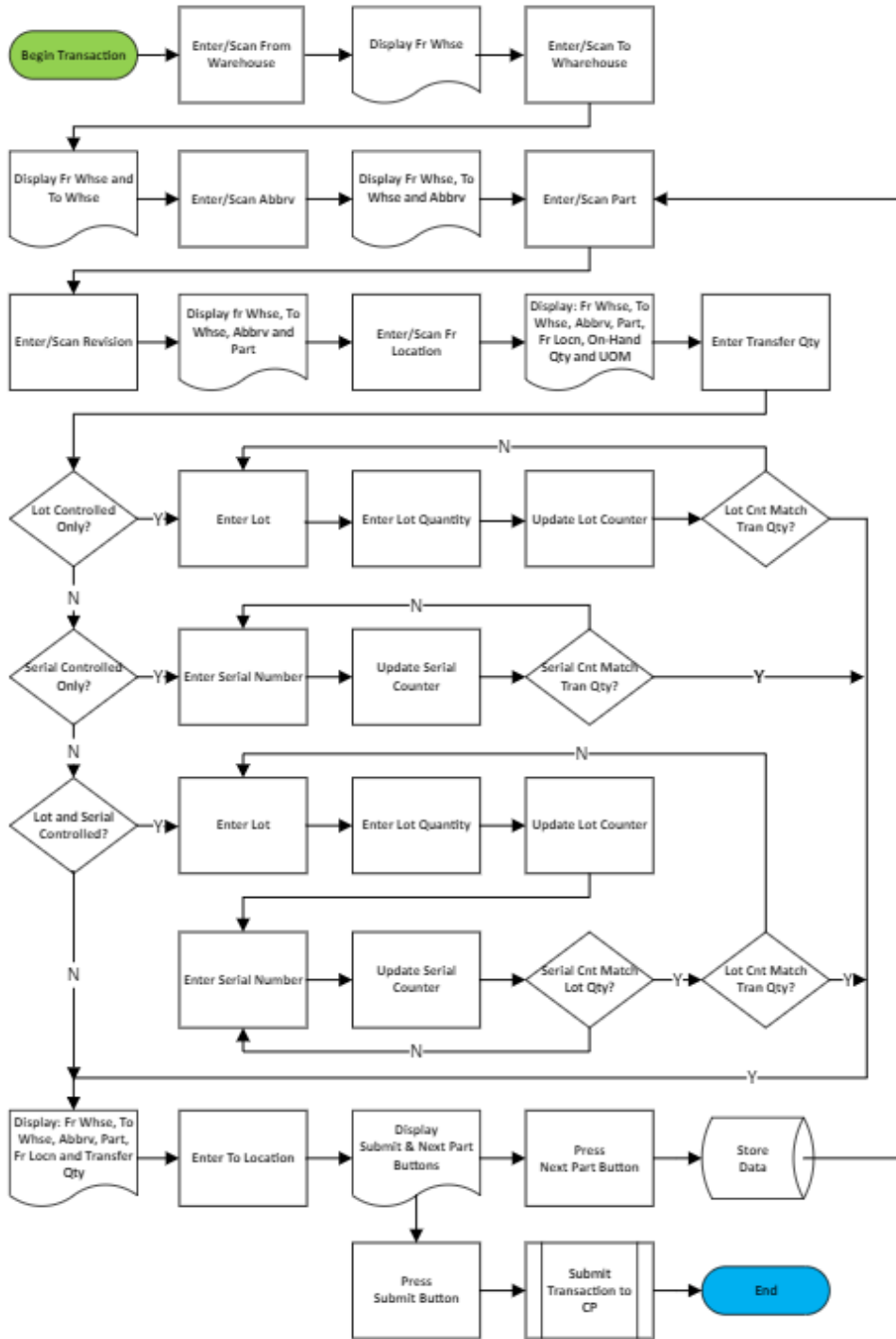# Deltek Costpoint - Location Transfer

This application transfers parts between locations without changing the assigned project.

RFgen Functional Documentation
2022

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

This document describes the business workflow and technical information used in this application.

Deltek. | Marketplace Partner   RFgen

Costpoint: Location Transfer Workflow

```
[Begin Transaction] → [Enter/Scan From Warehouse] → [Display Fr Whse] → [Enter/Scan To Wharehouse]

[Display Fr Whse and To Whse] → [Enter/Scan Abbrv] → [Display Fr Whse, To Whse and Abbrv] → [Enter/Scan Part]

[Enter/Scan Revision] → [Display fr Whse, To Whse, Abbrv and Part] → [Enter/Scan Fr Location] → [Display: Fr Whse, To Whse, Abbrv, Part, Fr Locn, On-Hand Qty and UOM] → [Enter Transfer Qty]

<Lot Controlled Only?> —Y→ [Enter Lot] → [Enter Lot Quantity] → [Update Lot Counter] → <Lot Cnt Match Tran Qty?> —N→
   |N

<Serial Controlled Only?> —Y→ [Enter Serial Number] → [Update Serial Counter] → <Serial Cnt Match Tran Qty?> —N→   —Y→
   |N

<Lot and Serial Controlled?> —Y→ [Enter Lot] → [Enter Lot Quantity] → [Update Lot Counter]
   |N

[Enter Serial Number] → [Update Serial Counter] → <Serial Cnt Match Lot Qty?> —Y→ <Lot Cnt Match Tran Qty?> —Y→
   —N→
   —Y→

[Display: Fr Whse, To Whse, Abbrv, Part, Fr Locn and Transfer Qty] → [Enter To Location] → [Display Submit & Next Part Buttons] → [Press Next Part Button] → (Store Data)

[Press Submit Button] → [Submit Transaction to CP] → (End)
```

FIMLT0300 – Location Transfer

This application transfers parts between locations without changing the assigned project.

Description of Workflow

Navigating the App

If you are on the first field, the **back arrow** button in the upper left corner, returns you to the menu. For all other fields, except the Serials fields, the back arrow button takes you to the previous field/page.

As the user progresses through the application, the values are posted at the top of the page.

Workflow Details

First the From Warehouse field displays the value defaulted from the user profile. The user can tap the **Next** button to accept the defaulted value and advance to the next field, or enter, search or scan a different From Warehouse value.

Then the From Warehouse is listed at the top of the screen, and the To Warehouse field displays. The To Warehouse is defaulted from the From Warehouse, but can be changed by the user by entering, searching or scanning a different To Warehouse.

The To Warehouse is added to the list above, and the inventory From Abbreviation field displays. The user enters, searches or scans the from abbreviation.

The From Abbreviation is added to the list on top of the screen, and the Part Number and Revision fields display. The user enters, searches, or scans the part number. If the part only has one revision it will be defaulted. If the revision has multiple revisions, the user enters, searches, or scans the revision number.

The part is added to the list at the top, and the From Location field displays. The user enters, searches, or scans the location the part will be transferred from.

The From Location is added to the list at the top, and the Total Quantity field displays with the OnHand Quantity and UoM. The user enters the quantity to be transferred.

The cursor advances to the one of the following, depending on how the part is setup.

Lot-Controlled, only Serial-Controlled, Lot and Serial Controlled, or Not Lot or Serial Controlled

- If the part is lot-controlled, the user enters, searches, or scans the lot number, then enters the lot quantity. If the Lot Quantity or accumulation of lot quantities entered equals the Transfer Quantity, the user advances to the To Location field. Otherwise, the user is returned to the Lot field.

- If the part is only serial-controlled, the user enters serials until the serial counter matches the Transfer Quantity and then the user advances to the To Location field.

- If the part is lot and serial-controlled the serial field displays after the lot and lot quantities are entered. The user is prompted to enter the same number of serials as the lot quantity entered. If the accumulated Lot Quantities entered equals the Transfer Quantity, the user advances to the To Location field. Otherwise, the user returns to the Lot field and repeats the process of entering serials for each lot until the Lot Quantity matches the Transfer Quantity.

- If the part is not lot or serial-controlled, then the transfer quantity is added to the top of the list and the To Location field displays. The cursor advances to the To Location field.

- If the user taps the back button in the upper left corner while the cursor on in the lot or serials screen, the application resets the data collected for the current line back to the Transfer Quantity screen.

RFgen

The transfer quantity is added to the top of the screen when the To Location field displays. The **Next** and **Submit** buttons also display.

- If the user taps the **Next Part** button, the collected data is staged on the device, and the user is returned the Abbreviation field.

- If the user taps the **Submit** button, all collected data is sent to Costpoint for transaction, the form is reset, and the user is returned to the From Warehouse field.

- If the user taps the **back arrow** in the upper left corner, the application will reset the data collected for the current line back to the Transfer Quantity screen.

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 lot-controlled items?
3. Are there default sites/warehouses/etc. users are expected to transfer to/from?
4. Should users be allowed transfer to/from serial or lot numbers? For example, should users be allowed to change an item-specific serial or batch allocation?

RFgen