



Coffee Break & Learn: Tip of the Week – November 21, 2017

Every Package Needs a Packing Slip

Available On All Softengine-Supported Versions

Background

After preparing items to be shipped to customers, you may need to customize and track the packaging for those items. In all our supported version of SAP Business One, you have the option of creating a packing slip for Delivery, A/R Invoice, and A/R Invoice + Payment documents. The following will illustrate the packing slip creation process through both manual input and item master data definition.

Creating a Packing Slip – Manual Entry

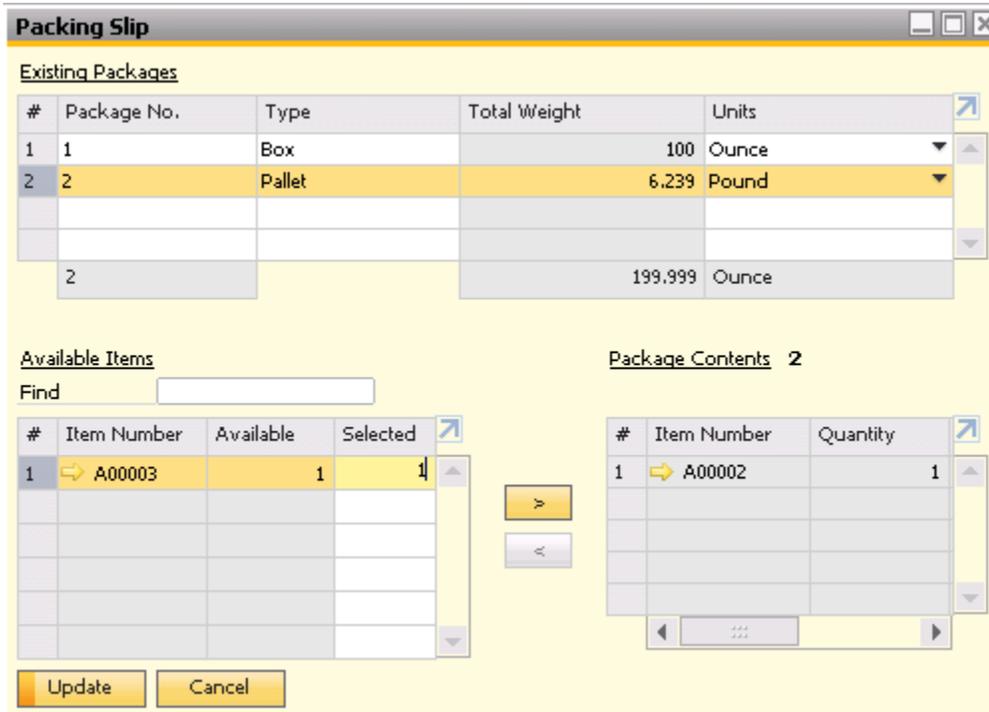
To create a packing slip, navigate to a Delivery, A/R Invoice, or A/R Invoice + Payment document, right click to open the context menu, and select Packing Slip (or Packaging in 8.8 versions):

The screenshot shows the SAP Business One 'A/R Invoice' window. The 'Contents' tab is active, displaying a table with two items:

#	Item No.	Item Description	Quantity	Unit Price
1	A00002	J.B. Officeprint 1111	2	35
2	A00003	J.B. Officeprint 1186	2	52

The context menu is open over the table, with 'Packing Slip' highlighted. Other menu items include Cancel, Duplicate, Base Document..., Target Document..., Row Details..., New Activity, Gross Profit..., Volume and Weight Calculation..., Opening and Closing Remarks, Inventory Posting List, Related Activities, Transaction Journal..., Journal Entry, Applied Transactions, Related Opportunities, and Relationship Map... The background window shows document details for Customer C30000, Name Microchips, Contact Person Judy Brown, and Posting Date 11/13/2017.

In the Packing Slip window, you can document which items are packed in which package, as well as specify the number, type and weight of the packages. Note that each package may contain more than one item type.



The following describes the fields in the Packing List window that may not be self-explanatory:

Field	Description
Package No.	Enter the number for the package. By default, the system automatically enters a sequential number.
Type	Select a type of package. Alternatively, press Tab and select one of the types. To define a new package type, select New.
Total Weight	Displays the total weight of the package. The value of the field is calculated according to the weight you have defined on the Sales Data tab in the Item Master Data.
Units	Select the unit of measurement for the weight of the package.
Find Available Items	Enter the item code to find the necessary item from the list.
Available	Displays the quantity (in purchasing UoM) of items available for packing.

Selected	Enter the number of items that you actually plan to pack in the special package. The value cannot be larger than the value in the Available field.
Package Contents	Displays the number of different items making up the package.
Quantity	Displays the quantity (in purchasing UoM) of items in the package.
UoM	Displays the UoM specified for an item in associated purchasing documents.

Creating a Packing Slip – Item Master Data Definition

In addition to creating the packing slip by manual entry, you also have the option of defining the packaging for each item in the item master data. There are two prerequisites for using this option.

1. Specify the packaging type and quantity per package for each item master data.

You must first navigate to the item master data for which you would like to configure the packaging and select the Sales Data tab. In this tab, you will see the fields Package Type and Quantity per Package.

The screenshot shows the 'Item Master Data' window with the 'Sales Data' tab selected. The following fields are visible:

- Item No.: Manual A00002
- Text: J.B. Officeprint 1111
- Foreign Name:
- Item Type: Items
- Item Group: J.B. Printers
- UoM Group: Media
- Price List: Base Price
- Bar Code: Each
- Unit Price: Primary Curre 200.00 \$ Each
- Inventory Item:
- Sales Item:
- Purchase Item:
- Sales UoM Code:
- Sales UoM Name:
- Items per Sales Unit: 1 Each
- Length:
- Width:
- Height:
- Volume: ci
- Weight:
- Package Type: (highlighted)
- Quantity per Package: 1 (highlighted)

Clicking the button will display the Sales UoM and Package Types window.

Sales UoM and Package Types

Item No. UoM Group Inventory UoM

Sales UoM

-
-
-
-

Unit Name

Items per Unit = Each

Sales UoM Dimensions

Length

Width

Height

Volume

Weight

Package Types

-
-
-
-

Qty per Package

Package Type Dimensions

Length

Width

Height

Volume

Weight

You may then define a packaging type for each sales unit of measure for that item. Click Update when finished.

Sales UoM and Package Types

Item No. UoM Group Inventory UoM

Sales UoM

-
-
-
-

Unit Name

Items per Unit Each = Each

Sales UoM Dimensions

Length

Width

Height

Volume

Weight

Package Types

-
-
-
-
-

Qty per Package

Package Type Dimensions

Length

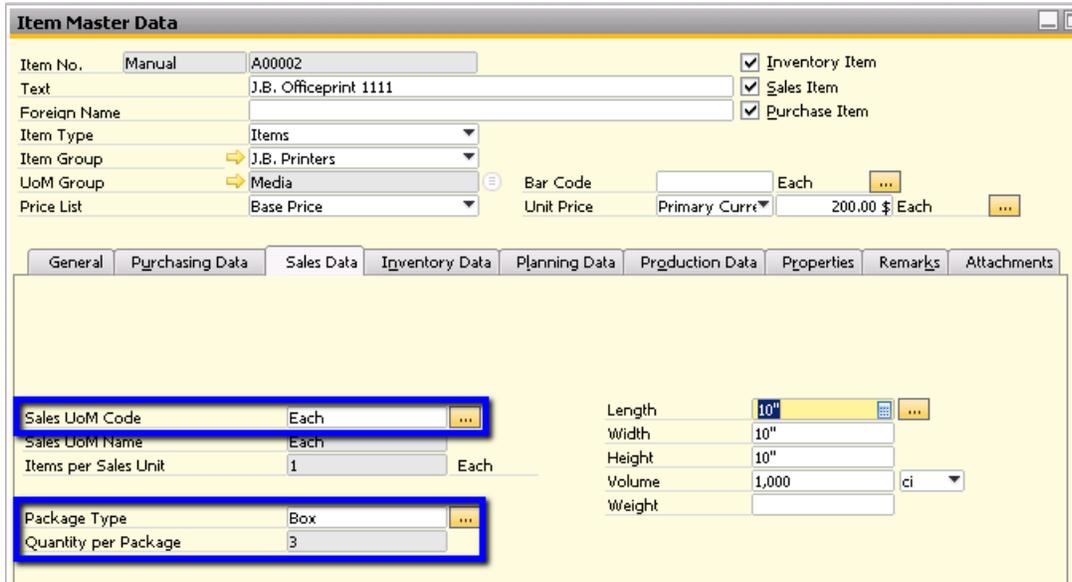
Width

Height

Volume

Weight

Click OK once more in the Sales UoM and Package Types screen to return to the Sales Data tab. Input the default Sales UoM code and Package Type you would like to use. The Quantity per Package value will default from your inputs in the Sales UoM and Package Types screen.



Item Master Data

Item No. Manual A00002 Inventory Item
Text J.B. Officeprint 1111 Sales Item
Foreign Name Purchase Item
Item Type Items
Item Group J.B. Printers
UoM Group Media Bar Code Each ...
Price List Base Price Unit Price Primary Curr 200.00 \$ Each ...

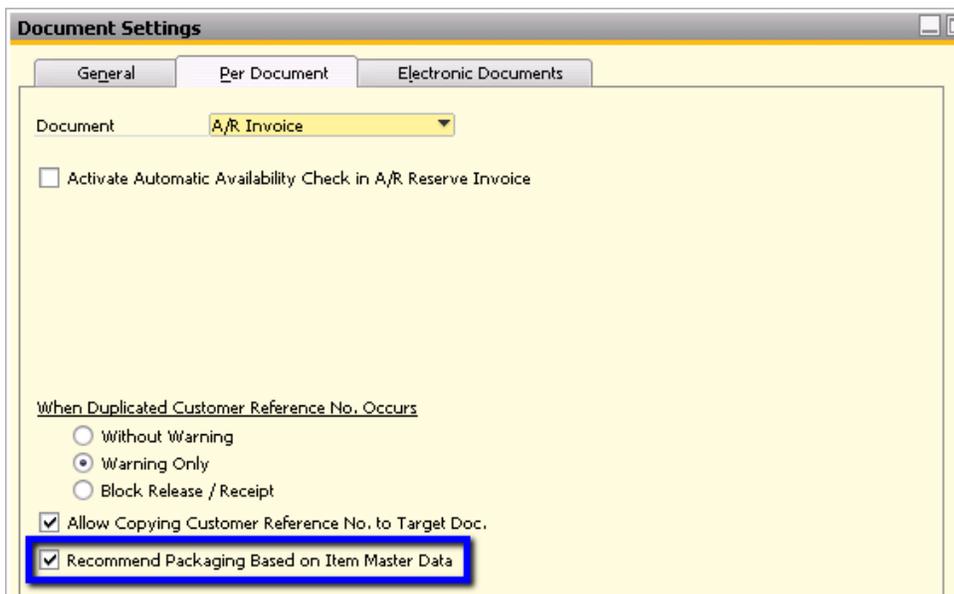
General Purchasing Data **Sales Data** Inventory Data Planning Data Production Data Properties Remarks Attachments

Sales UoM Code Each ... Length 10" ...
Sales UoM Name Each Width 10"
Items per Sales Unit 1 Each Height 10"
Package Type Box Volume 1,000 ci
Quantity per Package 3 Weight

Ensure you click Update in the Item Master data as well.

2. Set the Document Settings to recommend packaging based on item master data.

Navigate to Document Settings (Administration > System Initialization > Document Settings) and select the Per Document Tab. You can then select the document type you would like to configure. Select the Recommend Packaging Based on Item Master Data checkbox.



Document Settings

General **Per Document** Electronic Documents

Document A/R Invoice

Activate Automatic Availability Check in A/R Reserve Invoice

When Duplicated Customer Reference No. Occurs

Without Warning
 Warning Only
 Block Release / Receipt

Allow Copying Customer Reference No. to Target Doc.
 Recommend Packaging Based on Item Master Data

Click Update.

After fulfilling the above two prerequisites, when you select Packing Slip from the context menu of the sales documents, the system will select the packaging according to the item master data specifications.

Packing Slip

Existing Packages

#	Package No.	Type	Total Weight	Units
1	1	Box		Ounce
2	2	Pallet		Ounce
	2			Ounce

Available Items

Find

#	Item Number	Available	Selected

Package Contents 1

#	Item Number	Quantity
1	A00002	2

OK Cancel

Note:

- 1. The option of setting predefined packages for items is only available for items with non-manual UoM groups.
- 2. The prepopulated packing slips may always be changed manually.

Summary

The Packing Slip feature enables you to document the packaging as well as the items you wish to ship. The packing slip can be printed or displayed with the Delivery, A/R Invoice, A/R Invoice + Payment documents, thus enabling you to track the shipped items.

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