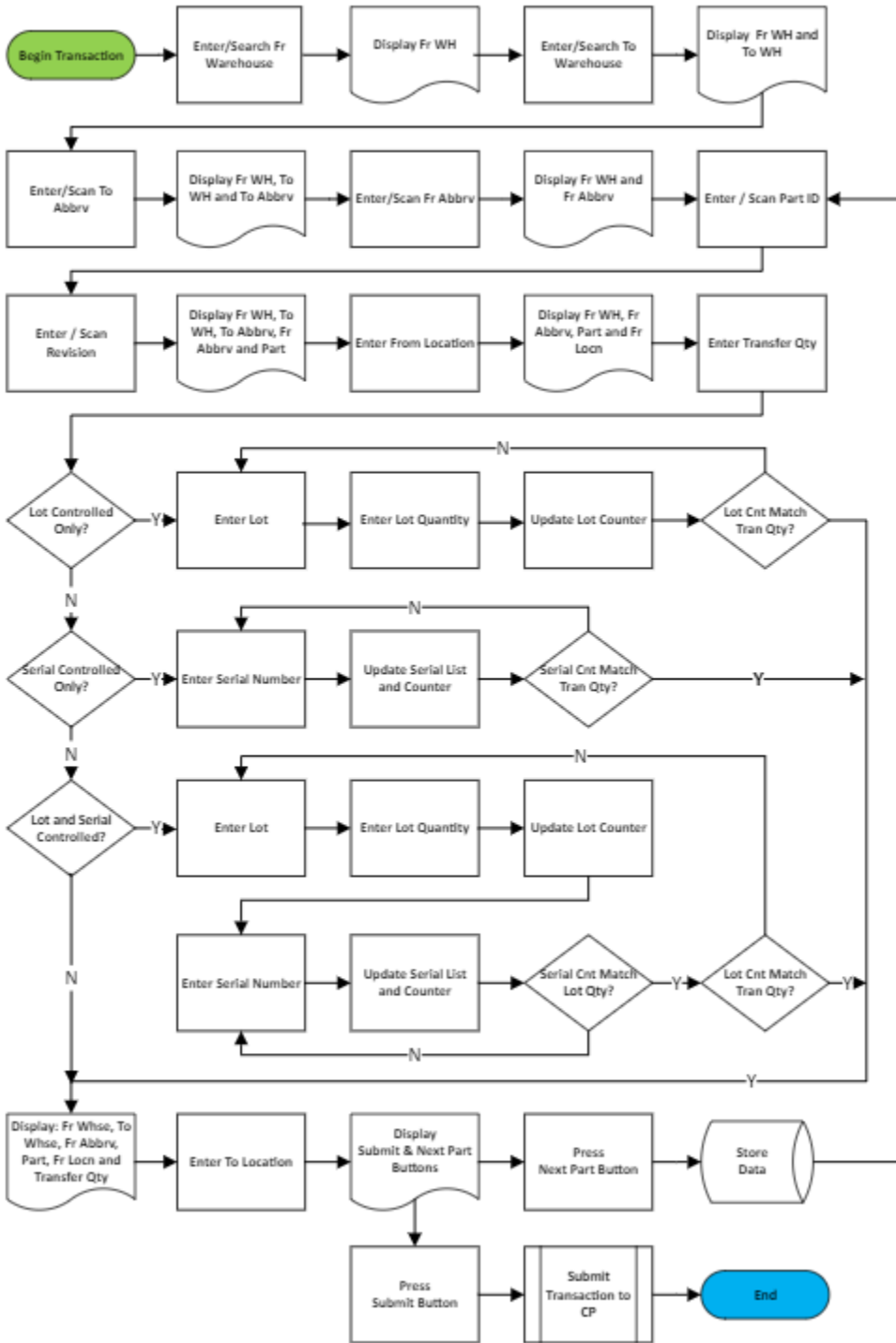# Deltek Costpoint - Inventory Transfer

This application will move parts between warehouses, locations, and abbreviations without a reservation.

RFgen Functional Documentation
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RFgen provides its customers Costpoint-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 and technical information used in this application.

Costpoint: Inventory Transfer Workflow

FIMIT0300 – Inventory Transfer

This application will move parts between warehouses, locations, and abbreviations without a reservation.

Description of Workflow

The From Warehouse field displays the value defaulted from the user's profile. The user can accept it by tapping the **Next** button or change the value by entering, searching or scanning the From Warehouse.

The from warehouse displays at the top of the screen.

The To Warehouse field displays the value defaulted by the From Warehouse. The user can accept it by tapping the **Next** button or change the value by entering, searching or scanning the To Warehouse.

The from and to warehouse display at the top of the screen and the To Abbreviation field displays.

The user enters, searches, or scans the To Abbreviation.

The to abbreviation is added to the list at the top of the screen, and the From Abbreviation field displays.

The user enters, searches, or scans the from abbreviation.

The from abbreviation is added to the list on top, and the Part 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 part has multiple revisions, the user enters, searches, or scans the revision number.

The part number and revision are added to the list on the top, and the Location field displays. The user enters, searches, or scans the from location.

The from location is added to the list on top, and the Total Quantity (the amount to be transferred) field displays.
The Maximum Quantity available and unit of measure (UOM) display under the Total Quantity field. The user enters the total quantity that will be transferred.

The screen that displays next depends on how the part is setup.

- If the part is only lot-controlled, the user enters, searches, or scans the lot number and then enters the lot quantity. If the lot quantity or accumulated lot quantities entered matches the transfer quantity, the cursor advances to the To Location field. The lot number is added to the list at the top of the screen.

- If the part is lot and serial controlled, the Serial field displays after the lot number and lot quantity are entered. The user is required to enter the same number of serials as the lot quantity entered. If the lot quantity or accumulation of lot quantities entered equals the transfer quantity, the cursor advances to the To Location field. Otherwise, the user returns to the Lot field and repeats the Lot number, lot quantity and serials entry process until the lot quantity matches the transfer quantity.

- If the part is only serial-controlled, the Serial field displays, and the user enters the serials until the count of serials entered match the total quantity to be transferred. Then the cursor advances to the To Location field.

The total quantity transferred is added to the list on top of the application when the To Location field displays. The user enters, searches, or scans the To Location.

The **Next Part** and **Submit** buttons display.

If the user taps the **Next Part** button the collected data is staged on the device, and the user is returned to the reservation line screen.

If the user taps the **Submit** button all the collected data is sent to Costpoint for transacting, the form resets, and the From Warehouse field displays.

At any time, the user can tap the back arrow in the upper left corner of the screen and the user is returned to the prior screen/prompt.

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?