



CUSTOMER
SUCCESS
SUMMIT
2025

Customer Spotlight: Atlanta Dental Supply



Automation in SAP B1:

Inventory Allocation, Order Fulfillment, and Warehouse
Replenishment

Background Information

- Orders fulfilled from 2 main warehouses. One in Georgia and one in Virginia.
- Most orders are shipped the same day they are placed.
- Many items can be drop-shipped directly from the vendor if necessary.
- Customers are assigned a default warehouse for their orders to ship from depending on location.
- Atlanta Dental has 50+ Service Technicians with vans across the country. Each van is a warehouse in SAP.
- Been Live on SAP Business One for a little over 3 years.

Summary of Problems: Pre-SAP B1

- Most processes were extremely manual and involved someone touching the Sales Order at almost every step of the order fulfillment process. This caused human error and longer processing times.
- Processes were reliant on one individual's knowledge and action instead of a logical, automated process. Different people do the same task a little differently which can lead to slight variations in the data that gets reported on. Or the task doesn't get done all together.
- All of this caused higher processing costs and longer processing times. This left customers waiting for goods, and these goods ultimately cost Atlanta Dental more money to ship.

Inventory Allocation

- When an order comes in, inventory is automatically allocated on a first come, first serve basis.
- Orders with High Demand Low Stock Items (limited by manufacturer supply) are automatically put on hold, and an email alert is sent to customer service so that they can allocate those items as needed.
- Items on Backorder are flagged on the Sales Order line. This makes reporting easier and allows for a more controlled release of these items.

Problems Solved: Pre-SAP B1

- Inventory had to be manually allocated to each order for certain backordered items.
- Backordered items would ship individually causing higher shipping costs.
- Limited historic traceability for backordered items.

Order Fulfillment

- If an item is in stock in one warehouse but not the other, the warehouse on the Sales Order line will automatically flip to fulfill from the warehouse that has stock (even double flips).
- If an order is out of stock in both warehouses, and deemed eligible for Drop-Shipping, a PO will automatically be created and linked to the Sales Order line (just like the Procurement Wizard) and that PO is automatically sent to the Vendor either through EDI or email depending upon Business Partner Configuration.
- Pick tickets are automatically generated based on inventory allocation and picked up by the integrated WMS system.
- Backordered items have their pick ticket automatically generated the morning after they are received to allow ample time for receiving to put them in the correct bin location.

Example: Before

Sales Order

Customer: 1010429
 Name: Brayton's Pearly Whites
 Contact Person: [Dropdown]
 Customer Ref. No.: [Dropdown]
 Service Level: Silver

Search for Customers
 Search for Orders
 Search By Item
 Sales History

Monthly Totals

Price Override ALL Line: [Dropdown]

Contents | Logistics | Accounting | Attachments (0) | Pop-up Notes

#	Type	Item No.	Item Description	Mfr No.	Whse	Quantity	Open Qty	CUSTOMER PRICE	Total (LC)	Flip Date	Backordered	Qty in Whse	Qty. CO.	PURCHASE ORDER
1		006545100	ADVANCE NITRILE GLOVES 2.7 COBALT SMALL BOX 300	45100	4100	1	1	\$ 15.99	\$ 15.99		N	9,845	10,337	
2		006546100	ADVANCE NITRILE GLOVES 3.2 BLUE SMALL BOX 200	46100	4100	1	1	\$ 11.83	\$ 11.83		N	6,893	7,932	
3		0065AD00810	ADVANCE SUTURE 3-0 PLAIN 27 3/8 C-7 NEEDLE DZ (553B)	AD00810	4100	1	1	\$ 32.28	\$ 32.28		N		37	
4		000101-220	AMALGAM PLUGGER #1/2 BLACK SERRATED	01-220	4100	1	1	\$ 14.16	\$ 14.16		N			
5		003334061-6	Hose O2 Diss X Diss 6Ft.	34061-6	4100	1	1	\$ 107.69	\$ 107.69		N			
6											N			

No. Primary: 40369333
 Status: Open
 Posting Date: 10/24/25
 Delivery Date: 10/24/25
 Document Date: 10/24/25
 Order Type: Merchandise - Duluth
 Set Whse on ALL line: [Dropdown]
 ECOM Suspend: No
 Source Doc No.: [Dropdown]
 Order Source: ECOM

Summary Type: No Summary

Total Before Discount: \$ 181.95
 Freight / Tax: [Dropdown]
 Add Freight: [Dropdown] Override Freight: [Dropdown]
 Total: \$ 181.95
 GP %: 0.000
 Calculate Order GP

Sales Employee: House Accts - GA
 Owner: [Dropdown]
 Equipment Specialist: [Dropdown] Install Required:
 Taker: [Dropdown]
 Exempt sales rep from paying shipping on C23 order
 Hu-friedy/Meisinger EDI Hold
 Auto Email PO?

Remarks: [Text Area]

OK Add Draft & New Cancel

Recalculate Price From GP%

Copy From Copy To

Example: After

Sales Order

Customer: 1010429
 Name: Brayton's Pearly Whites
 Contact Person: [Dropdown]
 Customer Ref. No.: [Dropdown]
 Service Level: Silver

Search for Customers
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 Add Freight: [Dropdown]
 Total: \$ 181.95
 GP %: 0.000
 Calculate Order GP

OK | Add Draft & New | Cancel

Recalculate Price From GP%

Copy From | Copy To

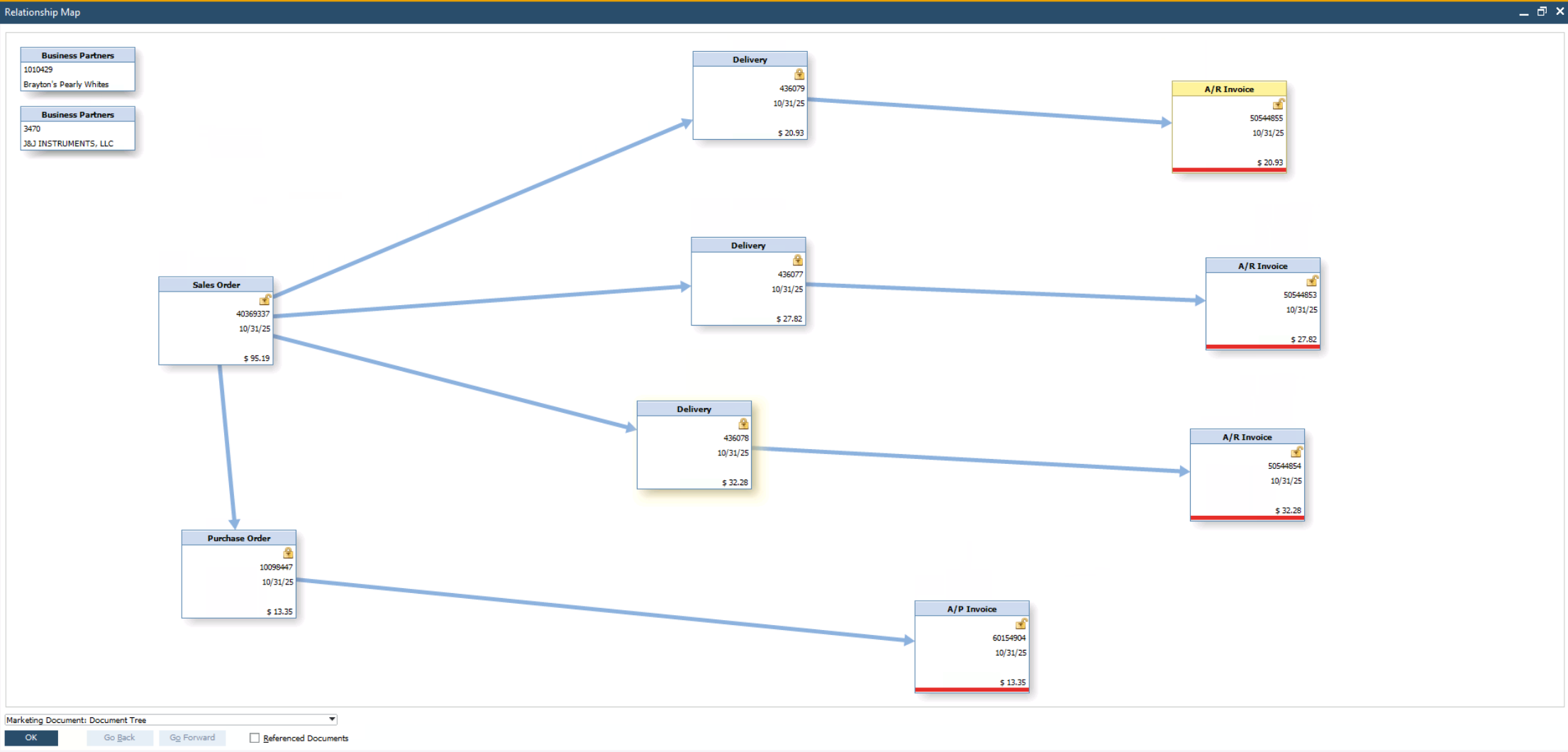
Problems Solved: Pre-SAP B1

- Items would only flip warehouses when someone noticed there was stock in the other warehouse and manually changed it. This could be days or even a week later.
- This not only delayed the customer receiving their goods but would sometimes cause purchasing to order extra thinking they needed to fulfill that item on that order.
- Dropships were handled by an employee reviewing a daily backorder report each afternoon and manually creating dropship PO's. This led to human error and often took up someone's whole afternoon.

Order Fulfillment

- Once picked, the WMS system creates the Delivery in SAP from the Pick Ticket (via Service Layer integration) and the Delivery is automatically copied to an A/R Invoice with tax via the Avatax Web UI using real-time tax data.
- For dropships, the Vendor emails the A/P Invoice for the drop-shipped item to Atlanta Dental. The invoice is picked up by Conexiom and inserted into the “Data Dock” (UDO holding place) via our API integration.
- Assuming the A/P Invoice matches the PO, the A/P Invoice and A/R Invoice are automatically generated for the drop-ship item.

Relationship Map:



Problems Solved: Pre-SAP B1

- Tax schedules and rates were maintained manually in the legacy system. This led to outdated information and time-consuming updates. Invoices had to be created manually, and tax issues were often only noticed when a customer would point them out.
- When receiving a DS Invoice from the vendor, an employee would need to manually create both an A/P and an A/R invoice. This was not only labor intensive but also led to human errors. Sometimes the A/R Invoice would be forgotten all together and never get created.

Warehouse Replenishment

- Tech's used to send an email to an office employee requesting additional truck stock items. This employee would manually create Purchase Orders or Inventory Transfers to the technician.
- Now we have added Min's and Max's to those truck stock items and created a bi-monthly automatic process that creates Inventory Transfers Requests or Purchase Orders to each technician. The ITR's have pick lists generated by the previously mentioned allocation process and the PO's are automatically sent to the vendor (email or EDI).
- After all documents are created, an email is sent to each tech with a summary of the items and quantities on the way.
- This reduces the number of Purchase Orders and Inventory Transfers that need to be manually processed by the office staff.

Email Example

Truck Stock Report Tech - 1560

Sunday, October 26, 2025 at 6:00 AM

B [Redacted]

To: [Redacted]

Type	DocNum	DocDate	ItemCode	Dscription	Qty	WhsCode
Transfer	20003269	10/8/2025	5382RPT501	SPANNER WRENCH DOUBLE ENDED .	1.00	4155
Transfer	20003293	10/15/2025	000633-0009-04	VALVE 2-WAY MOM. SRF TOGGLE .	3.00	4155
Transfer	20003293	10/15/2025	000682-0305-04	3 WAY TOGGLE 3 PORT .	3.00	4155
PO	10099137	10/16/2025	000677-0332-01	Level,Base,Tray HLDR,White2	1.00	4155

Problems Solved: Pre-SAP B1

- Tech Van replenishments used to be processed daily. This caused increased shipping costs and left office staff in a constant state of creating Transfers and Purchase Orders.
- Technicians would send vague emails requesting parts which required expertise and time from office staff to research the actual part they needed.
- Min's and Max's allow for more control over Technician inventory to ensure they don't have too much or too little.