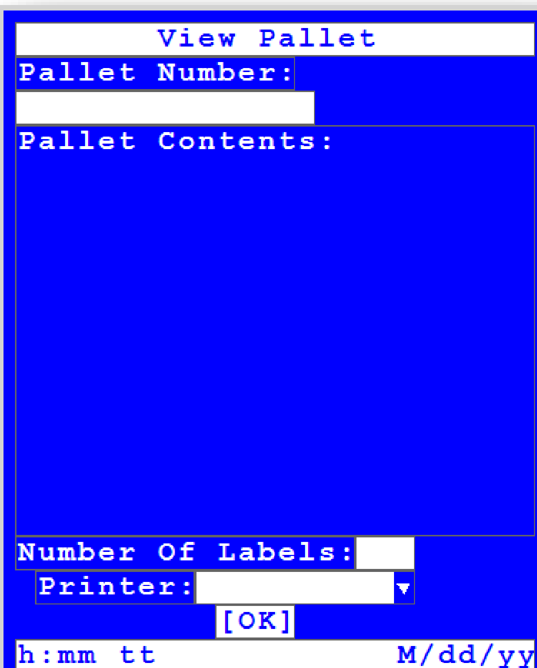
Number Of Label – enter a number of labels for the pallet. Entering 0 will return to the warehouse field to continue building the new pallet.

OK – press enter to print the labels for the pallet. Focus will return to the Number of Labels field to allow for additional printing of pallet labels if required. Below is a sample image of the pallet label.



View Pallet

The View Pallet transaction is used to view contents of a pallet and reprint labels for the pallet. Selecting View Pallet from the Pallet Menu will display the following screen:



Pallet Number – Enter or scan the pallet number to view.

Pallet Contents – a list of all items and quantities will display in the list for the user to scroll.

Printer – Pressing the F2 key will display a list of all printers available. Field will default to last printer selected by the user.

OK – press enter to print the labels for the pallet. Focus will return to the Number of Labels field to allow for additional printing of pallet labels if required. Below is a sample image of the pallet label.

Move Pallet

The Move Pallet transaction is used to move pallets of items from one warehouse/bin to another. Selecting Move Pallet from the Pallet Menu will display the following screen:

Pallet Number – Enter or scan the pallet number to move.

From Warehouse– display only value of the warehouse the pallet is currently in.

From Bin– display only value of the bin the pallet is currently in.

Warehouse – Key or scan the warehouse the pallet is being transferred to. Pressing the F2 key will display a list of all warehouses available for transfer.

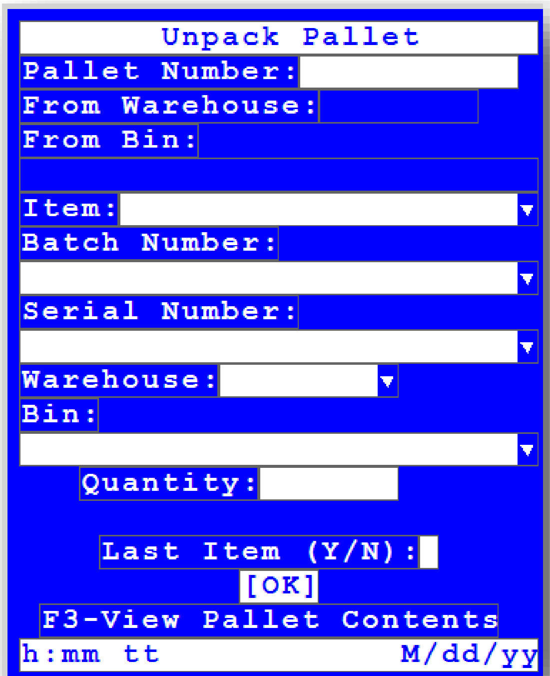
Bin – Key or scan the bin the pallet is transferred to. Pressing the F2 key will display a list of all bins for the selected warehouse available for transfer.

OK – pressing enter on the ok button will perform a location transfer of all items on the pallet to the new warehouse and bin. UDTs related to the pallet location will also be updated to reflect the move.

F3-View Pallet Contents – any time after a pallet number has been entered, the user can press F3 to get a list of items quantities on the pallet.

Unpack Pallet

The Unpack Pallet transaction is used to remove items from pallets to a warehouse/bin. Selecting Unpack Pallet from the Pallet Menu will display the following screen:



Pallet Number – Enter or scan the pallet number to unpack.

From Warehouse– display only value of the warehouse the pallet is currently in.

From Bin– display only value of the bin the pallet is currently in.

Item – Enter or scan the item to be placed on the pallet.

Warehouse – Key or scan the warehouse the item is being unpacked to. Pressing the F2 key will display a list of all warehouses available for the entered item.

From Bin – Key or scan the bin the item is being unpacked to. Pressing the F2 key will display a list of all bins for the selected warehouse available for the entered item

Batch Number – Key or scan the batch number the item is issued from. Pressing the F2 key will display a list available batches for the item on the pallet. This field will only be required for batch controlled items.

Serial Number – Key or scan the serial number the item is issued from. Pressing the F2 key will display a list available serial numbers for the item on the pallet. This field will only be required for serial controlled items.

Quantity – Key or scan the quantity being put onto the pallet. If the item is serial controlled, this field will default to 1.

Last Item – Enter Y or N in this field if the item being put on the pallet is the last item. If N is entered, the pallet number and from warehouse and from bin fields will remain and the user will be returned to the Item field.

OK – press enter here to finish the transaction. This will update fields in UDTs with information about the item removed to the pallet. If the from warehouse and bin are different than the pallet warehouse and bin, a location transfer for the item will also be completed.

F3-View Pallet Contents – any time after a pallet number has been entered, the user can press F3 to get a list of items quantities on the pallet.

Palletize Sales Order

The Palletize Sales Order transaction is used to create pallets of items from a sales order. Selecting Palletize Sales Order from the Pallet Menu will display the following screen:

Order No. – Enter or scan the sales order number to palletize items for.

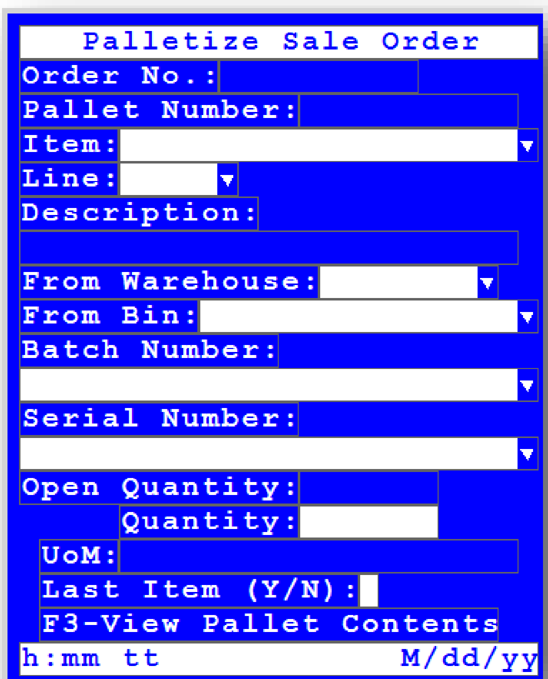
Pallet Number – Enter or scan the pallet number to palletize, or selected from the list a pallet associated with the indicated sales order. New Pallets can also be created by selecting New Pallet from the list.

Warehouse – Field will only prompt for entry if the pallet is a new pallet. Key or scan the warehouse the pallet is being created in. Pressing the F2 key will display a list of all warehouses.

Bin – Field will only prompt for entry if the pallet is a new pallet. Key or scan the bin the item is transferred from. Pressing the F2 key will display a list of all bins for the selected warehouse.

OK – press enter on this button to move to the next page of the transaction

F3-View Pallet Contents – any time after a pallet number has been entered, the user can press F3 to get a list of items quantities on the pallet.



Order No. – display only of the sales order number being palletized.

Order No. – display only of the pallet number being palletized.

Item – enter, scan or select from the list, the item from the sales order to be loaded to the pallet.

Line – If the item entered is on multiple lines of the sales order, user will need to enter or select the line number of the item being palletized.

From Warehouse – enter or select the warehouse the item being palletized from.

From Bin – if from warehouse is bin controlled, enter or select the bin the item being palletized from.

Batch Number – if from item being palletized is batch controlled, enter or select the batch number of the item being palletized.

Serial Number – if from item being palletized is serial controlled, enter or select the batch number of the item being palletized.

Open Quantity – display only field of the item/line quantity from the sales order that has not been palletized.

Quantity – enter the quantity of the item/line being palletized.

UOM – display only of the unit of measure for the item

Last Item (Y/N): – enter Y if this is the last item being put on this pallet and when the transaction completes, transaction will return to the order no field. Enter N if more items will be added to the current pallet, and when the transaction completes, transaction will return to the item field. At the end of the transaction, a location transfer will be competed(if needed) and the UDT will be updated to reflect what was palletized.

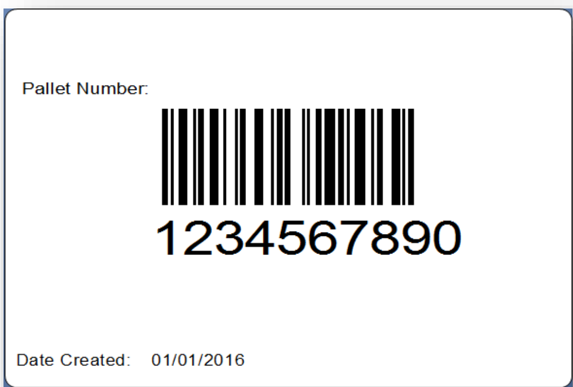
F3-View Pallet Contents – any time after a pallet number has been entered, the user can press F3 to get a list of items quantities on the pallet.

If a new pallet is being created

Printer – Pressing the F2 key will display a list of all printers available. Field will default to last printer selected by the user.

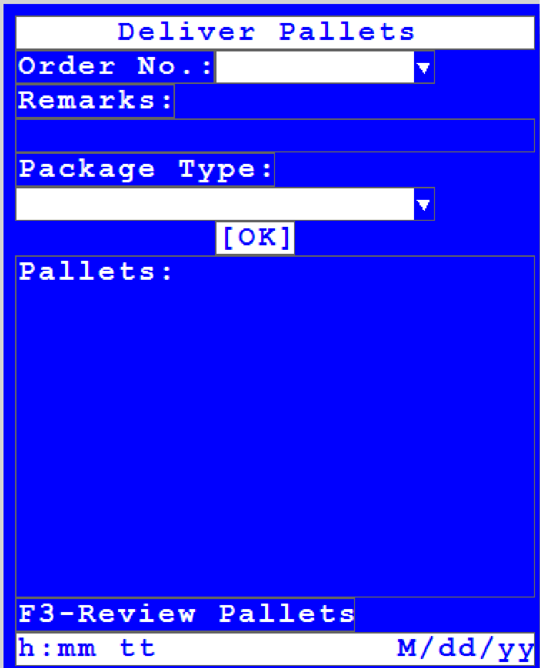
Number Of Label – enter a number of labels for the pallet. Entering 0 will return to the warehouse field to continue building the new pallet.

OK – press enter to print the labels for the pallet. Focus will return to the Number of Labels field to allow for additional printing of pallet labels if required. Below is a sample image of the pallet label.



Deliver Pallets

The Deliver Pallets transaction is used to create a sales delivery from pallets palletized for a sales order. Selecting Deliver Pallets from the Pallet Menu will display the following screen:



Order No. – Enter, scan or select a sales order to deliver. Only sales orders that have pallets associated with them in the UDT will be allowed.

Remarks – Display only field will show SHORT if not all items for the sales order entered have been palletized for delivery. Field will show COMPLETE if all items have been palletized.

Package Type – If the configuration setting Package Delivery Items is set to true, this prompt will display to the user, for them to enter the enter the package type that will be set on the pack slip for the items being delivered. Field will be optional.

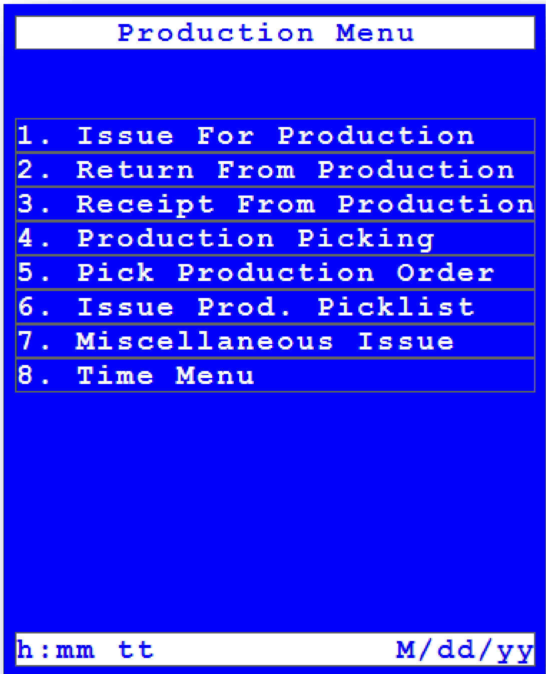
OK – press enter here to complete the transaction and create a sales delivery for all the items palletized on the pallets in the pallets list.

Pallets – list will display pallets that were palletized for the indicated sales order.

F3-Review Pallets – pressing F3 will set focus to the pallet list, where user can scroll the list, and then select a pallet to see items palletized on it.

Production Menu

Selecting Production from the Main Menu will display the following screen:

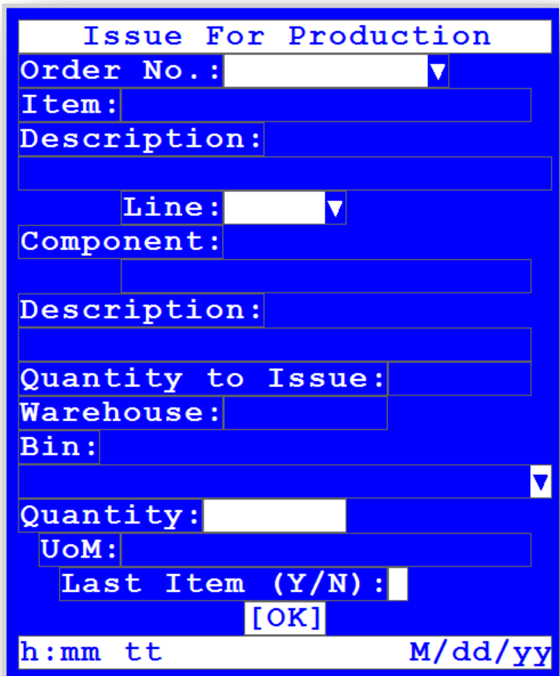


Below is a brief description of each of the Inventory Menu options. The user has the choice of hitting the hot key (which is the number to the left of the menu) or scrolling down to the desired menu option and pressing enter. To exit a menu or screen press the (ESC) escape key.

1. ***Issue For Production***
2. ***Return From Production***
3. ***Receipt From Production***
4. ***Production Picking***
5. ***Pick Production Order***
6. ***Issue Prod. Picklist***
7. ***Miscellaneous Issue***
8. ***Time Menu***

Issue For Production

The Issue For Production transaction is used to issue component items to jobs for making finished goods. Selecting Issue For Production from the Production Menu will display the following screen:



Order No. - Key or scan the Order Number. Pressing the F2 key will display a list of all orders and what item the order is for.

Item – Display only field of the item the order is for.

Description – Display only field of the description of the item.

Line - Key or scan the line number of the item being issues. Pressing the F2 key will display all lines for the issue, along with the part number and the quantity to be issued.

Component – Display only field of the item being issued.

Description – Display only field of description of the component being issued.

Quantity To Issue – Display only field of the quantity to be issued for the component.

Warehouse – Display only field of warehouse the component being issued is from.

Bin – Display only field of bin the component being issued is from.

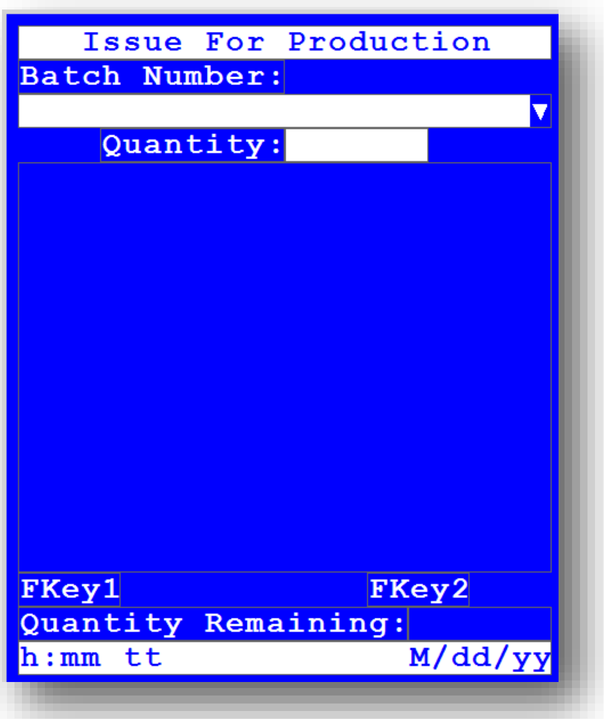
Quantity – Key in or scan the quantity being issued.

UOM – Display only field of the unit of measure of the inventory item.

Last Item – If the item being issued is the last item, user will key in Y, else, if more items are to be issued, user will key in N.

OK – Hitting enter here will finish the transaction. If the user entered N for last item, they will be returned to the item prompt for issue of the next item. If they entered a Y for last item, the transaction will complete and a production issue transaction will be posted to SAP B1 for the items scanned for the issue.

If batch numbers are required



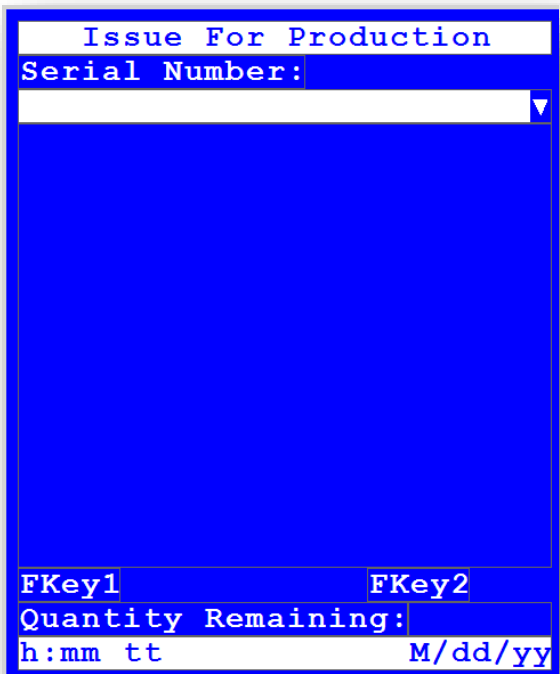
Batch Number – Key or scan the Batch Number. Pressing the F2 key will display a list of all batch numbers.

Quantity – Key or scan the batch quantity. If the quantity entered here equals the quantity entered on the first screen, the user will be returned to the warehouse prompt, else the user will be returned to the batch number field to enter another batch number and quantity, until enough batch quantity is entered for the item quantity.

Quantity Remaining – this will display the quantity that needs batch numbers provided.

FKey1 FKey2 – the user will be able to hit the function keys shown to edit the list of batch numbers scanned, and delete the batch number from the list if needed. Other function keys will be used for deletion and for completing.

If serial numbers are required



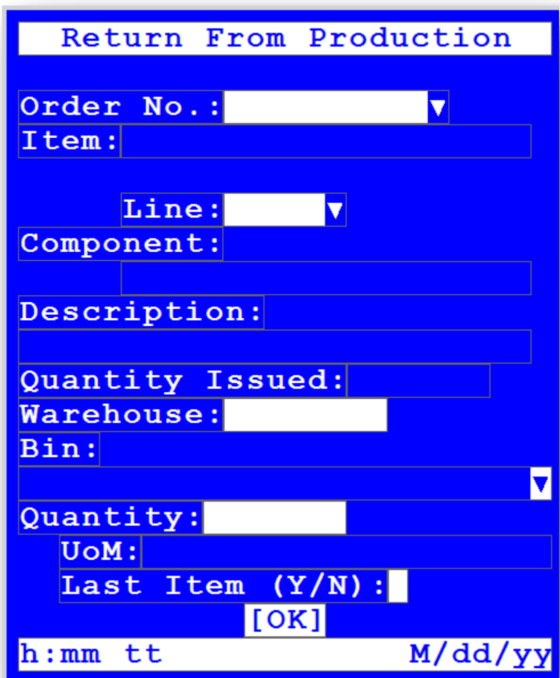
Serial Number – Key or scan the serial Number. Pressing the F2 key will display a list of all serial numbers. If the entered serial numbers equals the quantity entered on the first screen, the user will be returned to the warehouse prompt, else the user will be returned to the serial number field to enter another serial number, until enough serial numbers are entered for the item quantity.

Quantity Remaining – this will display the quantity that needs serial numbers provided.

FKey1 FKey2 – the user will be able to hit the function keys shown to edit the list of serial numbers scanned, and delete the serial number from the list if needed. Other function keys will be used for deletion and for completing.

Return From Production

The Return For Production transaction is used to return components issued to a job that were not used to make finished goods back into inventory. Selecting Return For Production from the Production Menu will display the following screen:



Order No. - Key or scan the Order Number. Pressing the F2 key will display a list of orders available for return.

Item – Display only field of the item the order is for.

Line - Key or scan the line number of the item being returned. Pressing the F2 key will display all lines for the return, along with the part number and the quantity to be issued.

Component – Display only field of the item being returned.

Description – Display only field of description of the component being returned.

Quantity Issued – Display only field of the quantity issued for the component.

Warehouse – Key in or scan the warehouse the component is being returned to. Pressing the F2 key will display a list of available warehouses.

Bin – Key in or scan the bin the component is being returned to. Pressing the F2 key will display a list of available bin for the warehouse selected.

Quantity – Key in or scan the quantity being returned.

UOM – Display only field of the unit of measure of the inventory item.

Last Item – If the item being returned is the last item, user will key in Y, else, if more items are to be returned, user will key in N.

OK – Hitting enter here will finish the transaction. If the user entered N for last item, they will be returned to the item prompt for return of the next item. If they entered a Y for last item, the transaction will complete and a production return transaction will be posted to SAP B1 for the items scanned for the return.

If batch numbers are required

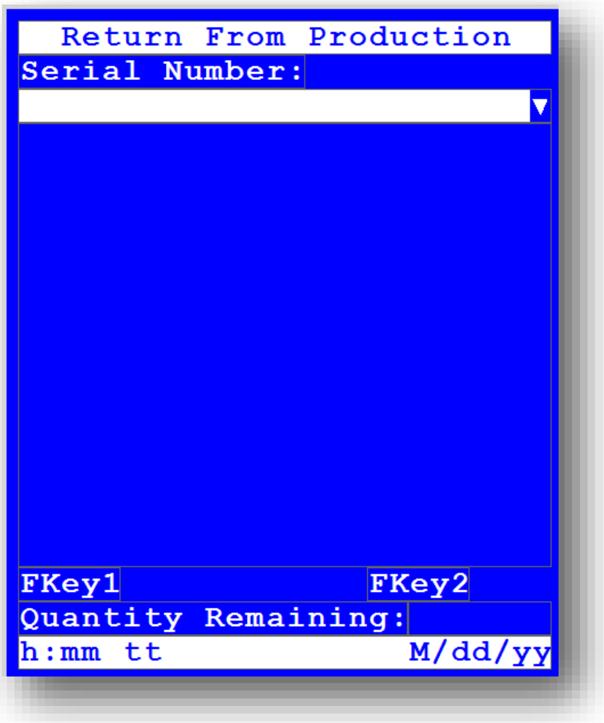
Batch Number – Key or scan the Batch Number. Pressing the F2 key will display a list of all batch numbers.

Quantity – Key or scan the batch quantity. If the quantity entered here equals the quantity entered on the first screen, the user will be returned to the warehouse prompt, else the user will be returned to the batch number field to enter another batch number and quantity, until enough batch quantity is entered for the item quantity.

Quantity Remaining – this will display the quantity that needs batch numbers provided.

FKey1 FKey2 – the user will be able to hit the function keys shown to edit the list of batch numbers scanned, and delete the batch number from the list if needed. Other function keys will be used for deletion and for completing.

If serial numbers are required



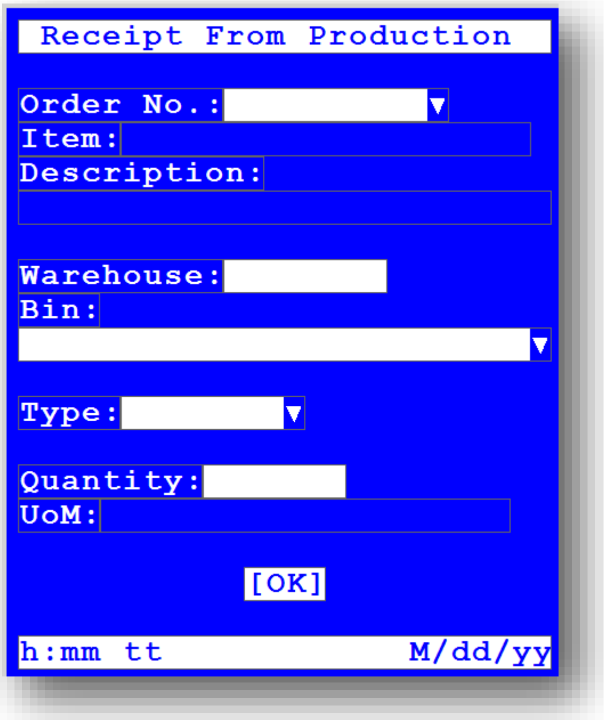
Serial Number – Key or scan the serial Number. Pressing the F2 key will display a list of all serial numbers. If the entered serial numbers equals the quantity entered on the first screen, the user will be returned to the warehouse prompt, else the user will be returned to the serial number field to enter another serial number, until enough serial numbers are entered for the item quantity.

Quantity Remaining – this will display the quantity that needs serial numbers provided.

FKey1 FKey2 – the user will be able to hit the function keys shown to edit the list of serial numbers scanned, and delete the serial number from the list if needed. Other function keys will be used for deletion and for completing.

Receipt From Production

The Receipt From Production transaction is used to accept finished goods that were made into the system. Selecting Receipt From Production from the Production Menu will display the following screen:



Order No. - Key or scan the Order Number. Pressing the F2 key will display a list of orders and the item the order is for.

Item – Display only field of the item the order is for.

Description – Display only field of the description of the item.

Warehouse - Key or scan the warehouse is being received to. Pressing the F2 key will display a list of available warehouses.

Bin - Key or scan the bin. Pressing the F2 key will display a list of bins for the warehouse entered.

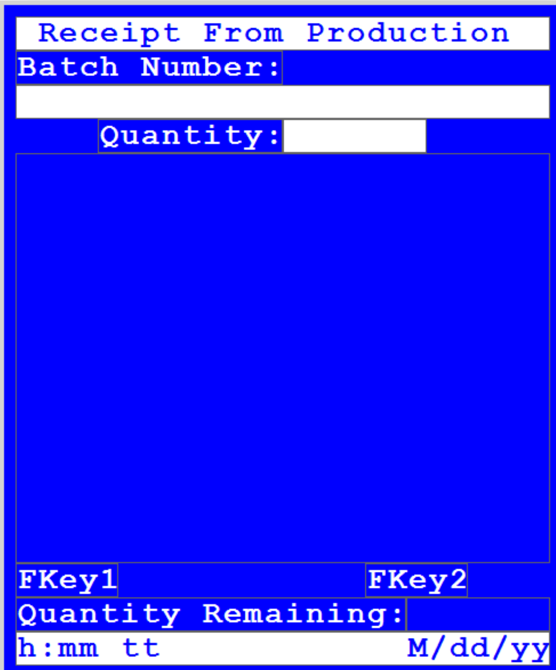
Type – Field will default to complete. Pressing the F2 key will display a list of available receipt types.

Quantity – Key in or scan the quantity being received. If the item is batch or serial controlled the user will be prompted to enter batch or serial information.

UOM – Display only field of the unit of measure of the inventory item.

OK – Hitting enter here will finish the transaction and a production receipt transaction will be posted to SAP B1 for the item scanned for the receipt.

If batch numbers are required



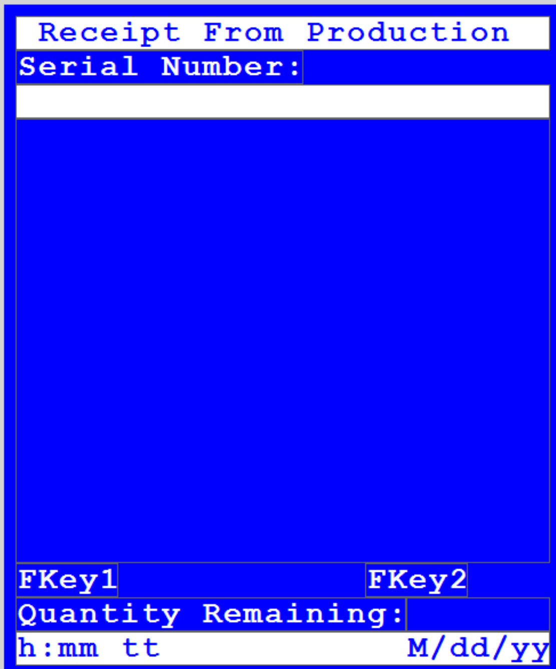
Batch Number – Key or scan the Batch Number. Pressing the F2 key will display a list of all batch numbers.

Quantity – Key or scan the batch quantity. If the quantity entered here equals the quantity entered on the first screen, the user will be returned to the warehouse prompt, else the user will be returned to the batch number field to enter another batch number and quantity, until enough batch quantity is entered for the item quantity.

Quantity Remaining – this will display the quantity that needs batch numbers provided.

FKey1 FKey2 – the user will be able to hit the function keys shown to edit the list of batch numbers scanned, and delete the batch number from the list if needed. Other function keys will be used for deletion and for completing.

If serial numbers are required



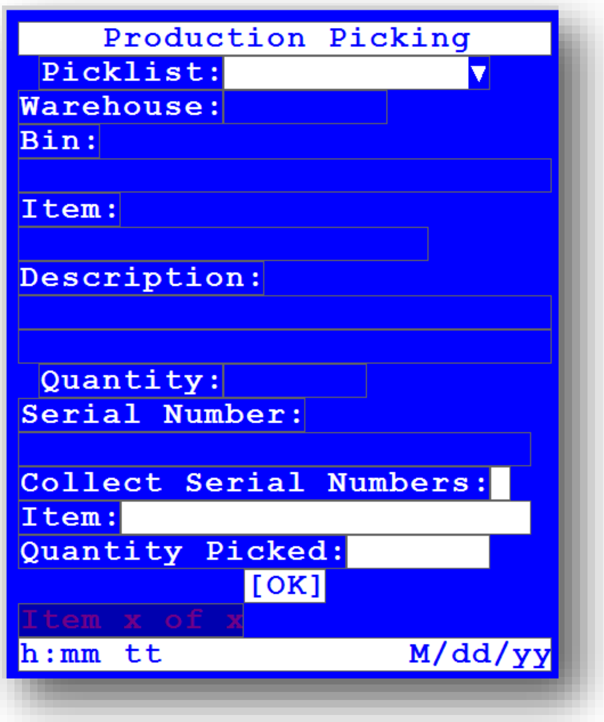
Serial Number – Key or scan the serial Number. Pressing the F2 key will display a list of all serial numbers. If the entered serial numbers equals the quantity entered on the first screen, the user will be returned to the warehouse prompt, else the user will be returned to the serial number field to enter another serial number, until enough serial numbers are entered for the item quantity.

Quantity Remaining – this will display the quantity that needs serial numbers provided.

FKey1 FKey2 – the user will be able to hit the function keys shown to edit the list of serial numbers scanned, and delete the serial number from the list if needed. Other function keys will be used for deletion and for completing.

Production Picking

The Production Picking transaction is used to directing users to pick components for jobs. Selecting Production Picking from the Production Menu will display the following screen:



Picklist - Key or scan the picklist. Pressing the F2 key will list of open picklist along with the customer and sales order the picklist is for.

Warehouse – Display only field of the warehouse the pick is to be from.

Bin – Display only field of the bin the pick is to be from.

Item – Display only field of the item to be picked.

Description – Display only field of the item description.

Quantity – Display only field of the quantity to be picked.

Serial Number – If the item is serial or batch controlled, and serial or batch numbers are pre-allocated for the picklist, this field will display the serial or batch number to be picked. Caption of this field will change based on item being batch or serial controlled

Collect Serial Number – If the item is serial or batch controlled, and serial or batch numbers are not pre-allocated, the user can enter Y or N for whether they are wanting to collect serial or batch numbers for the item being picked.

Item – User will key in or scan the item being picked. This value will need to match the item displayed above.

Quantity Picked – Key in or scan the quantity being picked. Value entered cannot exceed the quantity above. If the item is batch or serial controlled, the user will be taken to the batch or serial collection screen.

Item x of x – this will display to the user the total number of items on the picklist and where they are in the process of the pick.

OK – Hitting enter here will finish the transaction. If the item is not the last item on the picklist, the screen will display the next pick and the user will returned to the next entry field. If this is the last item for the picklist, the transaction will complete and a picklist transaction will be posted to SAP B1 for the items scanned for the request.

Pick Production Order

The Pick Production Order transaction is used to pick a production order picklist in any order. Selecting Pick Production Order from the Production Menu will display the following screen:

Picklist - Key or scan the picklist. Pressing the F2 key will list of open picklist along with the production order the picklist is for.

Item – User will have to press F2 to see a list of items on the picklist. List will show item along with quantity remaining to be picked for the item.

Description – Display only field of the item description.

From Warehouse – Display only field of the warehouse the pick is to be from.

From Bin – Display only field of the bin the pick is to be from.

Warehouse – Scan the warehouse to confirm what warehouse the pick is to be from. Value must match the value displayed in the from warehouse field.

Bin – Scan the bin to confirm what warehouse the pick is to be from. Value must match the value displayed in the from bin field.

Serial Number – If the item is serial or batch controlled, and serial or batch numbers are pre-allocated for the picklist, this field will display the serial or batch number to be picked. Caption of this field will change based on item being batch or serial controlled

Collect Serial Number – If the item is serial or batch controlled, and serial or batch numbers are not pre-allocated, the user can enter Y or N for whether they are wanting to collect serial or batch numbers for the item being picked.

Qty To Pick – Display value of the quantity left to pick for the entered item.

Quantity Picked – Key in or scan the quantity being picked. Value entered cannot exceed the quantity above. If the item is batch or serial controlled, the user will be taken to the batch or serial collection screen.

Last Item – If the item being picked is the last item, user will key in Y, else, if more items are to be picked, user will key in N.

OK – Hitting enter here will finish the transaction. If this is the last item for the picklist, the transaction will complete and a picklist transaction will be posted to SAP B1 for the items scanned for the request. If the user entered N for last item, they will return to the item prompt to pick another item.

Issue Production Picklist

The Issue Production Picklist transaction is used to do the issue for production for items picked on a production order picklist. Selecting Issue Production Picklist from the Production Menu will display the following screen:

Picklist - Key or scan the picklist. Pressing the F2 key will list of open picklist along with the production order the picklist is for.

Items Picked – User will be displayed a list of items picked on the entered picklist, along with the quantity picked.

OK – Hitting enter here will finish the transaction and issue the items in the list to the production order.

Miscellaneous Issue

The Miscellaneous Issue transaction is used to do the issue for production for items picked on a production order picklist. Selecting Issue Production Picklist from the Production Menu will display the following screen:

Order No – Key, scan or press F2 to get a list of production orders to issue to.

Item – Key or scan the item to be issued to the production order

Description – Display only field of the description of the part being issued.

Warehouse – Enter the warehouse the item is being issue from.

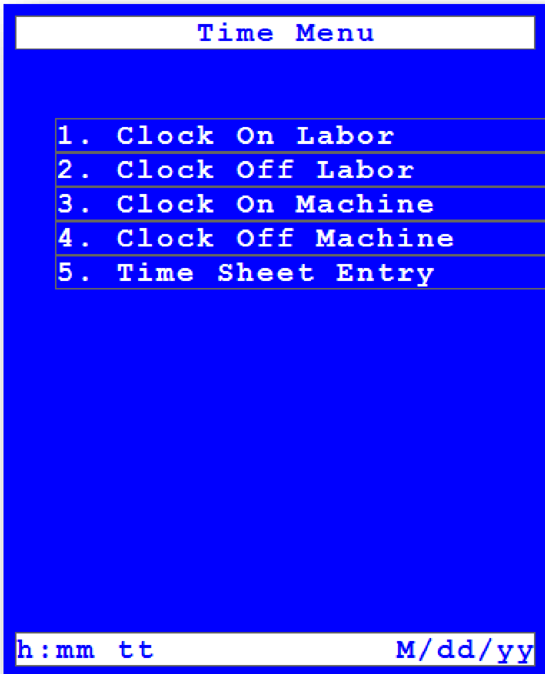
Bin – Enter the bin the item is being issue from, if the warehouse is bin controlled.

UOM – Display only field of the unit of measure of the inventory item.

OK – Hitting enter here will finish the transaction and the production order will be updated to have the new item as a line, and the issue of the item will be posted as well.

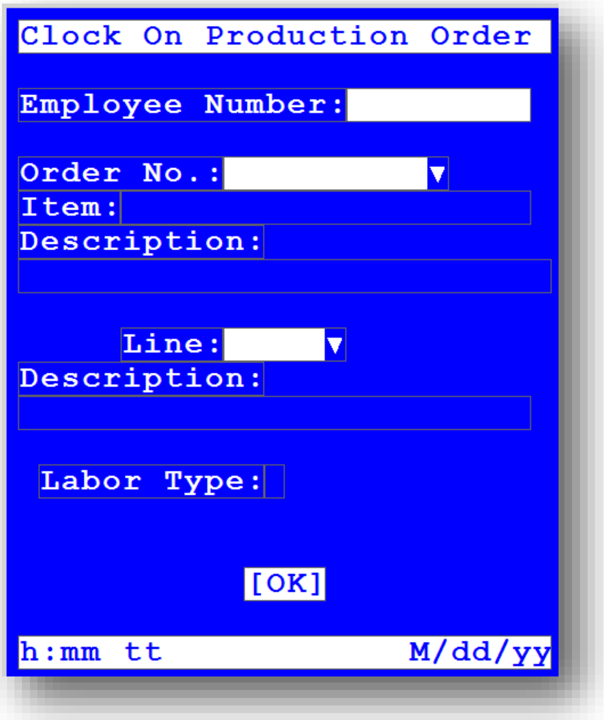
Time Menu

The Time Menu transaction is used to clock on and off jobs. Selecting Time Menu from the Production Menu will display the following menu:



Clock On Labor

The Clock On Labor transaction is used to clock an employee resource onto a production order to set a start time for recording production against the order. Selecting Clock On Job from the Time Menu will display the following screen:



Employee Number - Key or scan the employee number that is clocking onto the production order.

Order No. – User can key in or scan the production order number they are clocking onto. The user can also select a production order from the list by pressing the F2 key.

Item – Display only field that will show the item the production order is making.

Description – Display only field of the description of the item the production order is making.

Line – Key or scan the line number of the production order that is being clocked on. User can also press the F2 key and see a list of lines that are listed as labor resources on the production order.

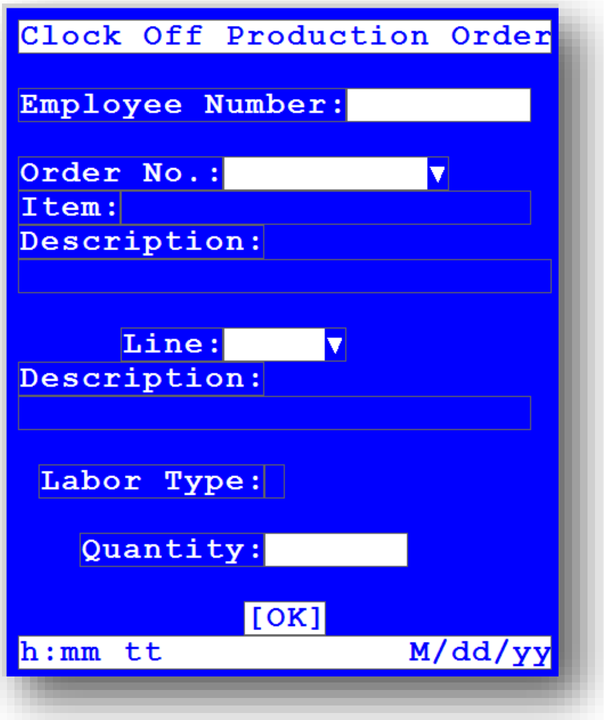
Description – Display only field of the description of the line of the production order.

Labor Type – If the user is not clocked onto any production orders this will be a display only field and will default to D for direct labor. If the user is on one or more production orders, this field will require entry and valid values will be P for parallel or S for serial. The difference is, when the user clocks off jobs, if they are clocked on parallel, the time on each job will be divided by number of production orders the user was clocked on. If they clock on serial, the time for the production orders clocked on will be allocated by the quantity produced for each production order.

OK – hitting enter will complete the transaction and write a record to a custom table with information about the start of the production order.

Clock Off Labor

The Clock Off Labor transaction is used to clock an employee resource off a production order and issue the time to the production order. Selecting Clock Off Job from the Time Menu will display the following screen:



Employee Number - Key or scan the employee number that is clocking off the production order. If the user is only on one production order, all field other than quantity will be defaulted to the values from the customer database for this employee. If multiple jobs are clocked on, user will be required to enter information about the production order they are clocking off of.

Order No. – User can key in or scan the production order number they are clocking off. Pressing the F2 key will display a list of production orders that the user is currently clocked onto.

Item – Display only field that will show the item the production order is making.

Description – Display only field of the description of the item the production order is making.

Line – Key or scan the line number of the production order that is being clocked off. User can also press the F2 key and see a list of lines that that the user is currently clocked onto.

Description – Display only field of the description of the line of the production order.

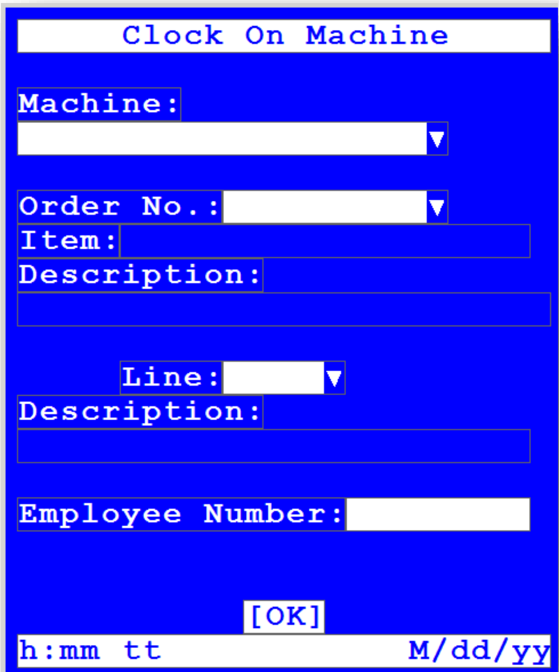
Labor Type – This field will be defaulted to the labor type field from the clock on record for the production order.

Quantity – User will key in the quantity of items for the production order that were completed.

OK – hitting enter will complete the transaction and issue the time elapsed from the start of the job to the current time to the production order line being clocked off of. The record in the custom clock on table will be transferred to a custom history table for custom reporting if desired.

Clock On Machine

The Clock On Machine transaction is used to clock a machine resource onto a production order to set a start time for recording production against the order. Selecting Clock On Machine from the Time Menu will display the following screen:



Machine - Key or scan the machine number that is clocking onto the production order. Pressing the F2 key will display a list of all machine resources.

Order No. –Key in or scan the production order number the machine is being clocked onto. Pressing the F2 key will display a list of production orders that require the indicated machine resource.

Item – Display only field that will show the item the production order is making.

Description – Display only field of the description of the item the production order is making.

Line – Key or scan the line number of the production order that is being clocked on. User can also press the F2 key and see a list of lines that are listed as machine resources on the production order.

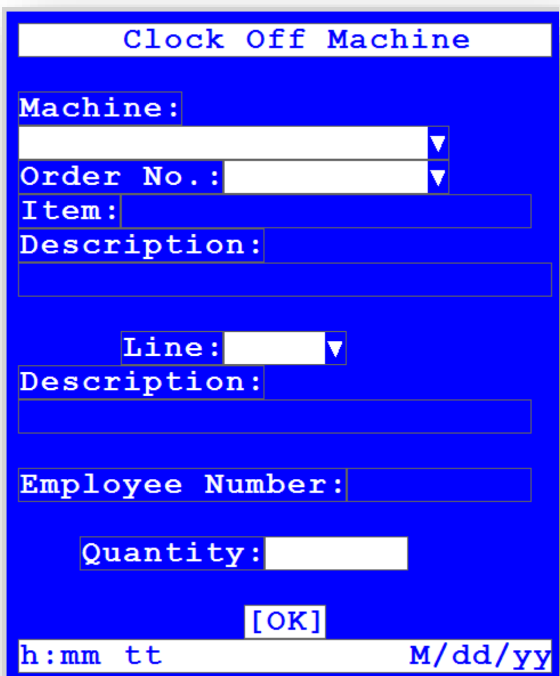
Description – Display only field of the description of the line of the production order.

Employee – If a specific user is monitoring the machine, they can enter their employee number in this field. This field is not required.

OK – hitting enter will complete the transaction and write a record to a custom table with information about the start of the production order for the machine.

Clock Off Machine

The Clock Off Machine transaction is used to clock a machine resource off a production order and issue the time to the production order. Selecting Clock Off Machine from the Time Menu will display the following screen:



Machine - Key or scan the machine number that is clocking off the production order. Pressing the F2 key will display a list of machines clocked onto production orders. All field other than quantity will be defaulted to values from the custom table.

Order No. – User can key in or scan the production order number they are clocking off. Pressing the F2 key will display a list of production orders that the user is currently clocked onto.

Item – Display only field that will show the item the production order is making.

Description – Display only field of the description of the item the production order is making.

Line – Key or scan the line number of the production order that is being clocked off. User can also press the F2 key and see a list of lines that that the user is currently clocked onto.

Description – Display only field of the description of the line of the production order.

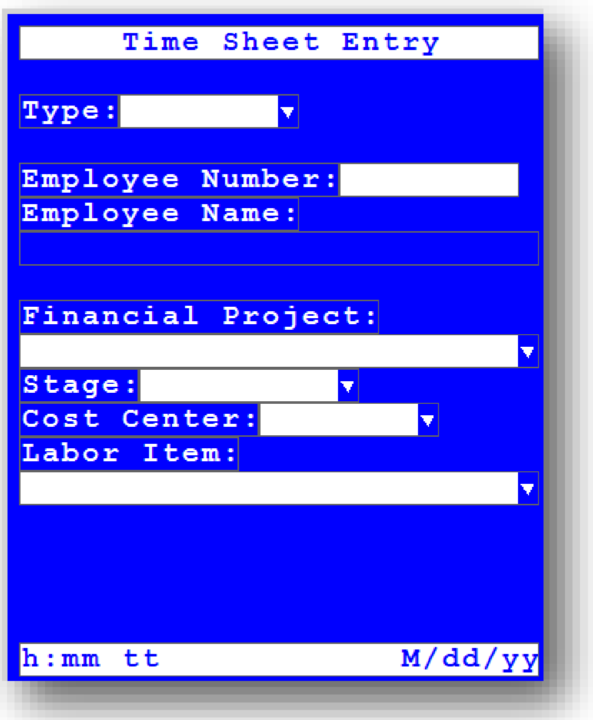
Employee – If a user was specified at machine clock on, that value will be displayed here.

Quantity – User will key in the quantity of items for the production order that were completed.

OK – hitting enter will complete the transaction and issue the time elapsed from the start of the job to the current time to the production order line being clocked off of. The record in the custom clock on table will be transferred to a custom history table for custom reporting if desired.

Time Sheet Entry

The Time Sheet Entry transaction is used to create time sheet records for users to log time to projects. Selecting Time Sheet Entry from the Time Menu will display the following screen:



Type - Pressing the F2 key will display a list of types of employees/users to enter time sheet data for.

Employee Number – If Type is User or Employee, user will enter either a User code or Employee number. If Type is Other, this field will be disabled.

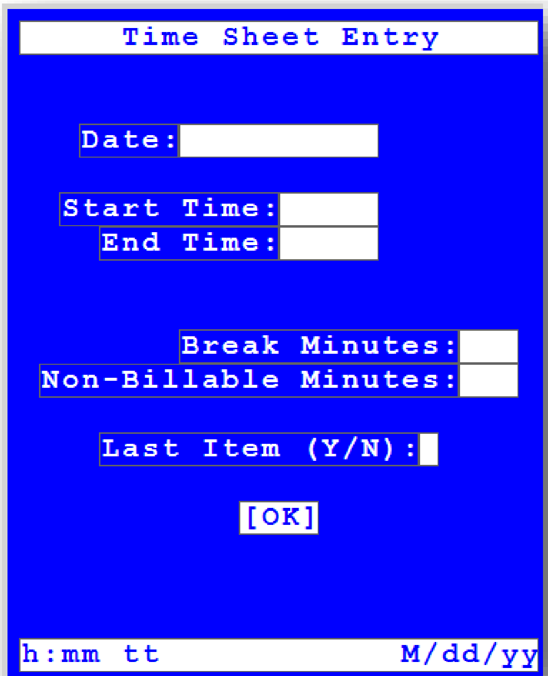
Employee Name - If Type is User or Employee, the name associated with that will be displayed, if Type is set to Other, a name will be entered.

Financial Project – Key in project ID for the time sheet. Pressing the F2 key will display a list of projects available.

Stage – If the project has stages, pressing F2 will display a list of stages for the project entered.

Cost Center – Pressing the F2 key will display a list of cost centers available.

Labor Item – Key in the Labor item being recorded. Pressing the F2 key will display a list of labor items available.



Stage – Field will default to current date but user can override with different date.

Start Time – Enter the start time for the entry, enter time in 24 hour format.

End Time – Enter the end time for the entry, enter time in 24 hour format.

Break Minutes – Enter the number of minutes of break time that was taken between the start and end times.

Non-Billable Minutes – Enter the number of minutes of non-billable time that was taken during the start and end times

Last Item – Enter Y or N for if this is the last entry being done for the employee/user entered. Field will default to N for no.

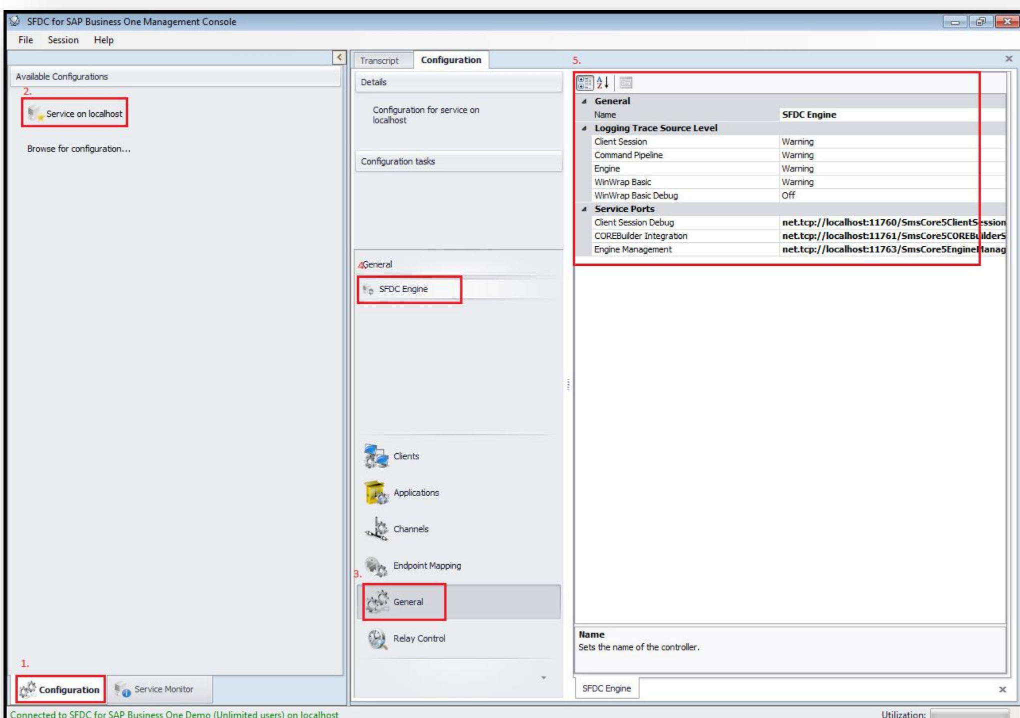
OK – Press enter on this field to enter the time sheet/time sheet line. If Last Item field is Y, all fields will clear for a different employee/user to enter time sheet data. If No is entered in Last Item Field, system will return to financial project field to enter time for the same employee/user for a different project and/or date and time.

SFDC for SAP Business One Management Console

This chapter details the various functions available within the SFDC for SAP Business One Management Console for administration of SFDC functionality. A shortcut to the Management Console is installed on the desktop of the SFDC server, but the application may also be installed elsewhere.

General Settings

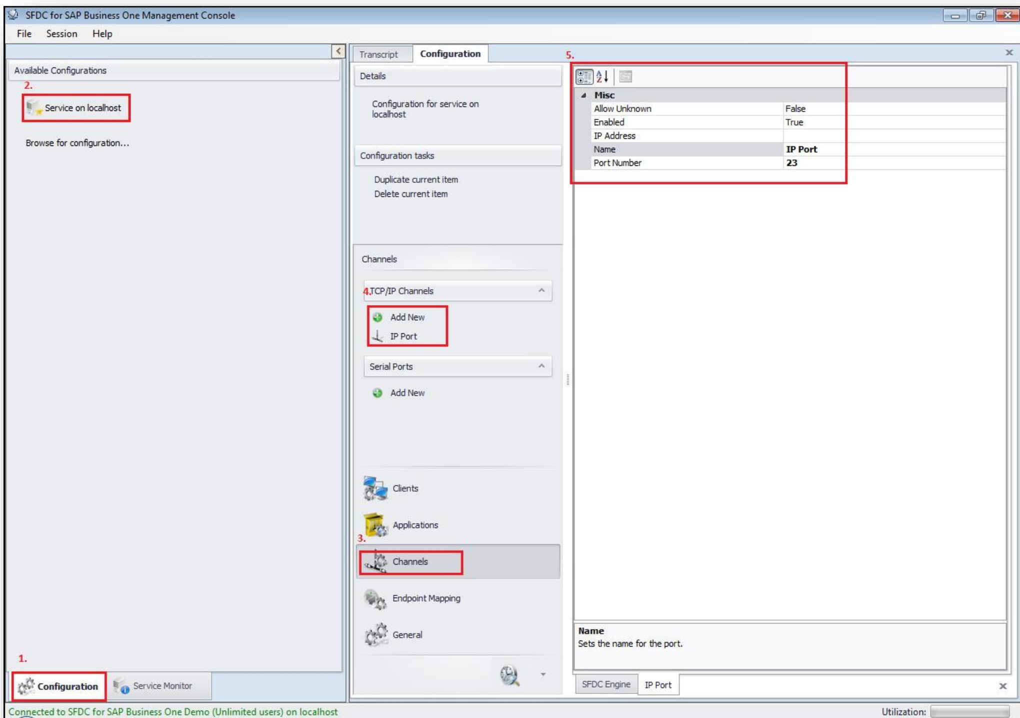
This program is used to maintain and manage system level attributes of SFDC. To manage and view these general settings, start the SFDC for SAP Business One Management Console and click on the Configuration tab in the lower left hand corner **(1.)**. Then click the 'Service on localhost' link in the Available Configurations panel **(2.)**. Choose the General tab in the lower middle of the screen **(3.)**, then select SFDC Engine **(4.)**. Shown below is the screen that will appear with the General settings shown in the upper right side panel **(5.)**.



These settings typically should not be changed. It is displayed here in the event a support event may require a support person to request an admin make a change, or reference a path. Generally even administrators will never need to access these settings.

Channels Settings

This program is used to maintain and manage communication Channels that SFDC uses for communicating with client devices. From here an administrator may manage the required Channels depending on the devices to be used. To manage Channels, start the SFDC for SAP Business One Management Console and click on the Configuration tab in the lower left hand corner **(1.)**. Then click the 'Service on localhost' link in the Available Configurations panel **(2.)**. Choose the Channels tab in the lower middle of the screen **(3.)**, then select a channel **(4.)**. Shown below is the screen that will appear with the Channels settings shown in the upper right side panel **(5.)**.



Upon installation, SFDC creates an IP Port channel. This channel is all that is necessary for most implementations. However, users using legacy serial equipment may need to create a Serial Port channel as needed.

Misc Section

Misc	
Allow Unknown	False
Enabled	True
IP Address	
Name	**IP Port**
Port Number	**23**

Allow Unknown - Controls if the port/channel will allow devices with unknown IP Addressed to connect. Click the field for a dropdown menu for selection of True or False.

Enabled - Controls if the port/channel is enabled. Click the field for a dropdown menu for selection of True or False.

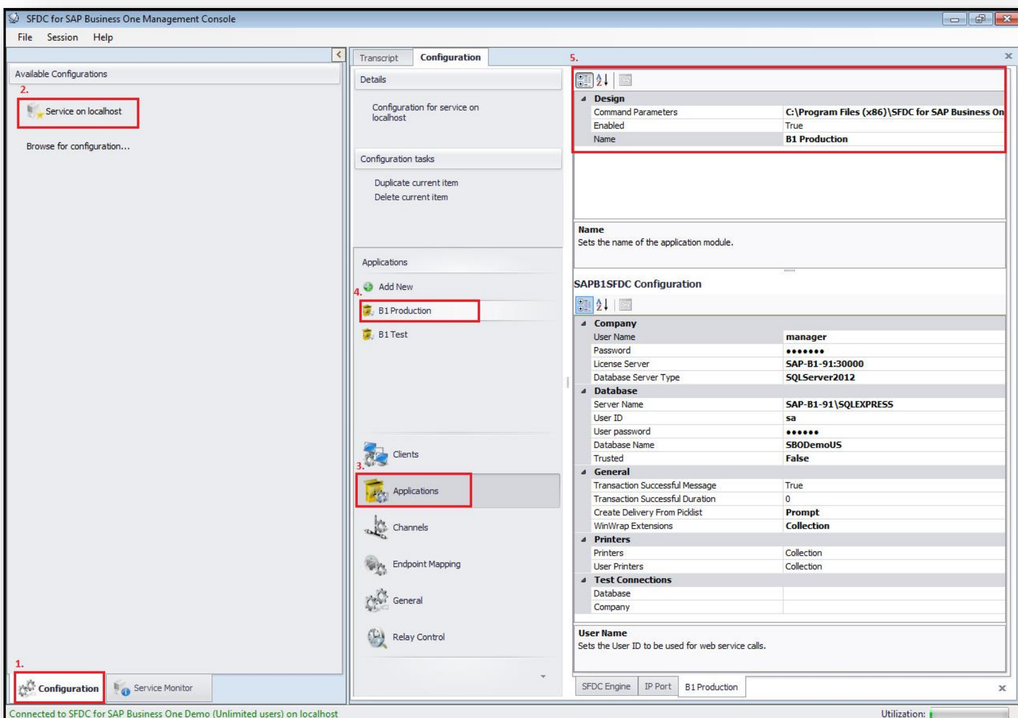
IP Address - Sets the IP Address for the port/channel, if applicable.

Name - Sets the name for the port/channel.

Port Number - Sets the port number for the port/channel.

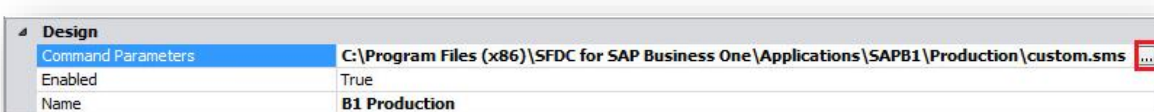
Applications Management: Design

This program is used to maintain and manage the Application Modules for SFDC. From here an administrator may manage the Design of the application modules as well as the configuration of the application modules. To manage the Design, start the SFDC for SAP Business One Management Console and click on the Configuration tab in the lower left hand corner **(1.)**. Then click the 'Service on localhost' link in the Available Configurations panel **(2.)**. Choose the Applications tab in the lower middle of the screen **(3.)**, then select an application **(4.)**. Shown below is the screen that will appear with the Design settings shown in the upper right side panel **(5.)**.



Upon installation, SFDC creates two Application modules: B1 Production, intended to be pointed at a production or "live" database, and B1 Test, intended to be pointed at a test or “development” database.. However, additional application modules may be created (via "Add New" option, see 4.) to handle specific device functionality, support of multiple SAP Business One database instances, etc.

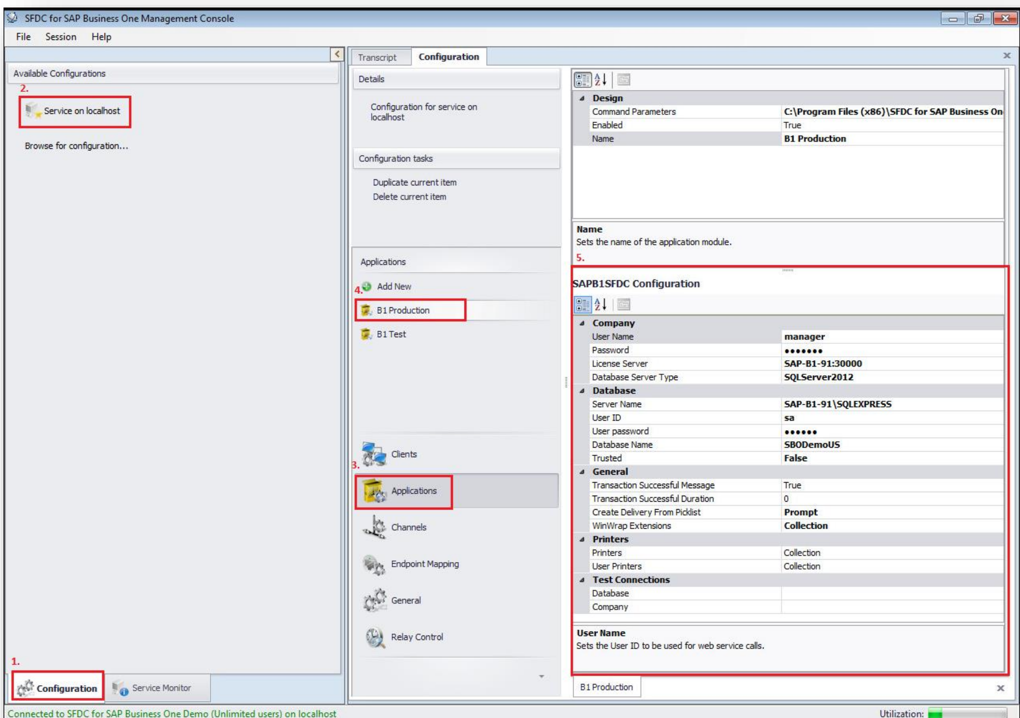
Design Settings



Command Parameters - Sets the command parameters for the application module. Press the button to browse to the project (.sms) file to be used with the indicated application module (usually custom.sms). The indicated path will be the folder containing all the files necessary for the application to function.
Enabled - True if application module should load upon starting of the SFDC for SAP Business One Server service.
Name - Sets the name of the application module.

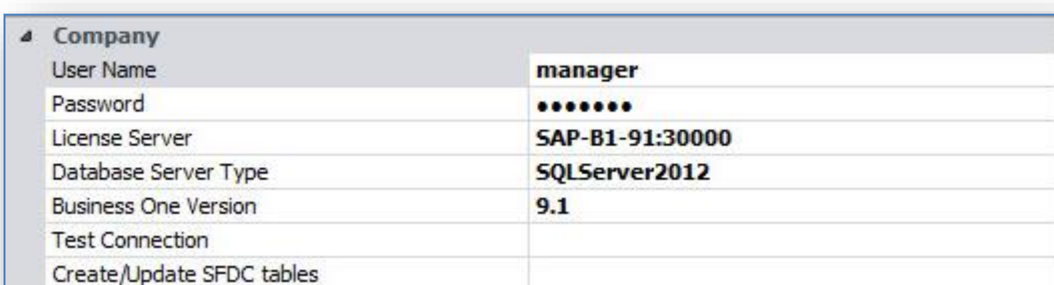
Applications Management: SFDC for SAP Business One Configuration

This program is used to maintain and manage the configuration settings for SFDC. Start the SFDC for SAP Business One Management Console and click on the Configuration tab in the lower left hand corner **(1.)**. Then click the 'Service on localhost' link in the Available Configurations panel **(2.)**. Choose the Applications tab in the lower middle of the screen **(3.)**, then select an application **(4.)**. Shown below is the screen that will appear with the configuration settings shown in the lower half of the right side panel **(5.)**. You may scroll the window up and down to see all of the options.



SAPB1SFDC Configuration Sections

Company



User Name - Enter the name of the user that SFDC will use to connect to the SAP Business One company.

Password - Enter the password for the User Name.

License Server – Enter the server name and port where the SAP Business One license server resides, in NAME:PORT format.

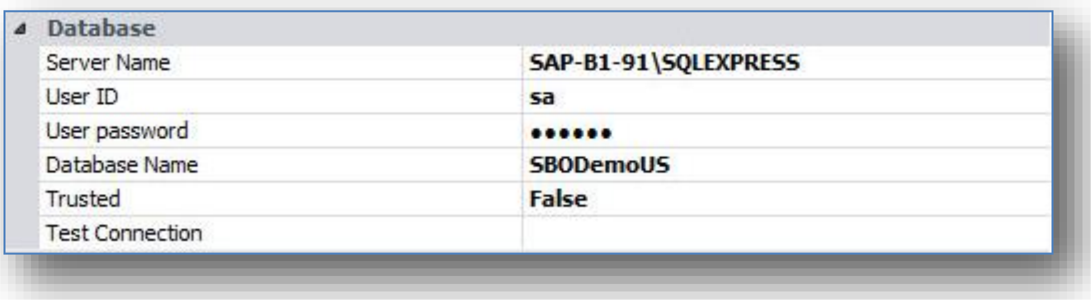
Database Server Type – Select from the list of options the database type that SAP Business One is using.

Business One Version – Enter the version of Business One.

Test Connection – Test the connection via the DIAPI to the SAP Business One company.

Create/Update SFDC Tables – Click the button on the right to update custom tables in the Business One database.

Database



Server Name - Enter the name of the SQL server where the SAP Business One database is located.

User ID - Enter the SQL Server User ID.

User Password - Enter the password for the User ID.

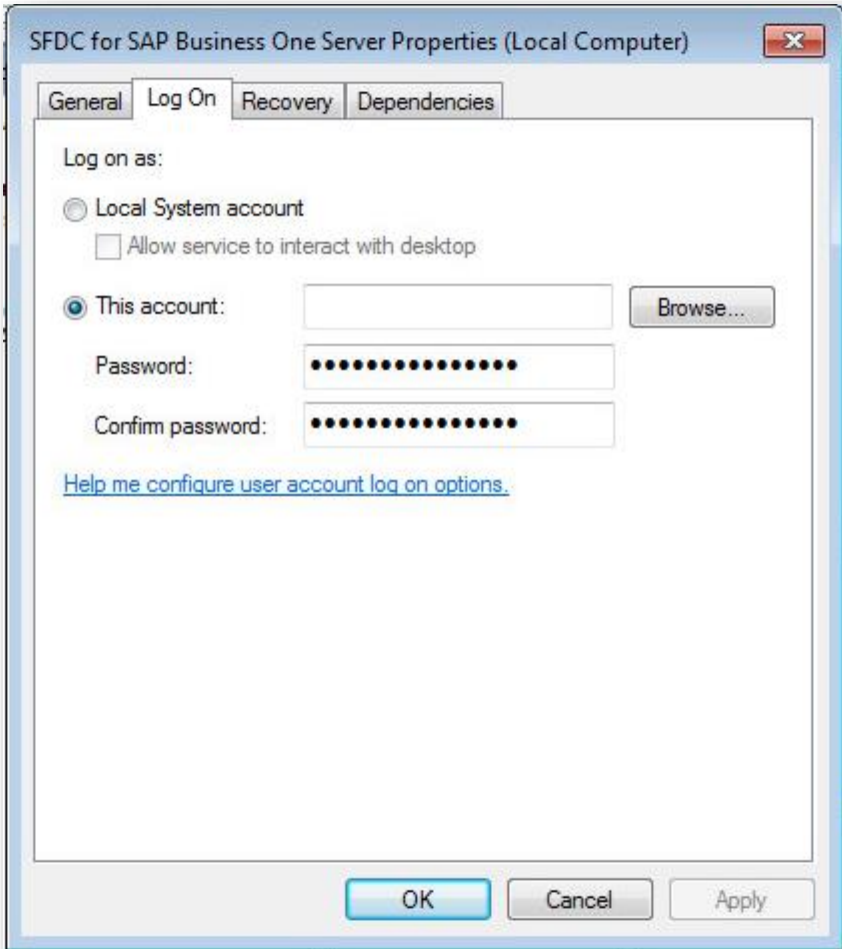
Database Name - Enter the name of the database.

Trusted – Sets the security type being used for the database connection.

Test Connection – Test the connection to the SAP Business One database.

Using Trusted Connection

If Trusted is set to True, to configure the login properly, go to Windows Services and find the SFDC for SAP Business One Server service. Right click on it and select properties, then the Log On Tab. Check the **This Account** radio button, and then provide a user name and password for a user that has sufficient rights to the SQL databases for SAP Business One, press OK and then restart the service.



General Section

General	
Transaction Successful Message	True
Transaction Successful Duration	0
Create Delivery From Picklist	Prompt
Over Reciept Error	False
Over Deliver Error	False
Batch Attribute Collection Configuration	
Goods Receipt PO Bin Defaulting Type	
GRPO Show Vendor Part In List	False
Cycle Count By Visual Order	False
Employee Lookup By Employee Code	False
Package Delivery Items	**True**
Good Receipt Price List	Last Purchase Price
Date Format	M/d/yyyy
WinWrap Extensions	**Collection**

Transaction Successful Message - True/False if system should display a message indicating the transaction just performed was successful upon transaction's completion.

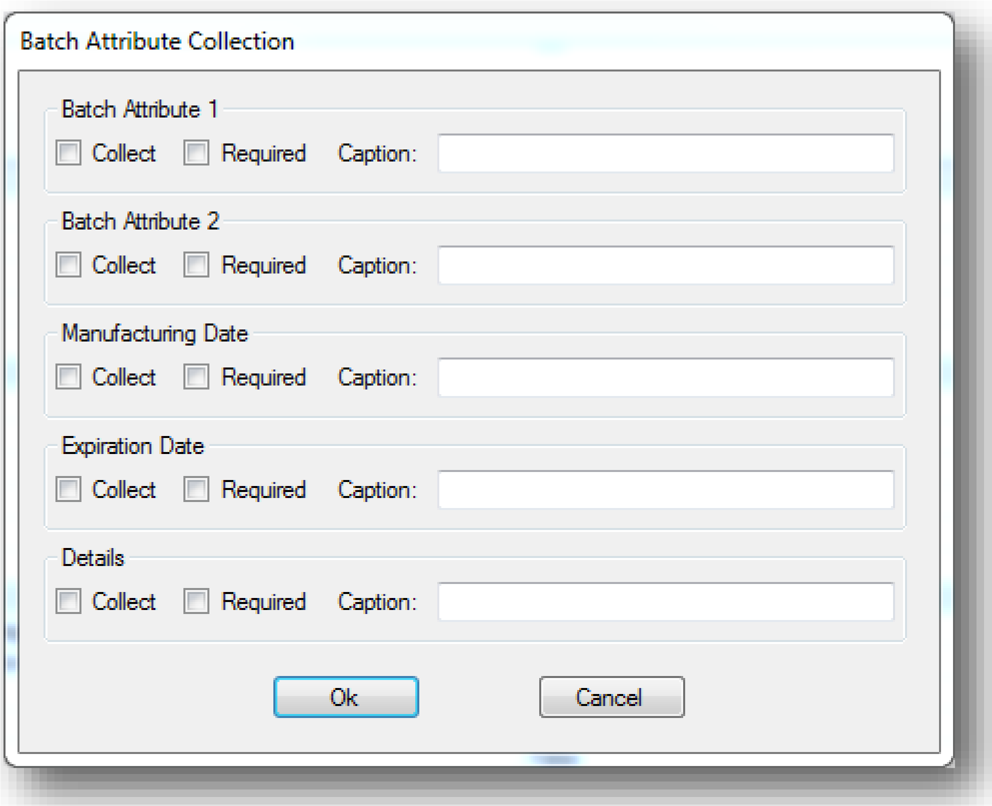
Transaction Successful Duration – Number of seconds the Transaction Successful message should display for the user. If 0, user must press F1 to clear message.

Create Delivery From Picklist – Specify whether or not deliveries are created after a picklist transaction. Available choices are "Never", where the delivery will not be created, "Prompt", where the user will be asked in the picklist transaction whether or not they want to create the delivery, or "Always", where the delivery will always be created after the picklist is completed.

Over Receipt Error – Specify whether an error or a message is displayed if the user tried to receive more than the indicated quantity on the Purchase Order.

Over Deliver Error – Specify whether an error or a message is displayed if the user tried to deliver more than the indicated quantity on the Sales Order.

Batch Attribute Collection Configuration - This option will display the form shown below to control what batch attributes are collected on Goods Receipt, Goods Receipt PO and Receipt from Production.



Goods Receipt PO Bin Defaulting Type - This option allows setting the default bin for items received through Goods Receipt PO to be either no default, default to item default bin, or default to the last received bin for that item.

GRPO Show Vendor Part In List - This option allows for the optional showing of the vendor part number in the item choice list in goods receipt PO.

Cycle Count By Visual Order - This option cycle count transaction to display items in the order they are seen in the Cycle Count screen in B1, instead of Bin order.

Employee Lookup By Employee Code – determines whether employee lookup is done by employee code or employee number.

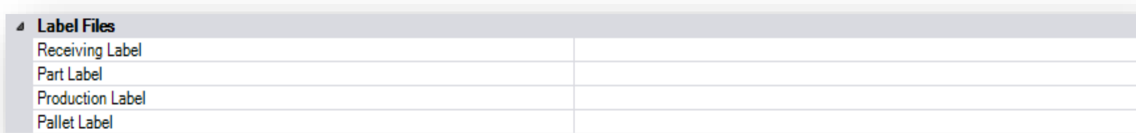
Package Delivery Items – Determines whether a prompt will display during the sales delivery transaction to have the user indicate the package number and type the item being deliver is going into, for updating the pack slip of the delivery.

Goods receipt Price List – determines what price list the price of an item being received in the goods receipt transaction will pull from.

Date Format - This option allows the customization of the date format displayed in SFDC.

WinWrap Extensions - This should only be changed at the direction of SFDC support.

Label Files Section



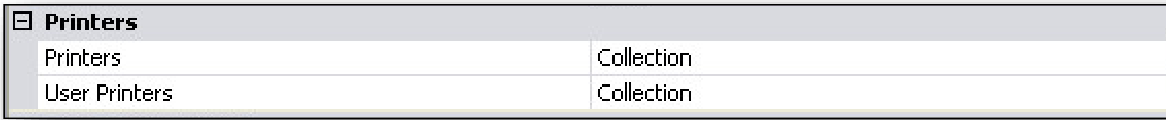
Receiving Label – Valid path to the receiving label file used for SFDC. A button will appear on the right side. Click the button to select the label file. If a value is specified, user will be prompted after each item in the Goods Receipt PO transaction to print a label.

Part Label – Valid path to the part label file used for SFDC. A button will appear on the right side. Click the button to select the label file. If a value is specified, the user can optionally print a label in the Inventory Inquiry transaction.

Production Label – Valid path to the production label file used for SFDC. A button will appear on the right side. Click the button to select the label file. If a value is specified, user will be prompted after each item in the Receipt From Production transaction to print a label.

Pallet Label – Valid path to the pallet label file used for SFDC. A button will appear on the right side. Click the button to select the label file. A label needs to be set to allow use of the pallet transcations.

Printers Section

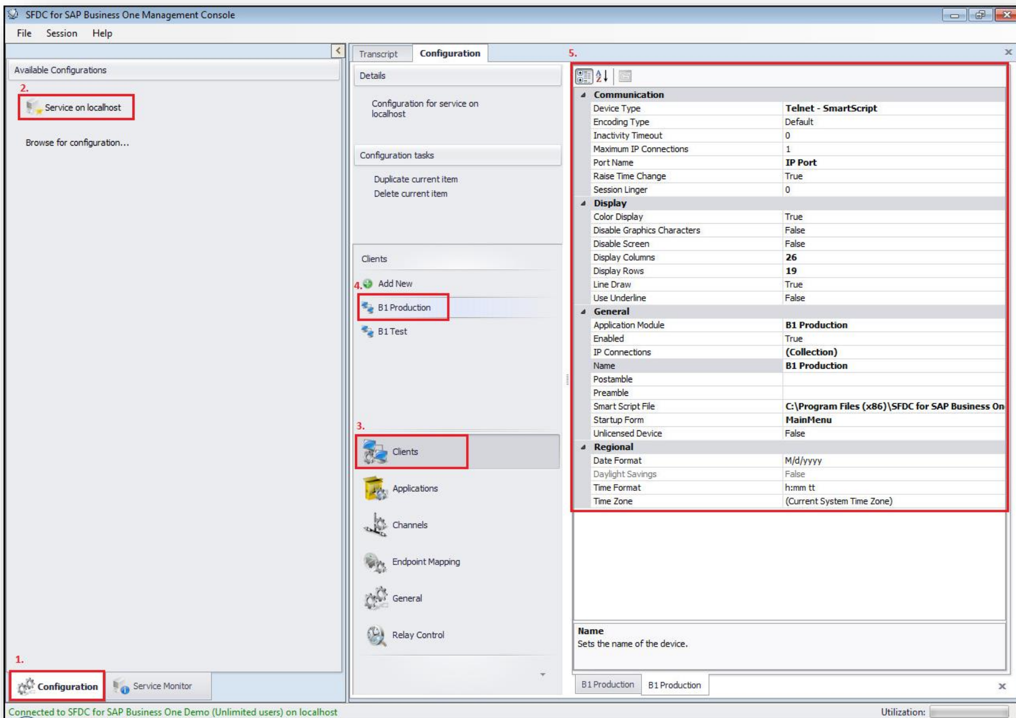


Printers - Select this line to define printers to be used when printing labels from SFDC. Once selected, a button will appear on the right side. Click the button to bring up the screen to define printers.

User Printers - Select this line to assign printers to users or devices when printing labels from SFDC. Once selected, a button will appear on the right side. Click the button to bring up the screen to define user printers.

Clients Management

This program is used to maintain and manage the SFDC Clients. From here an administrator may manage the individual clients (aka "devices") and which application modules they use to collect data. To manage the Clients, start the SFDC for SAP Business One Management Console and click on the Configuration tab in the lower left hand corner **(1.)**. Then click the 'Service on localhost' link in the Available Configurations panel **(2.)**. Choose the Clients tab in the lower middle of the screen **(3.)**, then select a client **(4.)**. Shown below is the screen that will appear with the client settings shown in the upper right side panel **(5.)**.



Upon installation, SFDC creates two Clients: B1 Production and B1 Test. Both are a simple telnet client pointed to the respective B1 Production and B1 Test application modules set up by default. However, additional Clients may be created (via "Add New" option, see 4.) to handle configuration of device types which do not operate as a telnet client, have different screen configurations, etc. A list of common devices and their configurations is included in the final chapter of this manual.

Communication Section

Communication	
Device Type	**Telnet - SmartScript**
Encoding Type	Default
Inactivity Timeout	0
Maximum IP Connections	1
Port Name	**IP Port**
Raise Time Change	True
Session Linger	0

Device Type - Sets the type of the client device. Click the field for a dropdown menu for selection of available device options.

Encoding Type - Sets the encoding type for the client device. Click the field for a dropdown menu for selection of available encoding options.

Inactivity Timeout - Sets the inactivity period for the device before automatic reset, in seconds.

Maximum IP Connections - Controls the maximum number of concurrent connections from the client device (IP address). Typically used in Terminal Server environments.

Port Name - Sets the port name for the client device. Click the field for a dropdown menu for selection of available port options.

Raise Time Change - Controls if the raise time change event is set for the device. Click the field for a dropdown menu for selection of True or False.

Session Linger - Sets the time the session remains active for the device.

Display Section

Display	
Color Display	True
Disable Graphics Characters	False
Display Columns	**26**
Display Rows	**19**
Line Draw	True
Use Underline	False

Color Display - Controls if the client device supports color. Click the field for a dropdown menu for selection of True or False.

Disable Graphics Characters - Disables graphic characters for the client device. Click the field for a dropdown menu for selection of True or False.

Display Columns - Sets the number of display columns (horizontal) for the client device.

Display Rows - Sets the number of display rows (vertical) for the client device.

Line Draw - Controls if the client device supports line draw characters. Click the field for a dropdown menu for selection of True or False.

Use Underline - Sets the client device to underline mode. Click the field for a dropdown menu for selection of True or False.

General Section

General	
Application Module	**B1 Production**
Enabled	True
IP Connections	**(Collection)**
Name	**B1 Production**
Postamble	
Preamble	
Smart Script File	**C:\Program Files (x86)\SFDC for SAP Business One\Applications\SAPB1\Production\custom.sms**
Startup Form	**MainMenu**
Unlicensed Device	False

Application Module - Sets the application module for the client device. Click the field for a dropdown menu for selection of available application module options.

Enabled - Controls if the client device is enabled. Click the field for a dropdown menu for selection of True or False.

IP Connections - Sets the IP addresses that will use the client device. Press the button to browse to bring up the Collection Editor that allows you to set individual IP addresses, or a range.

Name - Sets the name of the device.

Postamble - Sets the postamble for the device, if applicable.

Preamble - Sets the preamble for the device, if applicable.

Smart Script File - Sets the smart script file location for the client device. Press the button to browse to the project (.sms) file to be used with the indicated client device (usually custom.sms). The indicated path will be the folder containing all the files necessary for the application to function.

Startup Form - Sets the startup form/screen for the client device, if desired. Click the field for a dropdown menu for selection of available startup form/screen options.

Unlicensed Device - Controls if the device is unlicensed.

Regional Section

Regional	
Date Format	M/d/yyyy
Daylight Savings	False
Time Format	h:mm tt
Time Zone	(Current System Time Zone)

Date Format - Sets the date format for the client device. Press the button to bring up screen to configure the format as it should be handled by the client.

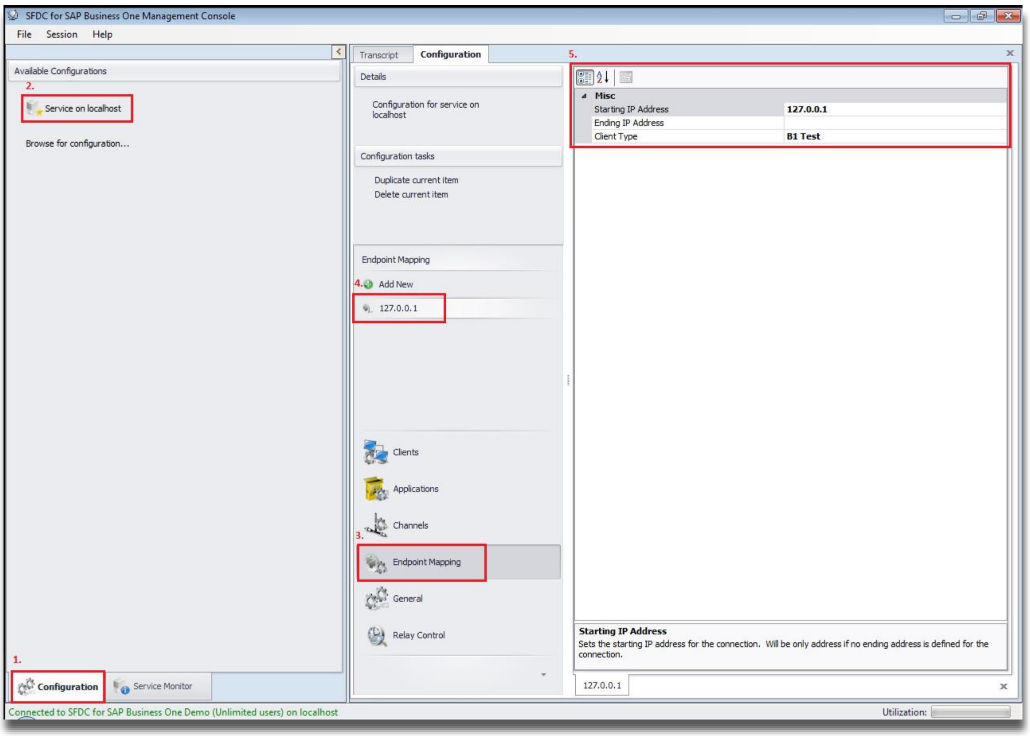
Daylight Settings - Displays whether or not the time zone the device is operating in uses daylight savings time.

Time Format - Sets the time format for the client device. Press the button to bring up screen to configure the format as it should be handled by the client.

Time Zone - Sets the time zone for the client device. Press the button to bring up screen to select available options.

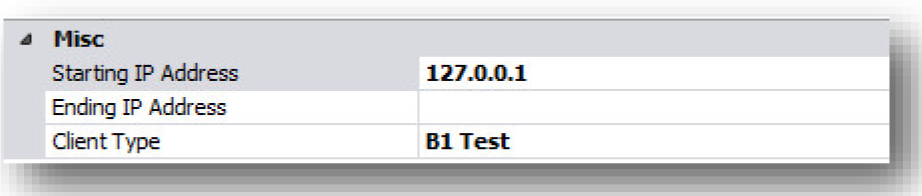
Endpoint Mapping

This program is used to maintain and manage IP addressed and their associated SFDC Clients/Devices. From here an administrator may associate IP addresses, or ranges of IP addresses, to specific clients. To manage Endpoint Mapping, start the SFDC for SAP Business One Management Console and click on the Configuration tab in the lower left hand corner **(1.)**. Then click the 'Service on localhost' link in the Available Configurations panel **(2.)**. Choose the Endpoint Mapping icon in the lower middle of the screen **(3.)**, then select an address (or add a new one) **(4.)**. Shown below is the screen that will appear with the settings shown in the upper right side panel **(5.)**.



Upon installation, SFDC creates one address, that of the local host. It will be necessary for additional addresses to be added based on the devices to be used.

Misc Section



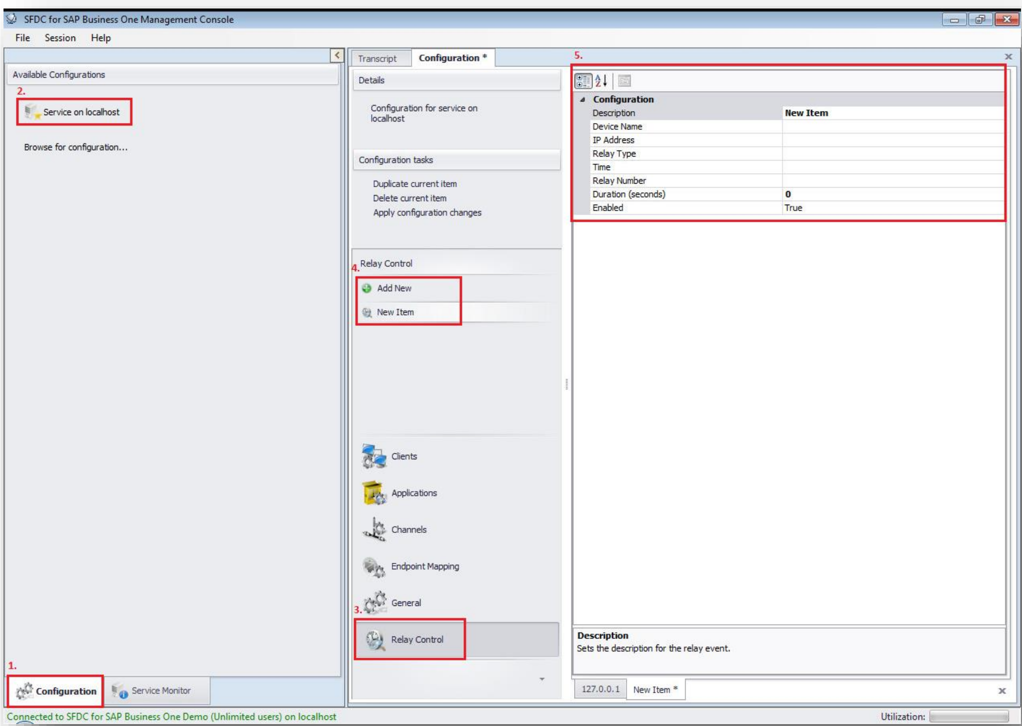
Starting IP Address - Sets the starting IP address for the connection. Will be only address if no ending address is defined for the connection.

Ending IP Address - Sets the ending IP address for the connection. Used only if defining a range of connection addresses.

Client Type - Sets the client/device type for the IP Connection. Click the field for a dropdown menu for selection of available client/device options.

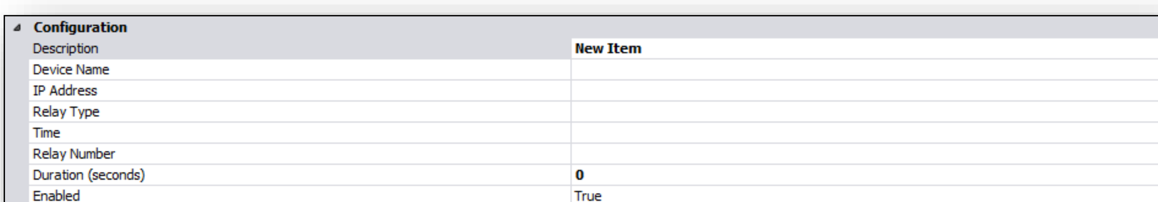
Relay Control

This program is used to maintain and manage relay devices that will be fired by SFDC. To manage Relay Control, start the SFDC for SAP Business One Management Console and click on the Configuration tab in the lower left hand corner **(1.)**. Then click the 'Service on localhost' link in the Available Configurations panel **(2.)**. Choose the Relay Control icon in the lower middle of the screen **(3.)**, then select Add New **(4.)**. Shown below is the screen that will appear with the Configuration settings shown in the upper right side panel **(5.)**.



Upon installation, SFDC does not create any relay devices, so any device containing a relay that you would like SFDC to fire will need set up by the administrator.

Configuration Section



Configuration	
Description	New Item
Device Name	
IP Address	
Relay Type	
Time	
Relay Number	
Duration (seconds)	0
Enabled	True

Description - Sets the description for the relay event.

Device Name - Sets the client/device where the relay is located, if applicable. Click the field for a dropdown menu for selection of available client/device options.

IP Address - Sets the IP address for the client/device.

Relay Type - Sets the type of relay. Click the field for a dropdown menu for selection of available options.

Time - Sets the time for the relay to be fired. Format is 24 hour clock (HH:MM).

Relay Number - Sets the relay number on the end device to be used.

Duration (seconds) - Sets the duration the relay will sound.

Enabled - Controls if the relay event is enabled. Click the field for a dropdown menu for selection of True or False.

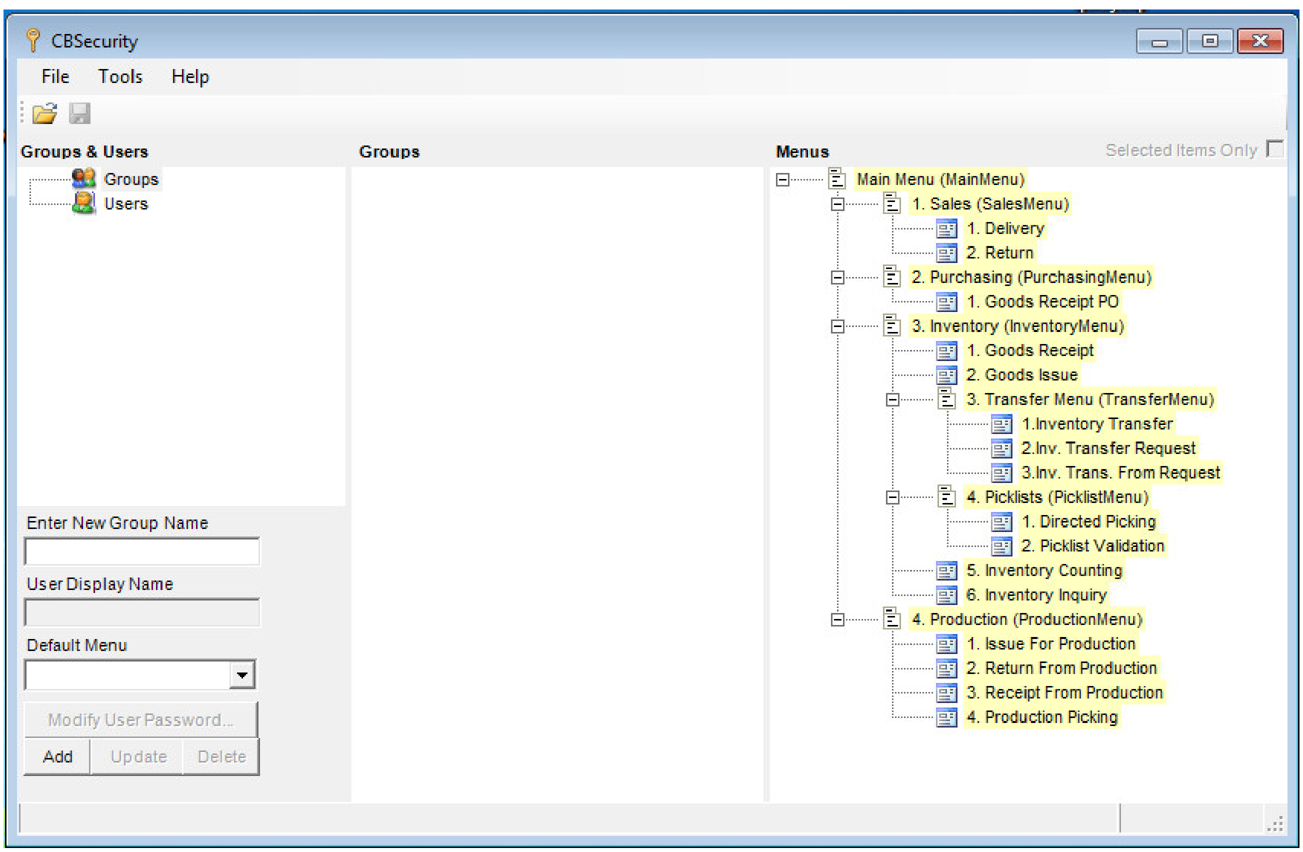
SFDC Security

What is SFDC Security?

The SFDC Security program gives an Administrator the ability to set permissions on menus and menu items by restricting access to only selected groups and users. It also allows for the password protecting menus and menu items.

SFDC Security Interface

As soon as the SFDC Security window loads (accessed via the shortcut that installs on the desktop, or from the Programs menu) you will see four separate window panes. The first pane, labeled Groups & Users, will have a node for each group and user defined within the current smart script file. The second pane, labeled Groups or labeled Users, will contain a node for each user defined when a group is selected in the Groups & Users pane or a node for each group defined when a user is selected in the Groups & Users pane. If the node is checked, it indicates that the checked user is a member of the selected group. The third pane, labeled Menus, will have a node for each menu and screen defined. If the node is checked, it indicates that the selected group or user has permission to the checked menu item. The fourth pane, no label, is below the Groups & Users pane and is used for maintaining groups and users.



MenuBar

File: Allows for the opening and saving of an SMS Smart Script file and for exiting the program.

Tools: Allows for the importing and exporting of security information.

Help: Access to help file.

ToolBar

Open: Allows for the opening of an SMS Smart Script file.

Save: Allows for the saving of an SMS Smart Script file.

Pop-Up Menus (right click on the pane to display the menu)

Groups or Users pane

Check All checks all of the groups.

Uncheck All un-checks all of the groups or users.

Menus pane

Check All checks all of the menu items giving the selected group or user access to all menu items.

Uncheck All un-checks all of the menu items removing the selected group or user access to all menu items.

Expand All expands all of the menu items in the menu tree.

Collapse All collapses all of the menu items in the menu tree.

Modify Password… displays change password form for setting a password on a menu item.

See ***Modifying a Menu Item Password***

Color Coding in Menus pane

Menu tree fore color green = security via group membership.

Menu tree fore color blue = security via user name.

Menu tree back color white = menu item built from custom script file.

Menu tree back color yellow = menu item built from include file.

Groups

Adding a New Group

Select Groups from the Groups & Users pane.

Enter the name of the group in the Group Name field.

Click the Add button.

Modifying Group Information

Select the group you want to modify from the **Groups & Users** pane.

Enter the updated **Group Name**.

Click the **Update** button.

Deleting a Group

Select the group you want to delete from the **Groups & Users** pane.

Click the **Delete** button.

This will remove the selected group or user from access to all menu items.

Users

Adding a New User

Select Users from the Groups & Users pane.

Enter the id of the user in the User Id field.

Enter the display name of the user in the User Display Name field.

Select the default menu for the user from the User Default Menu dropdown list.

Click the Add button.

The **User Display** Name and **User Default Menu** fields are optional. The initial password for a new user is the same as the **User Id**. To change the user's password see ***Modifying a User Password***

Modifying User Information

Select the user you want to modify from the **Groups & Users** pane.

Enter the updated **User Id**, **User Display Name** and/or **User Default Menu**.

Click the **Update** button.

Modifying a User Password

Select the user whose password you want to modify from the **Groups & Users** pane.

Click the **Modify User Password…** button.

(Change Password screen will be displayed)

Enter the old password in the **Old Password** field.

Enter the new password in both the **New Password** and **Confirm Password** fields.

Click the **Accept** button.

Deleting a User

Select the user you want to delete from the **Groups & Users** pane.

Click the **Delete** button.

Note This will remove the selected user from access to all menu items.

Adding a User to a Group

Select the user you want to add from a group in the **Groups & Users** pane.

Check the check box for the group you want to add the user to in the **Groups** pane.

Or

Select the group you want to add the user to from the **Groups & Users** pane.

Check the check box for the user you want to add to the group in the **Users** pane.

Removing a User from a Group

Select the user you want to remove from a group in the Groups & Users pane.

Uncheck the check box for the group you want to add the user to in the Groups pane.

Or

Select the group you want to add the user to from the Groups & Users pane.

Uncheck the check box for the user you want to remove from the group in the Users pane.

Menus

Granting Access to a Group or User

Select the group or user you want to add to or remove from a menu item in the **Groups & Users** pane.

2Check the check box for the menu item you want to add the group or user to in the **Menus** pane. Selected group or user will now have access to the checked menu item.

Removing Access to a Group or User

Select the group or user you want to add to or remove from a menu item in the **Groups & Users** pane.

Un-check the check box for the menu item you want to remove the group or user to in the **Menus** pane. Selected group or user will be unable to access the unchecked menu item.

Modifying a Menu Item Password

Right-click on the menu item from the **Menus** pane.

Select **Modify Menu Password…** from the menu.

(Change Password screen will be displayed)

Enter the old password in the **Old Password** field.

Enter the new password in both the **New Password** and **Confirm Password** fields.

Click the **Accept** button.

Tools

Importing Security Information

From the MenuBar, select **Tools | Import** and then select the security information you want to import.

Groups and Users imports only groups and users.

Menu Rights imports only the menu rights of groups and users.

All Security Info imports both Groups and Users and Menu Rights.

Select a sms script file or a previously exported security file from which to import the security information from. The security information from the selected script will then be merged into the currently opened script.

The import only adds information and will not modify or remove existing information contained in the script.

Exporting Security Information

From the MenuBar, select **Tools | Export** and then select the security information you want to export.

Groups and Users exports only groups and users.

Menu Rights exports only the menu rights of groups and users.

All Security Info exports both Groups and Users and Menu Rights.

Select a file for which to export the security information to. The security information from the selected script will then be exported.

The export will not modify or remove information in the currently opened script.

Device Configuration

Devices are an ever changing component of SFDC for SAP Business One as existing hardware technologies evolve, current devices upgrade, new devices are added, etc. What follows are configurations for common devices.

Computerwise Configuration

ET-xxx Network Settings

Network Setup Screen

To enter the Network Setup on the ET215 devices, press and hold down the red S1 and blue S2 keys, and then press the F1 key. This will display the Network Setup screen.

Two options are displayed:

Defaults - This will set the network settings back the factory defaults

Modify - This will allow you to view/modify the current network settings

Configure Network Settings

From Network Setup Screen, press 2 to view or modify the current settings. To move from setting to setting, use the Enter key. Do NOT use the F7/Accept key.

The following is a list of the settings and their values::

My_IP - This will be the assigned IP address for the device

Netmask - This will be the IP address of the network mask

Gateway - This will be the IP address of the gateway

HostName - This can be any descriptive name for the Host PC (i.e. SFDC server)

Server - This will be the IP address of the SFDC server

TCPPort - This is the IP Port of the CORE server. The required value is 23.

AUXPort - This will be the setting for the serial port. The default value is 9600, 0, 8, 1, 1

Mode - The Mode needs to be set to 2

Once the settings are specified, the device will return the main screen for the Network setup. Press the Enter key again to be prompted to reset the device. (i.e. Reset (7 = Yes)).

Press the 7 key to reset the device. If none of the settings were modified, you will not be prompted to reset the device.

Specific Device Configuration

The following table defines several common devices as they should be detailed in the Clients configuration of the SFDC for SAP Business One Management Console program:

	SMS Telnet	Computerwise ET314	Computerwise ET315	Mobile Client	Motorola 9000 series	Intermec CK series
Communication						
Device Type	Telnet-SmartScript	Computerwise Ethernet Terminal	Computerwise Ethernet Terminal	Mobile Client	Telnet-SmartScript	Telnet-SmartScript
Encoding Type	Default	Default	Default	UTF8	Default	Default
Inactivity Timeout	0	0	0	0	0	0
Max IP Connections	1	1	1	1	1	1
Port Name	IP Port	IP Port	IP Port	IP Port	IP Port	IP Port
Raise Time Change	TRUE	FALSE	FALSE	TRUE	TRUE	TRUE
Session Linger	0	0	0	0	0	0
Display						
Color Display	TRUE	FALSE	FALSE	TRUE	TRUE	TRUE
Disable Graphic Chrs.	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE
Display Columns	26	24	24	26	26	26
Display Rows	19	8	2	19	19	19
Line Draw	TRUE	FALSE	FALSE	TRUE	TRUE	TRUE
Use Underline	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE
General						
App Module	*	*	*	*	*	*
Enabled	TRUE	TRUE	TRUE	TRUE	TRUE	TRUE
IP Connections	*	*	*	*	*	*
Name	*	*	*	*	*	*
Postamble						
Preamble						
Smart Script File	*	*	*	*	*	*
Startup Form	*	*	*	*	*	*
Unlicensed Device	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE
Regional						
Date Format	*	*	*	*	*	*
Daylight Savings	*	*	*	*	*	*
Time Format	*	*	*	*	*	*
Time Zone	*	*	*	*	*	*