PUBLIC
SAP Inventory Manager
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SAP Inventory Manager User Guide - Phone

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Content

Document History

Before you begin reading this guide, be sure that you have the latest version. Find the latest version at https://help.sap.com/viewer/product/SAP_Inventory_Manager/latest/en-US.

The following table provides an overview of the most important document changes.

Document	Date	Description of Changes
1.0	JUL 2021	Original release of the *SAP Inventory Manager User Guide - Phone*, version 4.4.

1 About This Guide

This user guide is provided for end users of the SAP Inventory Manager application. The contents of this guide reflect the behavior and functionality of the SAP Inventory Manager application as provided by SAP through the software installers for the application. SAP Inventory Manager was developed using and deployed on the SAP Mobile Platform.

One of the benefits of this platform is the ability to configure many aspects of the SAP Inventory Manager application's behavior. For this reason, it is likely that differences will exist between the information documented in this guide and the final behavior of the application for a given implementation. In some implementations, the differences between this guide and the actual configuration of the application will be significant.

2 Mobile Add-On for ERP Overview

Mobile Add-On for ERP is a set of pre-built mobile applications that are used for:

- Increasing productivity by eliminating paperwork and reducing foot traffic
- Improving decision-making by giving mobile workers easy data access at the point of performance
- Gaining the maximum value from enterprise applications, such as SAP, with timely and accurate data collection
- Lowering operating costs by reducing overhead and getting more from existing resources

With mobile solutions from SAP, organizations can create a seamless flow of information between business units that improve efficiency and move operations closer to real-time.

By deploying multiple products, organizations ensure that real-time data updates to one application can drive another action or transaction in a parallel business unit. Using Mobile Add-On for ERP, organizations eliminate delays traditionally caused by paperwork backlogs and communication flaws, streamlining work flow and delivering benefits to multiple business units.

The SAP Mobile Platform makes it simple and cost-effective to deploy and manage multiple Mobile Add-On for ERP products. Built on the SAP Mobile Platform, using Agentry, all Mobile Add-On for ERP products are 100% configurable and centrally administered through application updates that automatically flow to users' devices while deployed in the field. Agentry provides the flexibility, scalability, and features that ensure Mobile Add-On for ERP mobile applications are future-proof and remain on the cutting-edge of mobile technology.

In addition to the ability to deploy on a wide range of mobile devices and utilize an array of communications methods, Agentry provides out-of-the-box integration with more than 25 popular mobile peripherals, including bar codes, RFID, GPS, and GIS, as well as support for multiple international languages.

Businesses can lower the total cost of ownership for their collective mobile projects by deploying on a single mobile platform. The addition of new Mobile Add-On for ERP products does not add an additional burden to your IT team because they are prepackaged proven applications built on the same underlying technology. Solutions can be integrated to feed multiple back end systems, improving communications across the enterprise.

2.1 SAP Inventory Manager Functionality Overview

SAP Inventory Manager is a complete wireless inventory management solution. It provides the tools to improve and manage inventory levels, efficiently fill customer orders, and track the movement of materials using mobile devices with scanning functionality. The mobile application accesses the SAP Enterprise Asset Management (EAM) solution and empowers you to provide your technicians and warehouse management staff with the ability to execute stockroom operations in an automated and seamless way. The ease of operation ensures that you keep your valuable parts and spares under control and ready to respond.

The Mobile Add-On for ERP extends the following functionality to a mobile device:

- Physical Inventory Count: Physical counts of materials are recorded using Mobile Add-On for ERP on a mobile device are applied to the SAP database without the need for data entry.

- Materials Movement: A material movement is a change in stock such as an issue, transfer, or a return. SAP Inventory Manager extends the issues and transfers recording functionality of SAP to a mobile device. Movement in stock can be recorded directly as it occurs using SAP Inventory Manager. These changes are applied to the SAP database without the need for data entry.
- Materials Receipt: A material receipt is an increase in stock. For example, when the receipt of materials from a vendor or production is posted. SAP Inventory Manager extends the material receipt functionality of SAP to a mobile device. The receipt of materials can be recorded to the SAP database without the need for data entry.
- Check availability of materials while on the job
- Accept and distribute incoming materials by purchase order
- Prepick materials based on work orders
- Speed receipt and back-order reporting to and from shipping and receiving

2.1.1 SAP Inventory Manager Landing Page

The main screen for SAP Inventory Manager is the landing page, which will always be the start of your navigation process into the application whenever you log in to begin your work day.

When you first log onto SAP Inventory Manager and tap *Main Screen*, you will be taken to a landing page with four main icons. You will choose one of these icons depending on what activity you need to perform in the application:

- **Inbound:** Add goods or materials to your inventory
- **Outbound:** Take goods or materials out of your inventory
- **Internal Process:** Move stock around, view inventory levels, perform physical inventory counts, pick stock from your warehouse to prep for transport, or put away warehouse stock from receiving into the proper bins
- **Orders:** Create purchase requisitions

An example of using the landing page icons in several processes is as follows:

You start on the landing page and tap *Orders* to create a new requisition for some materials. The purchasing department receives that request and buys the materials. When the materials arrive at the plant, receiving creates a goods receipt using the *Inbound* screens in order to add the goods to their inventory. Another user puts them away on the shop floor using the *Put Away* tab under the *Internal Process* icon. Now you can use these materials in your production line, so you create a goods issue documentation under the *Outbound* icon for them, which takes them out of the inventory.

2.1.2 SAP Inventory Manager, Warehouse Stock, and User Roles

Inventory management is the process of efficiently monitoring the flow of products into and out of an existing inventory in the warehouse. This process involves controlling the receipt of products in order to prevent the inventory from becoming too high or too low.

It is important to understand that Warehouse Stock and user roles are configured separately in the back end by your administrator. For example, you could have a user role of Warehouse Manager, but Warehouse Stock may

not be enabled in the application. That could affect the screens that you do or do not see. Each site and configuration will be different, and not all examples can be covered in the tables in this section. If you have any questions about your configuration, ask your administrator.

SAP Inventory Manager without Warehouse Stock Enabled

When inventory gets too high, items are stored at an unnecessary cost. When inventory is too low, it can cause a stock-out and production could be halted due to a lack of raw materials. In SAP, the inventory management functionality revolves around the movement of materials in and out of the storage facility and the physical count of those items at regular intervals. Since the basic SAP Inventory Manager application tracks the total stock of materials for a storage location, you will use this when you have a warehouse that is small and easily managed.

SAP Inventory Manager with Warehouse Stock Enabled

Enabling Warehouse Stock in the SAP Inventory Manager application provides flexible, automated support in processing all goods movements and in managing stocks in your warehouse complex. The system supports scheduled and efficient processing of all logistics processes within your warehouse. Warehouse Stock allows you to map your entire warehouse complex down to the storage bin level. Not only do you gain an overview of the entire quantity of material, you also always have the ability to determine exactly where a certain material is within your warehouse complex.

You can use warehouse stock to optimize the use of all of your storage bins and warehouse movements and to store material stocks from several plants together in warehouses with random storage. This allows you to optimize the use of all storage bins, mix pallets belonging to several owners in randomly slotted warehouses and still know exactly where a particular material is located within your warehouse complex.

User Roles

User roles are controlled through back end configuration, and define what you, the user, see on your client device. Depending on your defined role, you may or may not see various tabs, action menu items, or have access to certain fields. There are three user roles you can be assigned in the SAP Inventory Manager application. You can only be assigned one role at a time. Following are the three user roles:

- **IM:** SAP Inventory Manager user; limited to only inventory-level screens and transactions
- **WH:** Warehouse Manager user; able to view basic SAP Inventory Manager screens like receipts, issues, etc. Also able to view Warehouse screens and transactions.
- **IMWH:** Dual user; able to view all screens and transactions for both SAP Inventory Manager and Warehouse Stock

Viewing Screens and Understanding User Roles

As mentioned above, depending on your assigned user role, you may or may not see certain tabs, screens, or have some fields on screens available to you. If you are unsure of what user role you are assigned to, the following tables can help you to figure out which screens are assigned to which user role.

Screens Visible by User Roles*

Group Category	Tab Name	Show for User Role	Hide for User Role	Comments
Inbound	Receipts	IM, WH		
Inbound	Reversals	IM, WH		
Inbound	Put Away	WH	IM	
Outbound	Issues	IM, WH		
Outbound	Reversals	IM, WH		
Outbound	Pick	WH	IM	
Internal Process	Physical Inventory	IM, WH		There is only one tab for physical inventory counts, thus, it will show for all user roles. IM: Two Action menu items for physical inventory: *Document Download* and *Add* WH: Two Action menu items for physical inventory: *Document Download* and *Add* IMWH: Four Action menu items that allow a user to add/download physical inventory at both the Inventory Manager and the Warehouse Manager level.
Internal Process	Reversals	IM, WH		
Internal Process	Stock Overview	IM, WH		There is only one tab for Stock Overview, therefore, it will show for all user roles. As with physical inventory counts, different action items will display based on user roles to perform searches at the IM or WH level.

Group Category	Tab Name	Show for User Role	Hide for User Role	Comments
Internal Process	Stock Transfers	IM	WH	
Internal Process	Transfer Orders	WH	IM	
Internal Process	Put Away	WH	IM	
Internal Process	Pick	WH	IM	
Orders	Purchase Requisitions	IM, WH		

* - IM, WH stand for SAP Inventory Manager and Warehouse Manager, respectively. IMWH stands for a dual-role consisting of both SAP Inventory Manager and Warehouse Manager.

Physical Inventory Action Menu List

Menu Item Name	Show for User Role
Download Physical Inventory	IM, IMWH
Download Warehouse Inventory	WH, IMWH
Add Physical Inventory	IM, IMWH
Add Warehouse Inventory	WH, IMWH

Stock Overview Action Menu List

Menu Item Name	Show for User Role
Download Inventory Stock	IM, IMWH
Download Warehouse Stock	WH, IMWH

2.1.3 Single Sign-On (SSO)

SSO gives the mobile user the ability to change or reset the log in password from the mobile device.

Single sign-on (SSO) allows the user to log into the SAP Inventory Manager application from the mobile device using single sign-on credentials without having to enter your Mobile Add-On for ERP user name and password. In addition, once logged in with SSO, the mobile user has the ability to access another mobile application without the need to log in again.

2.2 How SAP Inventory Manager Works

The SAP Inventory Manager client is the component that you will work with. The client runs on the handheld device used to track your work.

When new measurements are entered into the SAP Inventory Manager client, the client saves this information on the handheld device. A transmit must be performed to update the SAP database with the new information. A transmit is a connection between the handheld computer and a component of SAP Inventory Manager called the server. The server will connect to the SAP Inventory Manager database and update it with the new information entered on the handheld device. The server will also download any new information from the SAP ERP database and pass it back to your handheld device.

When the SAP Inventory Manager client and server connect, the client will send the server any changes you have made. The server will then update these changes to the SAP ERP application. The SAP Inventory Manager server will also retrieve any new information related to your work. This includes new work order lists, locations, equipment, and points since the last time you performed a transmit. After the server retrieves this information from the SAP ERP database, it sends it to the SAP Inventory Manager client, where you will see it displayed.

During a transmit, the SAP Inventory Manager server can add or change functionality on the SAP Inventory Manager client of your device. These changes can adjust the appearance of the client, such as adding a new button or a new screen. This is because the SAP Inventory Manager application can be easily modified by application developers to keep the application up to date with your current needs and responsibilities, making SAP Inventory Manager a flexible application. These changes then can be deployed to handheld devices in the field when the client transmits to the server. No special actions are required when application changes are retrieved during a transmit. For example, you will not need to restart the client on your handheld device. You will be notified ahead of time before such changes occur, and should be given training and information on how these changes will relate to your work.

Your handheld device will need access to your work site's computer network when performing a transmit. Access can vary on different work sites. Some common ways to access a network are:

- A modem connection using a standard phone line
- A network connection using a network card and a network cable
- A radio frequency wireless connection
- A wireless cellular phone modem

The same information is sent back and forth between the SAP Inventory Manager client, SAP Inventory Manager server, and the SAP ERP application using any of these connection types. How to perform a transmit and which connection type to use are discussed in more detail later in this guide.

3 Installing the SAP Inventory Manager Client on an iOS or Android Device

Prerequisites

Your mobile device must be able to connect to the Internet to download the client application.

> **i** Note
>
> Supported Android devices include Android phones and the 10" Android tablet. The 7" tablet is not supported. Only iOS 9.x and 10.x devices are supported by the SAP Inventory Manager client.

Context

Download the SAP Inventory Manager client to your iOS device from the App Store. Or, download the SAP Inventory Manager client to your Android device from the SAP Service Marketplace. A demo version is initially downloaded, complete with demo data, so that you can get accustomed to the application before connecting to your production server. When you are ready, you simply exit the demo and log in to your server and start working.

Procedure

1. Go to the applicable store for your device and in the *Search* box, type **`SAP Inventory Manager`** and tap *Search*.

   The application description opens.
2. Tap *Free* and then tap *Install*.

   The SAP Inventory Manager client application is downloaded from the store and an icon is placed on the mobile device.
3. Tap the icon to open the application.

   A login screen displays with the default user *Demo* listed in the *User* field.
4. Tap *OK* to log in. You cannot change the user name and no password is necessary.

   The SAP Inventory Manager client opens and is ready to use with prepopulated demo data.

Results

The SAP Inventory Manager client is installed on your mobile device in demo mode.

> **i** Note
>
> To check the version of the client software, tap the *Information* icon on the Module screen of the mobile device.

Next Steps

Once you are comfortable with the application and want to begin using it with your production server, tap *Exit Demo*. A fresh login screen is displayed. Enter your user name and password to log on.

4 Transmitting Overview

The client is designed to run independently of the server. This means that it is not necessary to maintain a constant connection between these two components of the application. The client will function normally on its own and provide you with the information needed to perform your tasks. The only time these two components need to be connected through a network is during a transmit.

A transmit is defined as a communication between the client and server during which information is exchanged. Put another way, a transmit is when the client tells the server what new information it has, based on the information you have given it; and the server tells the client what has changed in the SAP system that is relevant to you. Additionally, the server also provides the client with changes to the application, if any.

When you perform a transmit, the client will first send up any changes you have recorded while performing your work. The server will then add these changes and new information to the SAP application. Next, the server will check the SAP ERP software for new or changed information and retrieve it. It will then send this information down to the client.

Once the client receives new information from the SAP ERP system, it will be displayed to you in the associated screens. For example, items such as new locations or equipment will be available for selection or modification as needed, if applicable. Likewise, any information sent to the SAP ERP will also be available to SAP ERP users immediately.

During a transmit, the server will send down any changes to the application itself. These changes can include new or modified screens, new buttons, or old buttons to remove from existing screens, added and removed fields, and a multitude of other possible changes. When these changes are sent to the client, they will be in effect immediately. After the transmit has completed, you will see any modifications right away. You do not need to restart the client or perform any other special tasks. Normally when these types of changes occur, you will be notified about them in advance and, if necessary, be given instruction on how to use any new features or functionality. Some changes may occur that will not affect how you interact with the client. You may see messages during the transmit that indicate a change has occurred, but it is possible that the change affects the inner workings of the client without changing its appearance.

Transmits can be performed at any time, provided the necessary network structure is available. For example, if performing a transmit using a dial-up modem connection, a phone line must be available. If a wireless connection is in use, the device must be within the coverage area of the wireless network. If the network resources are available, you can perform a transmit any time you wish to update new information to the SAP ERP software and retrieve new information from it.

4.1 Methods of Transmitting

To perform a transmit between the client and server, there must be a network connection between these two components. This network connection can be established using one of several different methods. Which one is used depends on the capabilities of the mobile devices in use and the network structure at a work site.

Regardless of how the network connection is made, the information that is transmitted is the same. Application changes, new information from the SAP ERP software, and information to update to SAP ERP is always exchanged between the client and server.

WebSockets is a standard for allowing bidirectional real-time communication between clients and servers that is encapsulated within another transport protocol, such as HTTPS. Agentry on the SAP Mobile Platform uses WebSockets to route its binary communication protocol (known as ANGEL in previous Agentry releases) through HTTPS.

WebSockets enables Agentry components to work consistently across the enterprise, in tandem with other SAP Mobile Platform components, and allows Agentry to leverage WebSockets-aware HTTP reverse proxies.

Once the transmit is completed, you can be confident that the information you have sent is processed, and the information you have received is that which you need for your work.

4.2 Performing an Initial Transmit

Before using the mobile application, you have to perform an initial transmit in order to push down data from the SAP back end to your mobile device.

Context

The following procedure explains how to start the SAP Inventory Manager client on the mobile device for the first time and perform the initial transmit. Note that the initial transmit is normally performed only once, just after the application has been installed to the mobile device. In many environments, this may not be necessary, as it is possible to install this application in such a way as to negate the need for the initial transmit.

Ensure that the device running the client has a network connection established or is plugged into a desktop computer using the appropriate cable connection.

> **i** Note
>
> If you have never logged in to SAP, you must go to a desktop and change your password before using any mobile device.

Procedure

1. Tap the Agentry icon from the main screen of your mobile device to start the SAP Inventory Manager client.

   The client starts, displaying the logon screen.
2. Using the on-screen keyboard, enter your *User ID* and *Password*. You need to enter this information each time you start the client. After you enter your user ID and password, tap *Go*.

   A `Must connect to server` message displays.
3. Select or enter your SAP Inventory Manager server information.
4. The initial data transmit begins.
5. When the transmit is complete, you are automatically returned to the main screen.

Results

> **i** Note
>
> If the initial sync is stopped and re-started for any reason, you should reset the client and restart the initial sync with no interruptions until it is successful. An interruption to an intial sync could cause some data to not be transmitted from the SAP back end to your client, which will then result in transmission errors later while you are performing your work tasks.

The SAP Inventory Manager application is now ready to use. See the other topics in this user guide for more information on using the application.

4.3 Performing a Standard Transmit

Context

A standard transmit is performed after you have entered information in the SAP Inventory Manager client, or if there is new information to be retrieved from the SAP application. You can perform a transmit at any time a network connection is available.

Procedure

1. To begin the transmit, tap the *Transmit* button, located on the top right of most screens.

   The Transmit screen displays and the transmit progress is shown.
2. There is nothing else to do. When the transmit is complete, you are automatically returned to the main screen of the application.

5 Filtering Search Results

Often, the number of items assigned to you can be quite large. A large list can make it difficult to locate a specific item. You can use filtering to create a list where only certain items are displayed rather than all of them, according to your specified criteria. The records not displayed in your filtered list are still stored on the client and are not deleted.

To create a filter, tap the *Filter* icon at the top of the list pane. Depending on the device you are using, either a new pop-up window or a screen displays where you select the column to filter, the value to filter, and the comparison to make between the column and the value selected. Once you create and enable a filter, the screen you chose to filter only displays the objects that match the filter criteria.

Column

The column selected in a filter is one of the columns in the main screen of list items. You select the column to filter on. The value in this column for each record will be compared to the value you enter, using the comparison you choose.

Operator

The operator is the comparison relationship between the column and the value. You select the comparison from a list of choices in the drop-down menu. The comparison determines which records are displayed in the list by comparing the selected column to the selected value. Following are detailed descriptions of the comparisons that can be made in a filter:

- **Less Than:** Displays the records in the screen where the value of the selected column is less than the value you entered. This excludes records where the value of the column is equal to the value you entered.
- **Less Than or Equal:** Displays the records in the screen where the value of the selected column is smaller than or equal to the value you entered. This is the same comparison as Less Than, except that records that are equal to the value you entered are also included in the filter results.
- **Equal:** Displays the records in the screen where the value of the selected column is the same as the value you entered.
- **Not Equal:** Displays the records in the screen where the value of the selected column is not the same as the value you entered.
- **Greater Than or Equal:** Displays the records in the screen where the value of the selected column is greater than the value you entered. This also includes any records where the value of the column is equal to the value you entered.
- **Greater Than:** Displays the records in the screen where the value of the selected column is greater than the value you entered. This excludes any records where the value of the column is equal to the value you entered.

- **Between:** This comparison requires you to enter two values rather than one. When the values are entered, the screen displays the records where the value of the selected column is greater than or equal to the first value and less than or equal to the second value.
- **Not Between:** This comparison requires you to enter two values rather than one. When the values are entered, the screen displays the records where the value of the selected column is less than the value you entered and greater than the second value you entered.

Value

The value for a filter is compared to the selected column using the operator you choose. You select the value from a displayed list. The list contains the value of the selected column for each record in the list. If more than one record contains the same value for the selected column, that value is only listed once.

Result

Once you create a filter, the list is immediately refreshed to display only the results matching the filter you defined. The filter icon will have an *X* next to it, indicating a filter is being used.

Tap the filter icon to either edit the filter or remove the filter and return to the full list.

6 Performing an Add or Download

After the intial transmit in SAP Inventory Manager, all screens will be blank until you peform an add or a download for the appropriate data to populate the screens.

Context

> **i** Note
>
> Peforming a *Download* on top of a screen already populated with data erases the already existing data and replaces it with the data from the data found by the search terms used in the *Download* screen.

Procedure

1. For the screen on which you want to populate with data, tap the *Action* icon:

   

2. In most cases, you can click either *Download* or *Add*. Other times there could be various types of *Add* options. When you download, you are pulling information from the SAP ERP back end. When you add to the client, you are creating a new list on the client itself.
3. Click *Download* to generate data from the back end.
4. Fill out all of the appropriate fields and tap *Finish*.

   The client transmits to the SAP ERP back end and populates the tab you chose with the data resulting from your field choices.
5. In another tab, or that same tab, click the *Action* button and choose *Add*.
6. Fill out the fields requested and tap *Finish*. Note that any fields that are required will turn red and must be completed before you can complete the add process.

   A new *LOCAL* object for that tab is placed onto your screen. The next time you transmit, it will be sent up to the SAP ERP back end.

7 Common Functions for SAP Inventory Manager

7.1 Adding an Object

When you create a local object on the client device, the back end does not know it exists until you transmit. Therefore, you can edit it or even delete it until you perform a transmit.

Context

Depending on the type of object you add, you can immediately work with the object before transmitting to the back end. With some objects, you may have to perform a transmit to the SAP ERP back end and bring it back down to your client before peforming work with the newly-created object.

You would add an object in SAP Inventory Manager, for example, if you needed to add a *Physical Inventory* count that wasn't included on your device, you would create an ad-hoc, or local count, then transmit it to the back end for further processing.

Procedure

1. From the main tile list of a tab, click on the *Action* menu and choose *Add*. Note that if the only action is to add an object, the action menu is replaced by a plus sign icon. In that case, tap the icon.

   The Add [Object] screen appears.
2. Any fields that are available to be filled in can be tapped, and when tapped will bring up a drop-down menu, on-screen keypad, scroll-wheel, or numeric keypad from which to make your selection. Type in or select all field selections and when done, tap *Finish* to progress to the next Add [Object] screen or to complete the addition of the local object on the client.

   The new object is added to the main object list. Conversely, if more required information is needed (i.e., a required field was missed), that information is conveyed in an error message or the field itself displays a message stating what is required.

Results

Any changes made to the SAP Inventory Manager application locally result in a mini-transmit icon displaying by the information that has changed on the client. In this case, the mini-transmit icon is displaying next to your newly-added object on your tile list. These mini-transmit icons let you know that there is information on your client that you need to transmit to the SAP ERP back end.

Next Steps

Perform a transmit to the SAP ERP back end.

7.2 Adding a Warehouse Object

When you create a local warehouse object on the client device, the back end does not know that it exists until you transmit. Therefore, you can edit it or even delete it until you perform a transmit.

Context

With warehouse objects, you have to perform a transmit to the SAP ERP back end and bring it back down to your client before you can enter counts. When adding warehouse objects, you are limited to adding one object per message header at a time.

> **i** Note
>
> When working with warehouse objects, you must work in online mode. The following process does not work if you are in offline mode.

Procedure

1. From the main tile list of a tab, click the *Action* menu and choose *Add Warehouse [Object]*. Note that if 'Warehouse' is not in the *Action* menu name, the object is a regular Inventory Manager object. In that case, see the procedure Adding an Object [page 20].

   The Add [Object] screen for your warehouse object appears.
2. Any fields that are available to be filled in can be tapped, and when tapped bring up a dropdown menu, on-screen keypad, scroll-wheel, or numeric keypad from which to make your selection. Type in or select all field selections and when done, tap *Finish* to progress to the next Add [Object] screen or to complete the addition of the local object on the client.

   The new object is added to the main object list. Conversely, if more required information is needed (ex: a required field was missed), the information is conveyed in an error message or the field displays a message.
3. Click the *Transmit* icon.

   The message header is sent to the SAP back end.
4. From the *Action* menu, choose *Download Warehouse [Object]*.

   The Download [Object] screen appears.
5. Fill out all fields specific to the local warehouse object you have just created. In this way, you can bring down only the new warehouse object you created. Conversely, if you must download more warehouse

objects, select a range in the fields where you know that your object will also be found. When done, tap *Finish*.

The warehouse object or range of objects are downloaded to your client device.

6. Select the desired warehouse object from the downloaded list and perform your counts.

> **i** Note
>
> Physical count at the Warehouse level does not support recounts.

Results

Any changes made to the SAP Inventory Manager application locally result in a mini-transmit icon displaying by the information that has changed on the client. In this case, the mini-transmit icon is displaying next to your newly added object on your tile list. These mini-transmit icons let you know that there is information on your client that you must transmit to the SAP ERP back end.

Next Steps

Perform a transmit to the SAP ERP back end.

7.3 Editing an Object

After you create a local object on the client device, you can edit it or delete it until you perform a transmit.

Context

If you see an *Edit* icon or an *Edit Action* menu item that is active, you can edit the selected object on your main screen or detail screen.

Procedure

1. Tap on either the *Edit* icon or the *Action* menu and select the *Edit* option from the choices.

   The [Object] Edit screen appears.
2. Edit any desired fields using the on-screen keyboard, scroll wheel, or additional display screens. Fields that are not editable do not display any input devices when they are tapped.

3. When finished with your changes, tap *Finish* to save all changes and exit out of the [Object] Edit screen.

   The edited object is shown with a mini-transmit icon by it, indicating that some information has changed.

Results

Any changes made locally to the SAP Inventory Manager application result in a mini-transmit symbol displaying by the information that has changed. These symbols let you know that there is information you must transmit back to the SAP ERP back end.

7.4 Downloading an Object

Many of the screens in SAP Inventory Manager require you to download objects to populate the screens before you can work within the application using these screens.

Context

The process for downloading an object, whether it is stock, a transfer, a reversal, or another object in SAP Inventory Manager is very similar no matter which screen, tab, or client device you are using. Use this procedure as a general guideline for downloading an object to your application.

Procedure

1. From the *Action* menu on the tab or screen of your choice, tap on the *Download* command for the object that you need to download.

   The Download [Object] screen displays.
2. Fill out or make selections from desired fields on the screen. Note that the more fields you fill out, the more specific your downloaded selection will be. Tap *Finish* to begin the download of the object(s).

Results

The client transmits to the SAP back end and downloads your requested objects.

7.5 Discarding an Object

To remove, or clear, an object from your client without changing the back end, use the Discard option.

Using *Discard* only removes the object from your mobile device. The Discard option is especially useful when you have changed objects that you do not want to keep and you have not yet transmitted.

Before discarding an object, access the specific detail screen for the object. There are a number of ways to access a specific object:

- Use the *Search* box from the main list or detail screen to find the object you want to clear.
- If you prefer to select the object from a full list screen, open the list screen and select the object there.
- If you are already working in a detail screen from one of the main tabs, tap the *Action* menu and choose *Discard*. Alternatively, select the *Discard* icon, depending on your mobile device.

Once you tap on *Discard*, a pop-up window asks you if you are sure. Tap *Yes* to confirm the discard of the object.

> **i** Note
>
> If you mistakenly discard an object, you can always download the information back to your device from the back end again.

7.6 Working with Reversals

Reversals are used to cancel, or 'reverse', goods receipts, goods issues, and stock transfers at the SAP Inventory Manager level. At the Warehouse Stock level, you'll use another transfer order to move back or reverse your original transfer order.

When a reversal document is transmitted, it cancels out the corresponding data that is already in the SAP database.

For each reversal document, you can:

- Download the reversal document
- View the details of the reversal, in order to verify quantities before initiating the reversal
- Clear the reversal from the list
- Initiate the reversal
- Initiate all reversals
- Edit the reversal

Reversals are found in the *Inbound*, *Outbound*, and *Internal Process* tabs.

- The *Inbound* group only shows reversals for goods receipts for the following documents:
  - Purchase orders
  - Production orders
  - Advanced shipment notifications (ASNs)
  - Stock transport orders (STOs)
  - Ad hoc movement types 501 and 521

- The *Outbound* group only shows reversals for goods issues for the following documents:
  - Ad hoc movement types 201, 221, 231, 241, 251, 261, 281, 291, and 351
  - Production orders
  - Reservations
  - Outbound deliveries
  - STOs
- The *Internal Process* group only shows reversals for stock transfers of movement types 301 and 311.

7.6.1 Reversing a Material Document

You can download reversal material documents for both warehouse and non-warehouse managed storage locations.

Context

Use the following procedure to download reversal documents to a client device. You can access reversal documents from the *Inbound*, *Outbound*, or *Internal Process* tabs or screens.

Procedure

1. Navigate to the desired screen you wish to start from the landing page.
2. Tap on the *Reversals* tab.
3. Tap on the *Action* menu and select *Download*.

   The Download Material Documents screen appears.
4. Fill out any desired fields and download the material documents. Use the procedure Downloading an Object [page 23] if you need help.
5. Once the material documents are downloaded you can do the following:
   - *Reverse* or *Reverse All* of the items that you downloaded, or
   - *Discard All* of the items that you downloaded.

8 Working with Inbound Transactions

8.1 Working with Material Receipts

A material receipt item lists an increase in stock. The receipt of materials is recorded as it is delivered, ensuring that the delivery corresponds to what was planned from the vendor.

Use SAP Inventory Manager to track material receipts based on purchase orders and production orders. You can also enter materials received that do not correspond to an inventory order document.

Navigate to the receipts screen by tapping on the *Inbound* icon on the main Landing Page. The *Receipts* tab is the first main tab on the *Inbound* screen. The main receipts list is a list of all receipts currently saved on the client. Each record in the list represents one receipt.

From the main receipt list screen, you can:

- Add a new receipt to the list, if an order document is not available to reference. You can add external material receipts without a purchase order or external material receipts without a production order.
- Download a purchase order
- Download a production order
- Download an ASN (*Download Inbound* on the *Action* menu)
- Download an STO
- View the receipt details and access associated purchase orders and product orders
- Clear one or more receipts from the list

> **i** Note
>
> After an initial transmit, all screens are blank until you perform an *Add* or *Download* action for that screen. See the procedures Adding an Object [page 20] and Downloading an Object [page 23] for more information.

Purchase Orders and Production Orders

Purchase order documents contain details about material requested from either vendors or storage locations. Production order documents contain details about material that exists in specific storage locations.

With purchase orders and product orders, you can receive or return material. To log material receipts, retrieve the purchase orders (POs) or the product orders from the SAP Inventory Manager server.

After the purchase order or production order documents are downloaded, you can mark material within those documents as received.

Once received, you can return an item or add a serial number. If a material is serialized in the SAP ERP system, you can add additional items, with serial numbers, to an order. If an item is serialized, you can edit the serial number, if necessary.

Advanced Shipping Notification (ASN)

Advanced shipping notifications (ASNs), also known as vendor confirmations, are key documents in the collaboration between suppliers and customers. A supplier uses an ASN to inform a customer that he or she has sent a delivery to the customer. The ASN informs the customer which products and quantities are in transit and the expected arrival time of delivery. An ASN can be a loading or transport confirmation, an order acknowledgment, or a shipping notification.

Order and shipping confirmations are important components to ensure punctual delivery of consumables to customers. A form of confirmation in purchasing is inbound delivery, which is created from an incoming shipping notification. The shipping notification from the vendor is a confirmation to the purchasing organization of a delivery date for a certain quantity of ordered materials. A shipping notification could also be the date of performance of ordered services.

Two activities supported with ASN in SAP Inventory Manager include:

- Download and view ASN details on a mobile device
- Perform goods receipt of materials through ASN

Material Receipts When Warehouse Manager is Enabled

Material receipts are supported when warehouse manager is enabled. Material receipts are also supported for consignment stock.

8.2 Working with Inventory Valuation

The SAP ERP back end allows you to valuate materials either separately or together, according to different valuation criteria.

The way material stocks are valuated depends on the following:

- **Valuation category:** Defines whether the stocks are valuated jointly or separately. If stocks are managed separately, the category also specifies the criteria used to valuate the stocks. The criteria can include if the stocks are valuated by origin, in-house production or external procurement, or individual batches.
- **Valuation type:** Valuation type is a further subdivision of valuation category. For example, if the valuation category is *origin*, a company may want to define the valuation types as stock from *Los Angeles* and stock from *Detroit*.

You enter an inventory valuation type when you add a new material receipt. Inventory valuation is available for all four types of orders where the goods receipts process is available:

- Purchase order
- Production order
- STOs
- ASN documents that are Warehouse Managed and not already posted

> **i Note**
>
> For information on adding a general object, see the topic Adding an Object [page 20].

If the material you are adding is tied to a valuation category on the SAP ERP back end, the *Valuation Type* is active on the Add Goods Receipt screen. You can select any of the types from the dropdown menu.

If the material is a serialized or batch material, enter a serial or batch number on the second Add Goods Receipt screen. Then tap on *Finish* to complete the material receipt creation process.

9 Working with Outbound Transactions

9.1 Working with Material Issues

A material issue is a material movement in which a material withdrawal, or issue, material consumption, or a shipment of material is posted. A material issue leads to a reduction in warehouse stock. With SAP Inventory Manager, you can enter a material issue with or without a reference to a reservation.

Using the Material Issue screen, you can post a material withdrawal, a material issue, a shipment of material, an outbound delivery document, or a stock transport order, to a customer in real time, using the mobile device.

The main issue list provides the following information:

- ID
- Doc Date
- Header
- Items

From the main list, you can do the following:

- Add a new issue to the list
- Issue one or all items
- Edit a selected issue or add detail
- Clear an issue from the list
- If a material is serialized in the SAP system, you can add or edit serial numbers to the item issues in an issue document

For each selected issue, you can either:

- Get product orders based on specified parameters
- Get reservations documents of materials

Material Issues with Warehouse Stock Enabled

The material issues feature is supported at the warehouse level.

9.1.1 Working with Outbound Deliveries

An outbound delivery document contains all the data required to trigger and monitor the complete outbound delivery process. It is the document representing the goods that to be delivered together to a goods recipient.

The outbound delivery process allows you to stage products in the staging bay and to post goods issue from the warehouse. The system determines a staging bay using the production supply area. The outbound delivery takes place in the following processes:

- Processes in which the destination storage location is not an Extended Warehouse Management-managed (EWM) storage location, but an inventory-managed (MM-IM) storage location. The EWM system executes the staging.
- Processes with a two-step stock transfer using two EWM-managed storage locations and two warehouse numbers, such as shuttle processes.

In SAP Inventory Manager, both of these outbound delivery scenarios are covered for an inventory-managed storage location and for a two-step stock transfer for a warehouse managed storage location.

The main outbound delivery document list provides the following information:

- Total number of items in the delivery document list
- Item number
- Ship-to party
- Document date
- Total number of items in each collection

For each added outbound delivery document, you can:

- Post the selected goods issue
- Discard the selected goods issue

> **i** Note
>
> If any serialized or batch items need to be issued, a one-time message pops up before issuing the other items saying at least one item is serialized or batch-managed and requires manual entry. Press *Enter* to continue.

Outbound Delivery Documents with Warehouse Stock Enabled

The outbound delivery documents feature is supported at the warehouse level.

9.1.2 Working with Stock Transport Orders

Stock transport orders (STOs) are transfers between different plants in the same company.

The benefits of using stock transport order are:

- A goods receipt can be planned in the receving plant
- You can entor a transport vendor in the stock transport order
- Delivery costs can be entered in the stock transport order
- The stock transfer order is part of MRP (Material Requirements Planning): purchase requisitions that were created in MRP can be converted into stock transport orders.
- The goods issue can be entered using a delivery through Shipping
- The goods receipt can be posted directly to consumption
- The entire process can be monitored through the purchase order history

Each record in the list represents one stock transport order. The main stock transport order list provides the following information:

- Total number of items in the stock transport order list
- STO number
- Order type
- Supplying plant and description of the order
- Document date
- Item count

For each selected stock transport order, you can:

- Post the selected stock transport order
- Discard the selected stock transport order

Stock Transport Order with Warehouse Stock Enabled

The stock transport order feature is supported at the warehouse level.

10 Working with Internal Process (Warehouse Stock)

10.1 Working with Inventory

Physical counts of materials are recorded on your mobile device using SAP Inventory Manager. Then they are applied to the SAP ERP database without the need for manual data entry.

> **i** Note
>
> After an initial transmit, all screens are blank until you perform an *Add* or *Download* action for that screen. See the procedures Adding an Object [page 20] and Downloading an Object [page 23] for more information.

The material inventory cycle comprises three main steps:

- Retrieving or creating a material inventory physical document
- Entering the material inventory count
- Transmitting the inventory counts

A material inventory physical document contains the following information:

- The plant or storage location where the count is to take place
- Planned count date, or when the count is to take place
- Which materials are counted
- For material handled in batches, which batches are counted
- Which stock types are counted

To access inventory documents from the main landing page, tap the *Internal Process* icon. From the *Physical Inventory* tab, you can add or download physical or warehouse inventory. Or, you can select any of the other main tabs to work with other types of inventory processes.

SAP Inventory Manager with Warehouse Manager Enabled

When Warehouse Manager is enabled, inventory applies to individual bins rather than to storage locations.

10.2 Working with Warehouse Manager Enabled

In SAP ERP, a storage location can be warehouse managed or not. If it is warehouse managed, then the material is managed in storage bins inside your storage location.

When Warehouse Manager is enabled, SAP Inventory Manager provides flexible, automated support in processing all goods movements and in managing stocks in your warehouse complex. The system supports scheduled and efficient processing of all logistics processes within your warehouse. Warehouse Manager allows you to map your entire warehouse complex down to the storage bin level. Not only do you gain an overview of the entire quantity of material, you also determine exactly where a specific material is within your warehouse.

You can use Warehouse Manager to optimize the use of all of your storage bins and warehouse movements. You can also store material stocks from several plants together in warehouses with random storage. Warehouse Manager allows you to optimize the use of all storage bins, mix pallets belonging to several owners in randomly slotted warehouses, and still know exactly where a particular material is located within your warehouse complex.

Stock Bin-to-Bin Transfer

Stock bin-to-bin transfers are available when Warehouse Manager is enabled. You can use this feature when you want to move items from one bin to another within the same location. You can change the quantity and destination before you finalize the action.

Behavior Differences when Warehouse Manager is Enabled

When Warehouse Manager is enabled, there are a few differences in behavior in the SAP Inventory Manager application.

- **Inventory:** when Warehouse Manager is enabled, inventory applies to individual bins rather than overall physical material counts.
- **Material transfers:** with Warehouse Manager enabled, there are three types of transfers:
  - **Put away:** Use *Put Away* for stock that you have ordered and received and you are now ready to physically put away into the proper bin. When you specify a transfer with put away, you can change the quantity and the destination bin before you finalize the action.
  - **Bin to bin:** Use *Bin to Bin* when you are transferring items from one bin to another within the same location.
  - **Pick:** Use *Pick* when you want to fulfill a sales order. You can change the quantity but not the destination for this action.

10.3 Working with Stock Overview

Stock overview allows you to download the material inventory for storage locations, bins, or material ranges. Stock overview searches work for both the main Inventory Manager application and when Warehouse Manager is enabled.

Context

The fetched information is read-only. Follow the procedure to download your stock searches to your client:

Procedure

1. From the main application landing page, tap on *Internal Process*, if you are not already there.
2. Select the *Stock Overview* tab.
3. From the *Action* menu, tap on *Download Warehouse Stock* or *Download Inventory Stock*, whichever you need.
4. Select your field inputs from the Download Materials screen. The only mandatory field is the *Material From* field. Tap *Finish* when complete.

   You are returned to the Stock Overview screen with your results. If you are not satisfied with your results, tap the *Action* button and either *Download [Stock]* option again to retry.

10.4 Working with Material Transfers

Use material transfers to track material removed from storage in one location to place them in a different location. Material transfers can be scheduled either within one plant or between two separate plants.

With SAP Inventory Manager, you can track transfers from plant to plant. You can also track material transfers from storage location to storage location.

There are two ways that you can move your inventory from the *Internal Process* main screen. You can move it at the Inventory Manager level by using the *Stock Transfers* tab to move materials from one location to another. Or you can transfer orders at the warehouse level using the *Transfer Orders* tab.

Stock transfers at the warehouse level are done through transfer orders which allow you to specify the *to* and *from* storage bins. You create a transfer order as a request to move materials from one bin to another. Confirming the transfer order means that the move has physically taken place.

Initiating a *Stock Transfer* between locations reduces inventory at the issuing storage location and increases inventory at the receiving storage location. A stock transfer at a plant level does not change the stock level: only the stock distribution at the plant is changed.

Remember that transfer orders are bin to bin transfers at the warehouse level and stock transfers are good movement from one storage location to another.

With material transfers, you can:

- Add stock transfers to the device
- Add and download transfer orders to the device
- Edit transfer order header details to clarify the transfer or change the date before it is transferred to the SAP ERP back end.
- Discard, or clear, transfers from the list

Material Transfers with Warehouse Manager Enabled

You can move stock from one storage location to another even if one or both locations are warehouse managed. With Warehouse Manager enabled, there are three types of transfers:

- **Put away:** use Put Away for stock that you have ordered and received and you are now ready to physically put away into the proper bin. When you specify a transfer with put away, you can change the quantity and the destination bin before you finalize the action.
- **Bin to bin:** use Bin to Bin when you are transferring items from one bin to another within the same location. You can change the quantity and destination before you finalize the action.
- **Pick:** use Pick when you want to fulfill a sales order. You can change the quantity but not the destination for this action.

10.5 Working with the Consignment Stock Component

In consignment processing, the vendor provides materials and stores them on your premises. The vendor remains the legal owner of the material until you withdraw materials from the consignment stores. Only then does the vendor require payment.

The consignment invoice is due at set periods of time, for example, monthly. In addition, you can also arrange with the vendor that you take over ownership of the remaining consignment material after a certain amount of time. Such a stock, provided by the vendor and stored on your premises is called *consignment stock*.

The features of Consignment Stock in SAP Inventory Manager are as follows:

- The consignment stock is managed under the same number as your own stock. Consignment stock can, therefore, be transferred to the available stock.
- You can determine period-specific consignment prices.
- You can specify the consignment price in any unit of measure. The conversion factor is stored in the info record.
- Using consignment info records, you can use other condition functions used in purchasing, such as discounts and price/quantity scales.
- A consignment material can be allocated to one of three stock types:
    - Unrestricted use stock
    - Quality inspection stock

- Blocked stock

Consignment Stock supports only goods receipts from a purchase order and goods issue for a consignment fill up.

11 Working with Orders (Purchase Requisition)

11.1 Working with Purchase Requisitions

A purchase requisition is a request to Purchasing to procure a quantity of material or a service so that it is available at a certain point in time.

You create a purchase requisition when to give notification of requirements of materials or external services, as well as track these requirements. Purchase requisitions can be created either directly or indirectly:

- **Directly:** Someone from the requesting department enters a purchase requisition manually. The person creating the requisition determines what and how much to order, as well as the delivery date.
- **Indirectly:** The purchase requisition is initiated through another SAP component.

Access the Purchase Requisitions screen from the *Orders* icon on the main landing page. The Purchase Requisitions page is blank until you add your purchase requisitions to the page by tapping the *Add* icon.

From the main list, you can do the following:

- Add a new purchase requisition
- Select an item in the list and transmit the added purchase requisition to the SAP ERP back end.

For each selected purchase requisition, you can:

- Edit the purchase requisition
- Discard the purchase requisition
- Copy the purchase requisition
- Add an item to the selected purchase requisition

Purchase Requisition with Warehouse Manager Enabled

Purchase requisitions are functional when the Warehouse Manager feature is enabled.

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