Microsoft Dynamics 365
SALES & SHIPPING – SALES ORDER PACK

This application is used to pack and ship items listed in a Sales Order Pick ticket from inventory. Picked items are submitted to Dynamics with an outbound inventory receipt, and then the pack slip is posted.
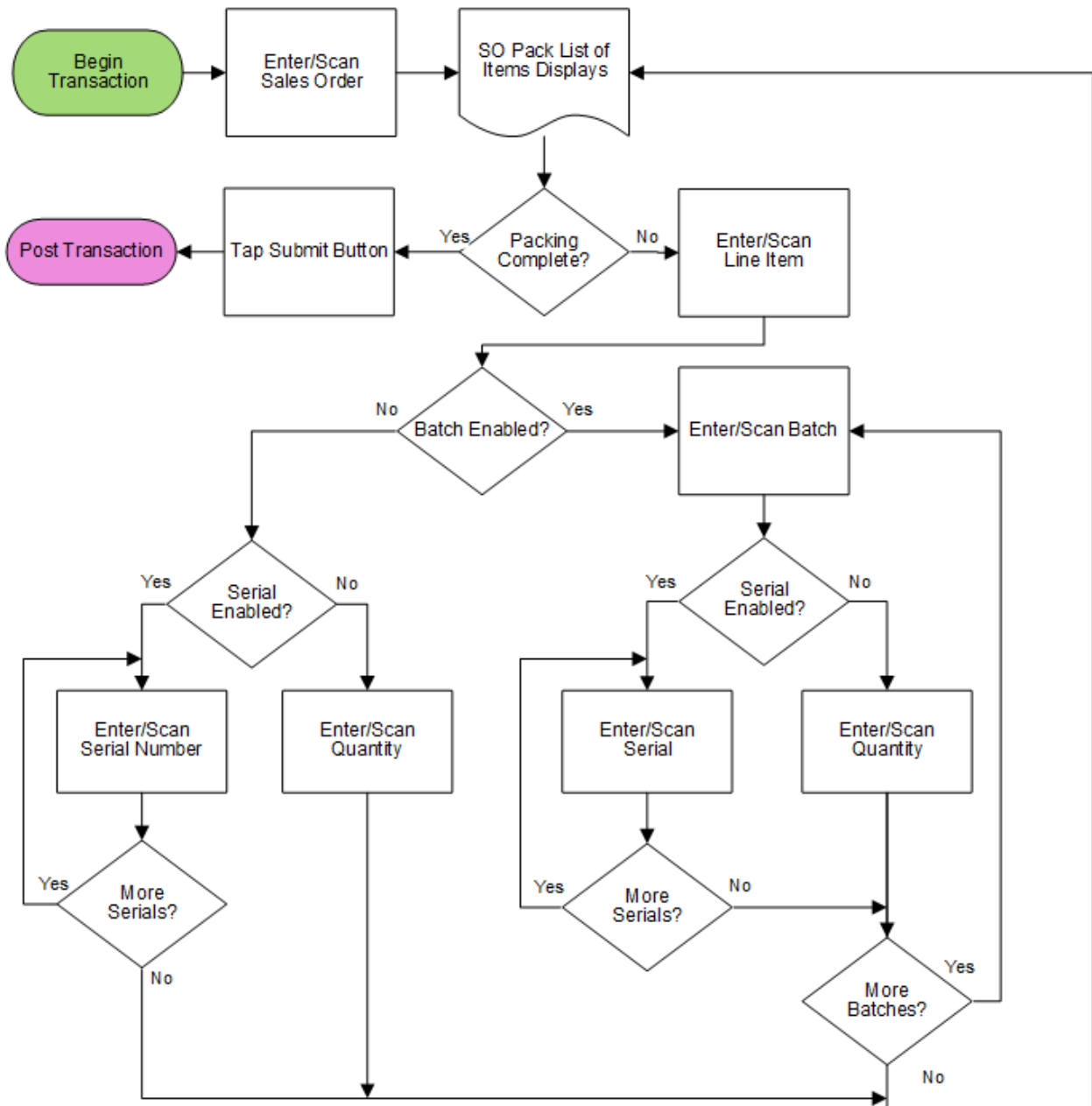
RFgen Functional Documentation

2021

RFgen provides its customers Dynamics-validated, ready-to-use suites of Open Source applications and a development environment that can be used to create new apps or to modify existing apps.

This document describes the business workflow, technical information, and analysis questions for planning customizations to this application.

Microsoft Dynamics: Outbound Orders – Sales Order Pack

FOBSPA400 – Sales Order Pack

This application is developed for the Sales and Marketing module of the Microsoft Dynamics 365 Finance & Operations. It is used to pack items registered in the Sales Order Pick application and ships them from inventory. Items are submitted with an outbound inventory receipt and a pack slip is generated.

Description of Workflow

The user scans, enters, or searches for a sales order identification (SO ID).

A scrollable list of items to be packed displays.

This list comes from the pick list of items that were picked in the Sales Order Pick application.

The user taps or selects a line item to start the packing process.

Fields for entering a batch number or serial number are dependent on the item's Active Tracking Dimensions.

If the batch was enabled, the user scans or enters the batch number to confirm the picked batch, then enters the quantity.

If the serial was enabled, the user scans or enters the serial number to confirm the picked serial. The serial number field tracks multiple entries.

If the serial is not enabled, the user manually enters a packed quantity.

Once the user is done packing item(s) listed in the line item, the line item is removed, and the user selects the next line item to be packed.

If there are no more line items to be packed for a SO, the user taps the **Submit** button.

This completes the ship transaction by posting a packing slip for the sales order.

Navigating the App

At any time, the user can tap the return icon in the upper left corner of the application. Each tap removes the current entry and moves the cursor back to the previous prompt until the user reaches the menu.

The **Change Items** button saves changes, and takes the cursor back to the Items page.

Customization Considerations

If you are planning on creating a new version of this application or modifying it for a customer, consider asking these questions to help prepare your list of customization requirements.

1. Are there serial-controlled items?
2. Are there batch-controlled items?
3. How many steps of validation are required for complete packing?