



15 Minute Tip Talk – March 15, 2018 Turn Sales Orders Into Purchasing Docs

Available Starting SAP Business One 9.1

Background

Organizations often employ different strategies for managing inventory. Some purchase goods so that they are delivered just as they are needed to meet customer demand. This way, purchases are often planned when customer orders are received. To optimize inventory control, SAP Business One offers the option to open the Procurement Confirmation Wizard upon adding a Sales Order and create a respective procurement document.

Procurement Options in the Sales Order

The Logistics tab of the Sales Order offers you options to procure documents for lines related to drop-ship warehouses, lines related to non drop-ship warehouses, or both.

The screenshot shows the SAP Sales Order window with the Logistics tab selected. The window title is "Sales Order". The Customer field is set to "C30000" (MICROCHIPS) and the Contact Person is "Judy Brown". The BP Currency is "\$". The No. is "Primary" and "431", Status is "Open", Posting Date is "03/27/2018", and Document Date is "03/27/2018".

The Logistics tab is active, showing the following options:

- Print Picking Sheet
- Language: English
- Proc. Doc. For Non Drop-Ship Whse Lines
- Proc. Doc. For Drop-Ship Whse Lines
- Approved
- Allow Partial Delivery

Other fields in the Logistics tab include:

- Ship To: 1618 James St, Fairport NY 14450, USA
- Bill To: [Empty]
- Shipping Type: UPS Red
- Pick and Pack Remarks: [Empty]
- BP Channel Name: [Empty]
- BP Channel Contact: [Empty]

Upon adding the document, the system will display the Procurement Generation Wizard.

Sales Order

Customer: C30000 No. Primary: 431
 Name: MICROCHIPS Status: Open
 Contact Person: Judy Brown Posting Date: 03/27/2018
 Customer Ref. No.: Delivery Date: 03/28/2018
 BP Currency: \$ Document Date: 03/27/2018

Contents Logistics Accounting Attachments

Item/Service Type	Item	Item Description	Quantity	Whse
1	A00001	J.B. Officeprint 14205	10	01
2				

Sales Employee: Bill Levine Owner: Total Before Discount: 4,000.00 \$
 Discount: % Freight: Rounding: 0.00 \$
 Tax: 330.00 \$ Total: 4,330.00 \$

Remarks: 555-0103

Add Cancel Copy From Copy To

Sales Order

Customer: No. Primary: 432
 Name: Status: Open
 Contact Person: Posting Date: 03/28/2018
 Customer Ref. No.: Delivery Date: Document Date: 03/28/2018
 Local Currency: Owner: Total: 0.00 \$

Contents

Item/Service Type	Item
1	

Sales Employee: -No Owner: Total: 0.00 \$

Remarks:

Add Cancel Copy From Copy To

Procurement Confirmation Wizard

Base Document Type and Customers
 Choose whether to base the procurement documents on sales orders or sales quotations, and select the customers for whom you want to create the procurement documents.

Base Doc.: Sales Order

#	BP Code	BP Name	
	C30000	MICROCHIPS	<input checked="" type="checkbox"/>

Include All Open Base Documents

Clear Table Add

Step 1 of 6 Cancel Back Next Finish

Procurement Confirmation Wizard

Procurement Confirmation Wizard

Base Document Type and Customers
 Choose whether to base the procurement documents on sales orders or sales quotations, and select the customers for whom you want to create the procurement documents.

Base Doc.

#	BP Code	BP Name	
⇒	C30000	MICROCHIPS	<input type="checkbox"/>
⇒	C20000	Maxi-Teq	<input checked="" type="checkbox"/>

Include All Open Base Documents

Step 1 of 6

If this box is not selected, the only sales orders displayed are those for which the procurement document option was checked on the Logistics tab of the sales orders.

When you click Next, all open sales orders from the selected customers are displayed in the Base Documents window. You can select the sales orders you would like to fulfill and choose Next.

Procurement Confirmation Wizard

Base Documents
 To generate the procurement documents, select one or more base documents. You can consolidate several base documents into one procurement document.

#	#	Date	Customer	Customer Name	Due Date	Remarks	Posting Date
27	⇒ 412	11/13/20	C30000	MICROCHIPS	11/13/2017	555-0103	11/13/2017
28	⇒ 414	12/07/20	C30000	MICROCHIPS	12/07/2017	555-0103	12/07/2017
29	⇒ 415	12/07/20	C30000	MICROCHIPS	12/07/2017	555-0103	12/07/2017
30	⇒ 416	12/13/20	C30000	MICROCHIPS	12/13/2017	555-0103 F	12/13/2017
31	⇒ 417	12/14/20	C30000	MICROCHIPS	12/14/2017	555-0103	12/14/2017
32	⇒ 418	12/14/20	C30000	MICROCHIPS	12/14/2017		12/14/2017
33	⇒ 419	12/14/20	C30000	MICROCHIPS	12/14/2017	555-0103	12/14/2017
34	⇒ 420	12/14/20	C30000	MICROCHIPS	12/14/2017	555-0103	12/14/2017
35	⇒ 423	12/21/20	C30000	MICROCHIPS	12/21/2017	555-0103	12/21/2017
36	⇒ 430	03/27/20	C30000	MICROCHIPS	03/27/2018	555-0103	03/27/2018
37	⇒ 431	03/27/20	C30000	MICROCHIPS	03/28/2018	555-0103	03/27/2018
38	⇒ 432	03/28/20	C20000	Maxi-Teq	03/28/2018	555-0110 c	03/28/2018

Go To Final Step
 Keep Original Lines Sequence

Step 2 of 6

In the next screen, you may choose the base document line items to be included in the procurement documents. In the Target Document field, you may choose Purchase Order, Purchase Quotation, Purchase Request, or Production Order.

Procurement Confirmation Wizard

Base Document Line Items
 Select line items for inclusion in the procurement documents. To create a procurement document as a draft, select "Create Draft Documents". If required, you can change the vendor or the purchase quantities.

Target Document: **Purchase Order** Print Target Document
 Create Draft Document

Vendor:
 Name:

Target Doc. Series: **Primary** Delivery Date:

#	Vendor	Target Doc. Series	Base Doc.	Item No.	Item Description	Quantity	Unit Price	D
1	V10000	Primary	417	A00001	J.B. Officeprint 14205	1.000	400.00 \$	
2	V10000	Primary	420	A00001	J.B. Officeprint 14205	2.000	400.00 \$	
3	V10000	Primary	431	A00001	J.B. Officeprint 14205	10.000	400.00 \$	

Step 3 of 6

The quantities for the selected items are, by default, the quantities from the sales orders. You may change these if you wish. If an item has a preferred vendor assigned to it in the item master data, this vendor is populated in the line. You may change this if necessary. For all items that do not have a vendor assigned to them, you must enter a vendor code. You may also specify the same vendor for all items, by entering the vendor code in the Vendor field of the wizard.

Procurement Confirmation Wizard

Base Document Line Items
 Select line items for inclusion in the procurement documents. To create a procurement document as a draft, select "Create Draft Documents". If required, you can change the vendor or the purchase quantities.

Target Document: **Purchase Order** Print Target Document
 Create Draft Document

Vendor: **V20000**
 Name: **Lasercom**

Target Doc. Series: **Primary** Delivery Date:

#	Vendor	Target Doc. Series	Base Doc.	Item No.	Item Description	Quantity	Unit Price	D
1	V20000	Primary	417	A00001	J.B. Officeprint 14205	1.000	200.00 \$	
2	V20000	Primary	420	A00001	J.B. Officeprint 14205	2.000	200.00 \$	
3	V20000	Primary	431	A00001	J.B. Officeprint 14205	10.000	200.00 \$	

Step 3 of 6

Click Next when finished.

In the Consolidations screen, you can specify whether to consolidate several sales orders into one purchase document and which consolidations to apply:

Desired Result:	Choose:
Create one purchase order per sales order	No consolidation - Documents are grouped by vendor (one purchase order per vendor)
Consolidate several sales orders into one purchase order	Consolidated by: - Vendor (system default) - Warehouse (one purchase document per warehouse) - Other (you can specify additional grouping criteria, such as delivery date or shipping type)

You may also choose the system response to error that may occur in the document generation process in the If an Error Occurs field. Click Next when done.

You can preview the results that will be generated on the next screen:

Procurement Confirmation Wizard

Preview Results
 The list below shows the procurement documents that will be generated. If item lines for production orders have different distribution rules or project codes, separate production orders will be generated according to these rules/codes.

Target Document: Print Target Document
 Create Draft Document

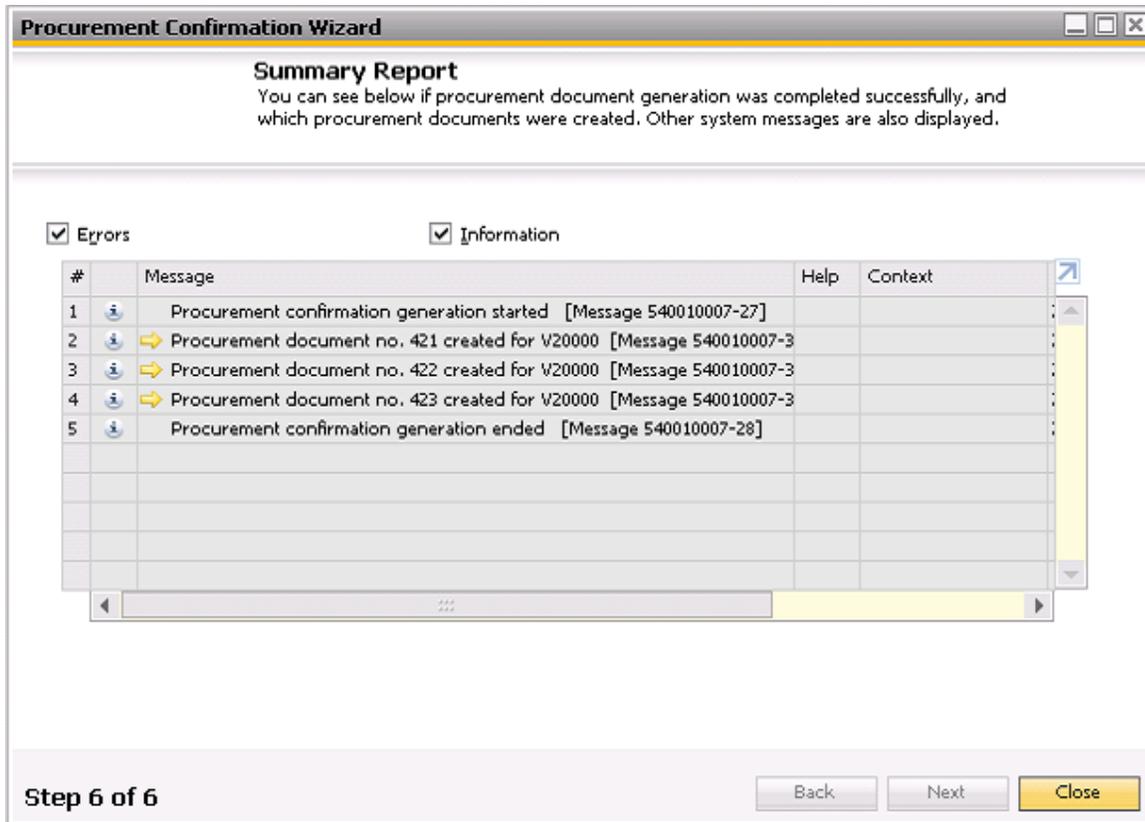
Vendor:
 Name:

Target Doc. Series: Delivery Date:

#	Vendor	Vendor Name	Target Doc. S...	Item No.	Whse	Series	Ship-to Name	Sh...
1	▼ V20000	Lasercom						
2			▼ Primary					
3				A00001	01	Primary	Ship To	161
4	▼ V20000	Lasercom						
5			▼ Primary					
6				A00001	01	Primary	Ship To	161

Step 5 of 6

In the Summary Report, you can see the results of the document generation:



Summary

The ability to procure items upon adding sales orders is well suited for companies who use JIT (just in time) inventory. To allow users to turn sales documents into purchasing documents, please ensure they have access to the Procurement Confirmation Wizard in addition to Sales Orders.

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