

User Manual

This manual deals with the use of a successfully completed installation of COBI.wms. The target group are users of the app, as well as support staff.

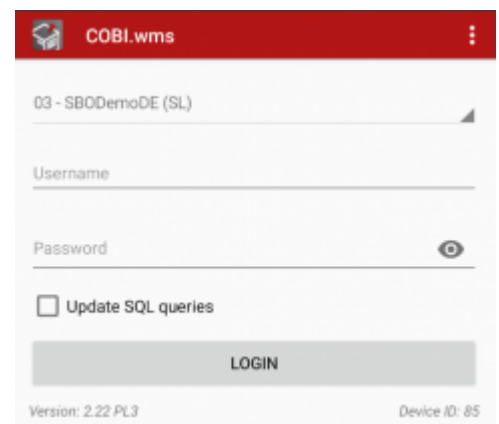
For details about installation and configuration, please see the main [COBI.wms Documentation](#) page.

Legend

The following conventions are used in this document:

- Regular buttons in the app's user interface are represented as following: [Button Title]
- Internal links within this page are used to help you navigate, for example: [Main Menu](#)
- Terms that refer to specific document types (e.g. Goods Receipt or Delivery), object types (e.g. Items and Resources), or other such concepts (e.g. Batch Numbers and Serial Numbers) are capitalized

Login



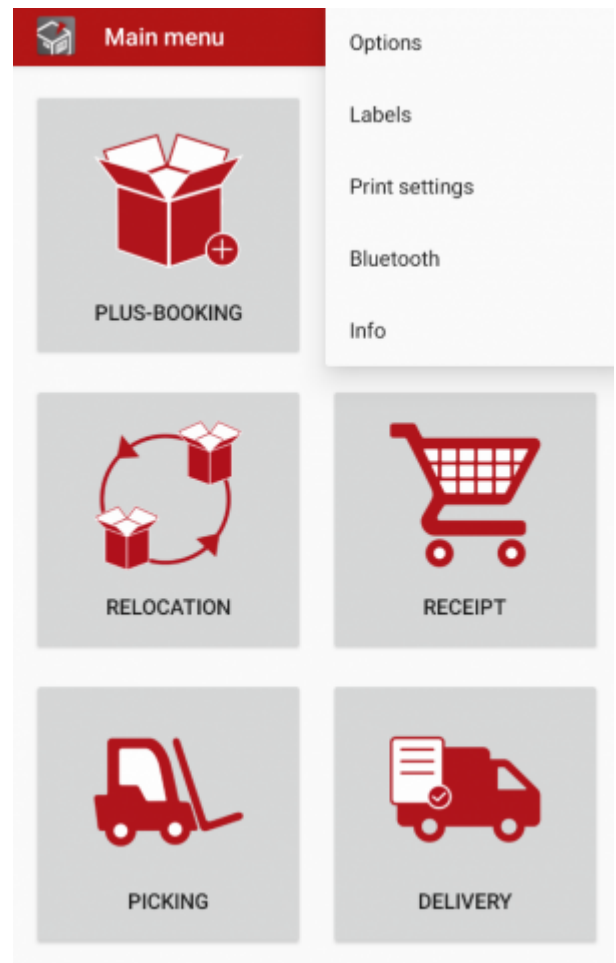
After starting the app, the login screen is displayed. Here, the company database to which the app should connect can be selected via drop-down.

Depending on the configuration of the app, the fields "Username" and "Password" may be displayed and may be optional or mandatory fields.

In the upper right corner there is a three-dot icon with the following items:

- [Management Database](#)
- [App Options](#)
- Info

Main Menu



In the main menu, the modules of the app are listed in the form of tiles.

A red dot on a tile means that there are locally stored data in the module which have not yet been sent to the database.

Through the three-dot symbol at the top right, the following screens can be accessed:

- [App Options](#)
- [Label Templates](#)
- [Print Settings](#)
- [Barcode scanning via Bluetooth](#)
- Info

Modules

Module	Equivalent in SAP Business One
Plus Booking	Warehouse Management → Inventory Transactions → Goods Receipt
Minus Booking	Warehouse Management → Inventory Transactions → Goods Issue
Relocation	Warehouse Management → Inventory Transactions → Inventory Transfer

Module	Equivalent in SAP Business One
Receipt	Purchase → Goods Receipt
Picking	Warehouse Management → Picking and Packing
Delivery	Sale → Delivery
Purchase Return	Purchase → Return
Sales Return	Sales → Return
Issue for Production	Production → Issue from Production
Receipt from Production	Production → Receipt from Production
Wares List	-
Purchase Order	Purchase → Order
Request for Relocation	Warehouse Management → Inventory Transactions → Request for Stock Transfer
Inventory Counting	Warehouse Management → Inventory Transactions → Inventory Count Transactions → Inventory Counting
Label Printing	-

Plus Booking

In SAP Business One: *Inventory → Inventory Transactions → Goods Receipt*

This module can be used to create manual goods receipts that are not linked to a specific business process, such as purchasing or production. A typical use case would be an inventory correction. For example, if there is more of an item in the warehouse than noted in SAP Business One, the quantity of the item can be increased.

When the module is opened, you can start creating the document directly. See section: [Document editing](#)

Minus Booking

In SAP Business One: *Inventory → Inventory Transactions → Goods Issue*

This module can be used to create manual goods issues that are not linked to a specific business process, such as sales or production. A typical use case would be an inventory correction. For example, if there is less of an item in the warehouse than noted in SAP Business One, the quantity of the item can be reduced.

When the module is opened, you can start creating the document directly. See section: [Document editing](#)

Relocation

In SAP Business One: *Inventory* → *Inventory Transactions* → *Inventory Transfer*

When the module is opened, it shows the list of open Inventory Transfer Requests.

When a Transfer Request is selected, a Relocation template is created with the open lines of the selected Request. For details on how to edit a Relocation template, see: [Document editing](#)

By long-pressing on a Transfer Request, the multi-selection mode is started. Additional Requests can be added to the selection via a simple click. Afterwards, by clicking on [New Relocation], a Relocation template is created with all open lines of the selected Requests.


If the button [New Relocation] is pressed without selecting Requests beforehand, an empty Relocation template is opened.

Receipt

In SAP Business One: *Purchasing - A/P* → *Goods Receipt PO*

When the module is opened, it shows the list of open Purchase Orders. The list can be filtered by using the Search field. Various search criteria are supported here, such as: document number, supplier, date, remarks, etc.

By clicking on the [...] button next to the search field, the list of Suppliers can be opened. After selecting one, the list of Purchase Orders is filtered according to the Supplier.

By clicking on the “History”-Icon  in the upper right corner, the last booked Goods Receipts can be displayed.

When a Purchase Order is selected, a Receipt template is created with the open lines of the Order. For details on how to edit a Receipt, see: [Document editing](#).

By long-pressing on a Purchase Order, the multi-selection mode is started. Further Orders can be added to the selection through a simple click. (The selected Orders must be based on the same Supplier.) Afterwards, by clicking on [New Receipt], a Receipt template is created with all open lines of the selected Purchase Orders.

If the [New Receipt] button is pressed without first selecting any Purchase Orders, a Supplier must be selected, and a blank Receipt template is opened.

When adding new lines to a Receipt, matching Purchase Orders are displayed if available. By selecting one, it can be linked as the base document for the Receipt. Thus, to complete a Purchase Order, it is not necessary to search for it in the whole list of open Orders first. Instead, it is possible to simply select the Supplier from which goods have been received, and start scanning their barcodes, after which the matching Order will be automatically suggested for linking.

Picking



In SAP Business One: *Inventory* → *Pick and Pack*

With this module, you can edit released Pick Lists.

The module provides three views: [Open], [Released], and [Done].

When the module is opened, you are initially in the **[Released]** view.

Open

After selecting [Open], all open Sales Orders that have not yet been released to a Pick List are displayed.

By selecting a Sales Order, its contents can be viewed. Editing is not possible from here. To start picking for the Sales Order, it must first be released to a Pick List in SAP Business One.

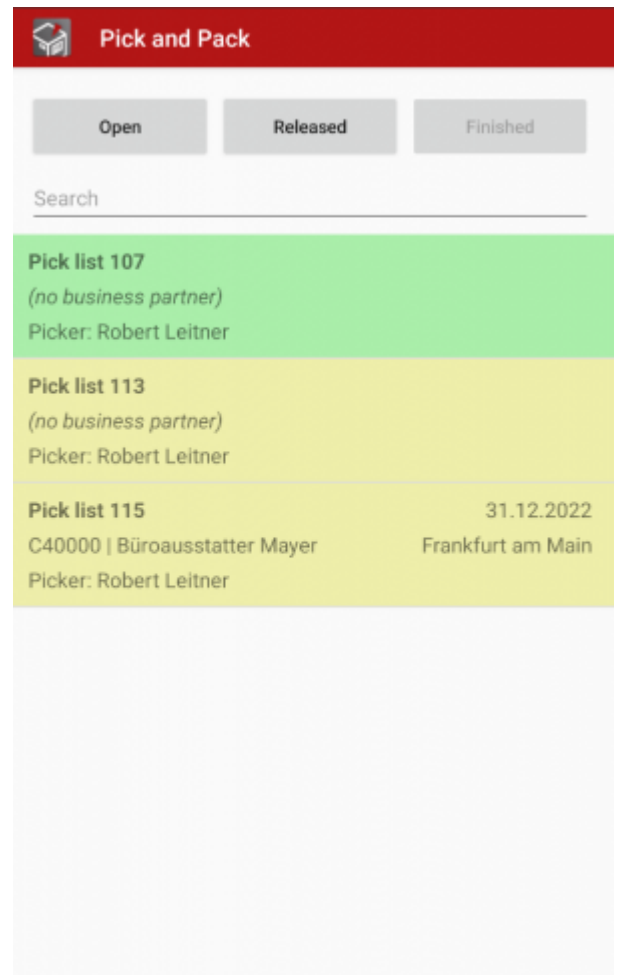
Released

After selecting [Released], all released Pick Lists that have not yet been completed are displayed.

A red dot next to the pick list number means that the list has been edited, but the changes not yet synchronized to the database. By long-pressing on such a list, the locally saved changes can be discarded.

By selecting a Pick List, you can view and edit its contents. See section: [Pick List editing](#)

Done



After selecting [Done], you will see all Pick Lists which are partially or completely picked.

When you select a Pick List, you will be offered the options *Open pick list* and *Create delivery note*.

By selecting *Open pick list*, you can view and edit the contents of the List. See section: [Pick List editing](#)

If you select *Create delivery note*, the Pick List is transferred into the [Delivery](#) module. Generally, no further processing is required in this screen before proceeding, because the information about picked quantities, Batch and Serial Numbers, as well as Bin Locations, will be copied from the Pick List.

Done / Multi-selection for Delivery

By long-pressing on a Pick List, you can start the multi-selection mode and will see the actions **Automatic** and **Manual** appear at the top. Additional Pick Lists can be added to the selection

through a simple click.

If you click **Automatic**, all necessary Deliveries will be created to cover the selected Pick Lists. If there are Orders for multiple Customers among the selection, one Delivery will be created per Customer.

If you click **Manual**, and the Pick Lists relate to several Customers, they will be listed for selection. A Delivery template will be created for the selected Customer.

Pick List editing

To find a specific item in long Pick Lists, the item can be entered in the *Search* field, or found via barcode scan.

By selecting **Hide fully picked lines**, you can filter out all lines that are already picked from your view.

By long-pressing on a line, further details are displayed: Order Number, Customer, Shipping date, and Shipment address.

By clicking on a line, it can be edited. Depending on whether it is an item with Batch Numbers, Serial Numbers, or both, and depending on whether Bin Locations are activated, the workflow will vary.

If no Batch Numbers, Serial Numbers, or Bin Locations have to be selected, a simple dialog will appear for entering the picked quantity. Otherwise, a corresponding screen for selecting the Batch or Serial Numbers or Bin Locations will be displayed. See section: [Document editing](#)

By clicking [Send], the edited Pick List will be synchronized to the database.

Delivery

In SAP Business One: *Sales - A/R → Delivery*

When the module is opened, it shows the list of open Sales Orders (OR) and Reserve Invoices (IN). The list can be filtered by using the Search field. Various search criteria are supported here, such as: document number, customer, date, remarks, etc.

By clicking on the [...] button next to the search field, the list of Customers can be opened. After selecting one, the list of Orders and Invoices is filtered according to the Customer.

Via the "History"-Icon  in the upper right corner, the last booked Deliveries can be displayed.

When a document is selected, a Delivery template is created with the open lines of the selected document. For details on editing a Delivery template, see: [Document editing](#)

By long-pressing on a document, the multi-selection mode is started. Additional documents can be added to the selection through a simple click. (The selected documents must be based on the same Customer.) Afterwards, by clicking on [Create Delivery], a Delivery template is created with all

open lines of the selected documents.

If the [Create Delivery] button is pressed without first selecting any documents, a Customer must be selected, and an empty Delivery template is opened.

Purchase Return

In SAP Business One: *Purchasing - A/P → Goods Return*

When the module is opened, it shows the list of open Goods Return Requests.

When a Return Request is selected, a Purchase Return template is created with the open lines of the selected Request. For details on how to edit a Return template, see: [Document editing](#)

By long-pressing on a Return Request, the multi-selection mode is started. Additional Requests can be added to the selection through a simple click. (The selected Requests must be for the same Supplier.) Afterwards, by clicking on [New Purchase Return], a Return template is created with all open lines of the selected Requests.

If the [New Purchase Return] button is pressed without first selecting any Requests, a Supplier must be selected, and a blank Return template is opened.

Sales Return

In SAP Business One: *Sales - A/R → Return*

When the module is opened, it shows the list of open Return Requests.

When a Return Request is selected, a Sales Return template is created with the open lines of the selected Request. For details on how to edit a Return template, see: [Document editing](#)

By long-pressing on a Return Request, the multi-selection mode is started. Additional Requests can be added to the selection through a simple click. (The selected Requests must be from the same Customer.) Afterwards, by clicking on [New Sales Return], a Return template is created with all open lines of the selected Requests.

If the [New Sales Return] button is pressed without first selecting any Requests, a Customer must be selected, and a blank Return template is opened.

Issue for Production

In SAP Business One: *Production → Issue for Production*

When the module is opened, it lists all Production Orders which are in the *Released* state and have at least one component line whose *Issue Method* is set to *Manual*. In addition, open Disassembly Orders are displayed.

When a Production Order is selected, an Issue for Production template is created with all component lines whose *Issue Method* is set to *Manual*. For a Disassembly Order, a single line with the item to be disassembled is displayed instead.

For details on editing an Issue for Production, see: [Document editing](#)

Receipt from Production

In SAP Business One: *Production* → *Receipt from Prodction*

When the module is opened, it lists all Production Orders which are in the *Released* state. In addition, it lists all Disassembly Orders which are in the *Released* state and have at least one component line whose *Issue Method* is set to *Manual*.

When a Production Order is selected, a Receipt from Production template is created, containing a single line with the item to be produced. For a Disassembly Order, all component lines whose *Issue Method* is set to *Manual* are listed instead.

If any produced goods are discarded during production, the button [Add discarded quantity] can be used to add an additional line to the document which represents the quantity that was produced but discarded.

If some of the components that were issued manually for the Order have been received back from production (e.g. a remaining quantity of a consumable), the button [Add remaining quantity] can be used to add an additional line representing the remaining quantity that will be added back to stock.

During the completion of a Receipt from Production, the **Close order** checkbox can be checked to close the Order after the booking.

For details on editing a Receipt from Production, see: [Document editing](#)

Wares List

When the module is opened, it will display the list of all Warehouses.

By selecting a Warehouse, you can see the list of all items in it. For each item, you can see the quantities: *On Hand*, *Committed*, *Ordered*, and *Available*.

If an item is selected that is managed by Batch or Serial Numbers, the Batches or Serials will be listed. If you are in a warehouse with Bin Locations, the allocation of quantities to individual bins can be seen as well.

Purchase Order

In SAP Business One: *Purchasing - A/P → Purchase Order*

This module can be used to create Purchase Orders in SAP Business One, which will then also appear in the *Receipt* module.

It should be noted that no Batch Numbers, Serial Numbers, or Bin Locations can be specified in this module, since you are creating a Purchase Order. Only the warehouse for which the Order is placed, and the quantity to be ordered, are entered in this module.

When the module is opened, you can start creating the document directly. See section: [Document editing](#)

Relocation Request

In SAP Business One: *Inventory → Inventory Transactions → Inventory Transfer Request*

This module can be used to create Inventory Transfer Requests in SAP Business One, which will then also appear in the *Relocation* module.

In this module, no assignment of Batch Numbers, Serial Numbers or Bin Locations is supported.

When the module is opened, you can start creating the document directly. See section: [Document editing](#)

Inventory Counting

In SAP Business One: *Inventory → Inventory Transactions → Inventory Counting Transactions → Inventory Counting*

This module allows editing Inventory Counting Lists created in SAP Business One. When the module is opened, it shows the list of open Inventory Counting Lists.

A red dot next to the list number means that there are changes to the Counting List that are stored locally on the Android device and not yet synchronized to the database. By long-pressing on such a List, the locally saved changes can be discarded.

After selecting a Counting List, its contents are displayed. The **Hide counted** checkbox can be checked to filter the list to those lines which have not yet been counted. Items can be found by using the Search field or via barcode scanning. Additional lines can be added to the List by clicking [Add item] or by scanning a barcode for an Item that is not yet in the List.

For Items that are managed neither by Batch nor Serial Numbers, separate quantities can nevertheless be added during counting, each with an optional remark. For example, a quantity of 10

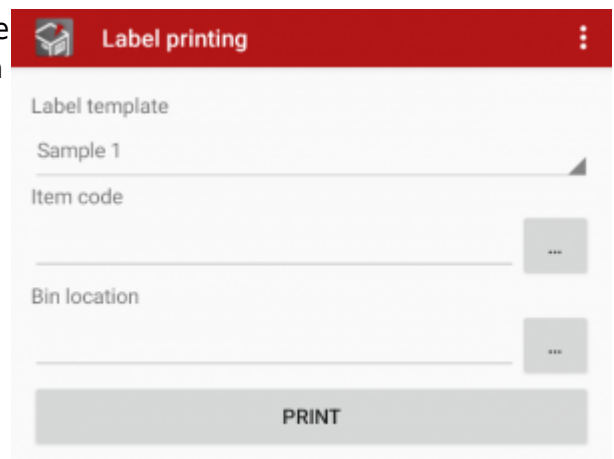
with the remark “Shelf 1” and an additional quantity of 15 with the remark “Shelf 2” could be added to a line. However, when synchronizing to the database, this split into different quantities, including the corresponding remarks, will be lost. The quantities will be summed into a single quantity, because in SAP Business One only one quantity can be stored per line. If a persistent, detailed division of quantities is desired, Bin Locations should be activated for the Warehouse.

Unlike in other modules, only one Bin Location can be selected per line in Inventory Counting. If an Item is divided into several Bin Locations, one line per Bin Location must be added to the Counting List.

By clicking on [Send], the state of the Counting List currently visible on the device is synchronized to the database. Subsequently, an Inventory Posting can be booked in SAP Business One based on the Inventory Counting.

Label Printing

With this module, the [Label Templates](#) imported into the app can be used to print wares labels. For this to work, a network-compatible printer must be defined in the [Print Settings](#).



The required Template can be selected via the upper drop-down list.

After selecting the Item and other optional entries, the print can be initiated with the [Print] button.

Document editing

This section explains the general process of creating, editing, and booking documents with the app. These instructions apply to many modules.

Document Lines

The document lines screen lists the lines of a document and optionally allows for adding additional lines.

If you enter this screen by selecting an existing document (for example, selecting a Purchase Order in the [Receipt](#) module), the screen will be pre-filled with the lines of the base document and you will mainly just have to add quantities to the existing lines.

If you create a document manually (e.g. in [Plus Booking](#), or a Receipt without a Purchase Order), the screen will be initially empty and you will have to add lines to the document manually.

From this screen, barcodes can be scanned directly, which leads to the *Add quantity* screen. (See below.) If a [GS1 Barcode](#) is scanned, any fields such as Batch Number, Expiration Date, etc. will be automatically filled within the screen that opens.

The [Add item] button opens the list of all active Items. By entering various criteria into the Search field at the top (such as Item number, name, etc.) the list can be filtered. After selecting an Item, the *Add quantity* screen will be opened.

Clicking on the "Camera" icon at the top right opens the *Photos* screen. Here, images can be chosen from the Android gallery, or new photos can be captured. These will be added as attachments to the document that is being edited. (Attachments for Pick Lists are linked to the underlying document instead, since Pick Lists cannot have attachments in SAP Business One).

Clicking on an existing line usually displays a selection of possible actions. (As an exception to this, a direct action is performed in the Picking module: Depending on the Item and Warehouse settings, either the *Change quantity* dialog, the Batch Numbers screen, the Serial Numbers screen, or the Bin Locations screen will appear. By long-pressing on the line, the other possible actions can be called up explicitly.)

The possible line actions follow.

Add quantity

This opens the *Add quantity* screen (see below) with the Item linked to the selected line. If a quantity has already been added to the selected line, the Warehouse cannot be changed. Otherwise, when a quantity is being added to the line for the first time, the Warehouse can be changed in the *Add quantity* screen.

Change quantity

This opens a dialog where you can simply change the quantity (incl. Unit of Measurement) for the line. This option is only available under the following conditions:

- The item has no Batch or Serial Numbers and the Warehouse has no Bin Locations.
- Only one Batch Number / only one Bin Location has been defined for the line.

Batch numbers

This opens the Batch Numbers screen, where the allocation of Batch Numbers can be viewed and edited.

In the upper section of the screen, there are input fields similar to the *Add quantity* screen (see below), which let you add additional Batch Numbers to the allocation. (If the specified Batch Number already exists in the allocation, the specified quantity will be added to it.)

In the section below, you can see the current Batch allocation of the line. By clicking on a Batch Number, the allocated quantity can be adjusted, or the Batch Number can be removed from the allocation.

If Bin Locations are enabled for the Warehouse, an allocation to Bin Locations must in turn be defined per Batch Number. See section *Bin locations* below.

Serial numbers

This opens the Serial Numbers screen, where the allocation Serial Numbers can be viewed and edited.

In the upper section of the screen, there are entry fields similar to the *Add quantity* screen (see below), which let you add additional Serial Numbers.

In the lower section of the screen, you can see the list of already added Serial Numbers. By long-pressing on a Serial Number, you can select it for deletion. More Serial Numbers can be added to the selection if you want to delete several at once.

Bin locations

This opens the Bin Locations screen, where the allocation of Bin Locations can be viewed and edited.

In the upper section of the screen, there are input fields similar to the *Add quantity* screen (see below), which let you add additional Bin Locations to the allocation. (If the specified Bin Location already exists in the allocation, the specified quantity will be added to it.)

In the lower section of the screen, you can see the current Bin allocation. By clicking on a Bin, the allocated quantity can be adjusted, or the Bin can be removed from the allocation.

Print label

This action triggers a label print for the Item of this line.

If multiple Batch Numbers or Serial Numbers have been added to the line, one of them must be selected, since each wares label can only refer to one Batch Number or Serial Number. If multiple Bin Locations are specified, one of them must also be selected for printing.

Delete

This removes the line from the document.

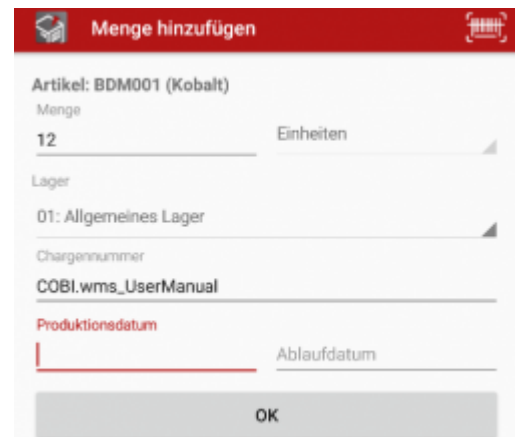
Add Quantity

The *Add quantity* screen allows the entry of a quantity, Unit of Measurement, Batch Number or Serial Numbers, depending on the Item in question. If necessary, the Warehouse to which the quantity is being added can be changed from a drop-down.

If a Warehouse is selected in which Bin Locations are enabled, a Bin Location must also be specified. The Bin can be entered via barcode scan, or manually. By clicking on the [...] button next to the Bin Location field, the list of Bins in the Warehouse can be opened to select one manually.

In the lower section of the screen, you can see the current stock of the Item in question, divided by Warehouse and Bin Location.

Batch Number

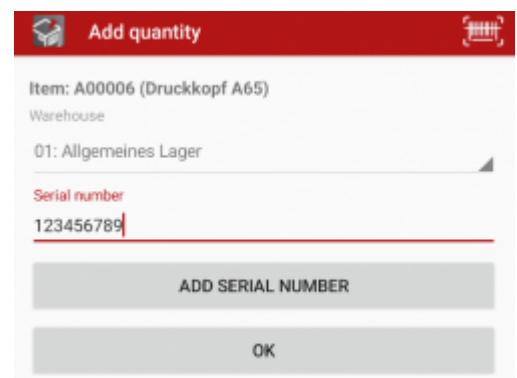


The screenshot shows the 'Menge hinzufügen' (Add Quantity) screen. The header is red with a white icon of a box and the text 'Menge hinzufügen'. Below the header, the article name 'Artikel: BDM001 (Kobalt)' is displayed. The 'Menge' (Quantity) field contains '12' and the 'Einheiten' (Units) field is empty. The 'Lager' (Warehouse) field shows '01: Allgemeines Lager'. The 'Chargennummer' (Batch Number) field contains 'COBI.wms_UserManual'. The 'Produktionsdatum' (Production Date) and 'Ablaufdatum' (Expiry Date) fields are empty. An 'OK' button is located at the bottom of the screen.

If the Item is managed by Batches, the Batch Number can be entered via barcode scan or manually. For outbound bookings (e.g. Minus Booking, Delivery, etc.), the [...] button next to the *Batch number* field can also be used to open the list of available Batches in order to select one.

For inbound bookings (e.g. Plus Booking, Goods Receipt), a Production Date and Expiry Date can also be entered when entering the Batch Number. If activated under the [App Options](#), further detail fields for the Batch Number can also be displayed.

Serial Numbers



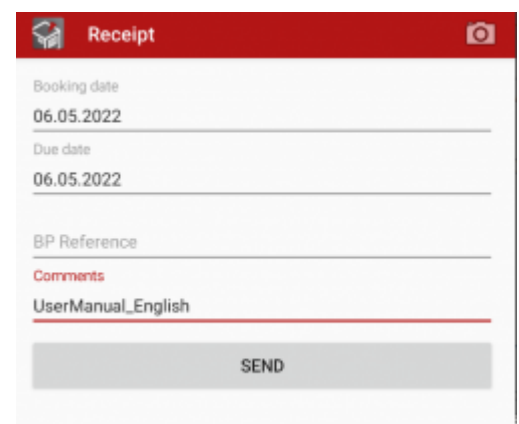
The screenshot shows the 'Add quantity' screen. The header is red with a white icon of a box and the text 'Add quantity'. Below the header, the item name 'Item: A00006 (Druckkopf A65)' is displayed. The 'Warehouse' field shows '01: Allgemeines Lager'. The 'Serial number' field contains '123456789'. An 'ADD SERIAL NUMBER' button is located below the serial number field, and an 'OK' button is at the bottom of the screen.

If the Item is managed by Serials, it is not possible to specify a quantity or Unit of Measurement, since the list of Serial Numbers implicitly forms the quantity.

Serial Numbers can be entered via barcode scan or manually. For outbound bookings (e.g. Minus Booking, Delivery), the button next to the *Serial number* field can be used to open the list of available Serials in order to select one.

For inbound bookings (e.g. Plus Booking, Goods Receipt), further details can be specified per Serial Number, such as its Lot Number. In the [App Options](#), further detail fields for Serial Numbers can also be activated.

Booking



After the editing of lines is complete, the [Next] button will take you to the final booking screen.

Here you can specify additional information about the document to be booked, that is independent of the individual lines. The available fields depend on the document type.

By clicking on [Send], the document is immediately posted to *SAP Business One* and booked.

Overview of booked document

After a successful booking, a final overview of the booked document appears.

By clicking on a line, label printing can be triggered for the corresponding Item.

By clicking on the “Printer” icon in the upper right corner, a print command for the entire document can be initiated, if this was configured correctly in the [Print Settings](#).

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