



# ProcessForce User's Guide

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Version: 2

Date: 2018.06.22

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Exported on 2018-10-17,

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# How to Guide – Activities for ProcessForce Documents

## Overview

SAP Business One Activities can be used on ProcessForce documents. Activity in SAP Business One refers to recording or reminding interactions between an enterprise and its business partners, such as task, meeting or phone call.

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## 1.1 Manufacturing Orders

### 1.1.1 Create an Activity

- To create an activity for a manufacturing order, select the Create Activity menu option:

The screenshot shows the SAP Business One Manufacturing Order form. The 'Items' table is visible, and a context menu is open over it. The 'New Activity' option is highlighted with a red circle.

#	Sequence	Item Code	Origin	Desc
1	10	Bottle-01	BOM	Bottl
2	20	Label-01	BOM	Label
3	30	Top-01	BOM	Top
4	40	Active-Item-01	Phantom	Activ
5	50	Active-Item-02	Phantom	Activ
6	60	Non-Active-01	Phantom	Non-
7	70	Non-Active-02	Phantom	Non-
8	0		BOM	

Context Menu Options:

- What's this?
- Issues and Receipts
- Recalculate Lead Time
- Recording Time
- Quality Control
- Subcontracting
- Reports
- Duplicate
- Time and Cost Details
- Create Semi-finished Products
- Open Operation Bind Form
- New Activity**
- Operation Relation Map

- The Activity form opens



- Add a BP Code to the activity

### Internal Business Partner Code

To use Activities related to Manufacturing Order it is required to create an internal or dummy Business Partner Code

- Note: The document type and document number are copied into the activity form

The screenshot shows two overlapping SAP forms. The top form is the 'Manufacturing Order' form, and the bottom form is the 'Activity' form. In the Manufacturing Order form, the 'Document Number' field contains the value '32'. In the Activity form, the 'Document Number' field also contains the value '32'. A red circle highlights the '32' in the Manufacturing Order form, and another red circle highlights the '32' in the Activity form. A red arrow points from the Manufacturing Order document number to the Activity document number, indicating that the document number is copied from the Manufacturing Order to the Activity form.

### Manufacturing Order Activity Report

- Select the Reports menu and click Related Activities:

The screenshot shows the SAP Manufacturing Order Activity Report. The 'Items' table is visible, and a context menu is open over it. The 'Related Activities' option is highlighted with a red circle. The context menu includes options such as 'Issues and Receipts', 'Recalculate Lead Time', 'Recording Time', 'Quality Control', 'Subcontracting', 'Reports', 'Duplicate', 'Time and Cost Details', 'Create Semi-finished Products', 'Open Operation Bind Form', 'New Activity', and 'Operation Relation Map'. The 'Related Activities' option is the one that is highlighted.

- All related Activities are displayed within the Activity Report.

## 1.2 Complaints

- To create an Activity for a Complaint, select New Activity menu option (to check Activities already related to this Complaint, click Related Activities):

The screenshot shows a 'Complaint' form with the following fields and values:

Field	Value
Series	Supplier 4
Complaint Type	Supplier
Business Partner Code	00001
Business Partner Name	ABC Inc
Contact Person	
Warehouse Code	
Project Code	
Status	Started
Created Date	05.04.18
Started Date	05.04.18
On-Hold Date	
Closed Date	
Originator	
Owner	

The 'Batch / Serial No.' table has the following data:

#	Batch	Manufacturing Serial No.	Serial Num...
1			

The context menu options are: New Activity, Related Activities, Remove, and Close. The 'New Activity' option is highlighted by a red circle and a tooltip that says 'What's this?'.

- The Activity form opens
- The BP Code from the Complaint is automatically added
- Within the linked document tab, the Document Type and Document Number from the Complaint are copied (the same way it is done for Manufacturing Order - see example above).

## 1.3 Quality Control

### 1.3.1 QC test with no BP Code

- The option is available from document's tables, not header (as it is in previous document types)
- The Quality Control Test document type and number are copied into the Linked Documents Tab

## 1.3.2 QC test with BP Code

- As in previous documents navigate in the same way to create an Activity
- When a QC test includes the BP Code for example a test for Goods Receipt PO the BP Code is copied into the Activity

The image shows two overlapping software windows. The 'Quality Control Test' window on the left has a 'Transaction' tab selected, showing 'Transaction Type' as 'Purchasing: Goods Receipt PO' and 'Business Partner Code' as '00001'. The 'Activity' window on the right has a 'General' tab selected, showing 'Activity' as 'Phone Call', 'Number' as '3', 'BP Code' as '00001', and 'BP Name' as 'ABC Inc'. A red arrow points from the '00001' in the QC test window to the '00001' in the Activity window. The 'Quality Control Test' window also has a 'Batches' table with columns '# Batch' and '# Manufacturing Serial No.', and a 'Serial Numbers' table with columns '# Manufacturing Serial No.' and '# Manufacturing Serial No.'. The 'Activity' window has a 'Linked Document' tab and an 'Attachments' tab, with 'Document Type' set to 'QC Test' and 'Document Number' set to '1'.

#	Batch	#	Manufacturing Serial No.
1	2012-04-18-5	1	
2			

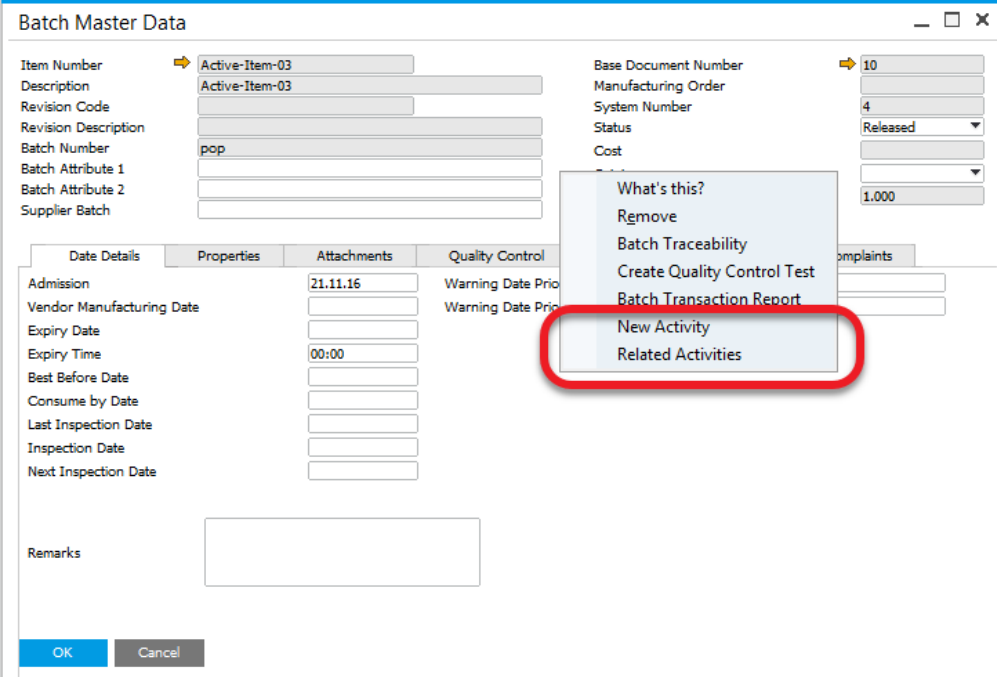
## 1.4 Non-Conforming Materials Report

- As in previous documents navigate in the same way to create an Activity
- The QC test document number is copied into the Linked Documents Tab

## 1.5 Batch Master Data form

### 1.5.1 Create an Activity

- To create an Activity for Batch Master Data, right-click within the Additional Batch Details form and choose the New Activity option (to check Activities already related to this Batch, click Related Activities).



The screenshot displays the 'Batch Master Data' form. The form is divided into several sections: 'Item Number' (Active-Item-03), 'Description' (Active-Item-03), 'Revision Code', 'Revision Description', 'Batch Number' (pop), 'Batch Attribute 1', 'Batch Attribute 2', and 'Supplier Batch'. On the right side, there are fields for 'Base Document Number' (10), 'Manufacturing Order', 'System Number' (4), 'Status' (Released), and 'Cost' (1.000). Below these fields, there are tabs for 'Date Details', 'Properties', 'Attachments', and 'Quality Control'. The 'Date Details' tab is active, showing fields for 'Admission' (21.11.16), 'Vendor Manufacturing Date', 'Expiry Date', 'Expiry Time' (00:00), 'Best Before Date', 'Consume by Date', 'Last Inspection Date', 'Inspection Date', and 'Next Inspection Date'. A 'Remarks' field is also present. A right-click context menu is open over the 'Attachments' tab, with the 'New Activity' option highlighted in a red circle. Other options in the menu include 'What's this?', 'Remove', 'Batch Traceability', 'Create Quality Control Test', 'Batch Transaction Report', and 'Related Activities'. At the bottom of the form, there are 'OK' and 'Cancel' buttons.

- The Activity form opens.
- Add a BP Code to the activity.
- Note: The document type is set to Batch Master Data and the batch number is copied in the Document Number field in the Linked Documents tab.



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