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Deltek Costpoint - Inventory Transfer With Reservations

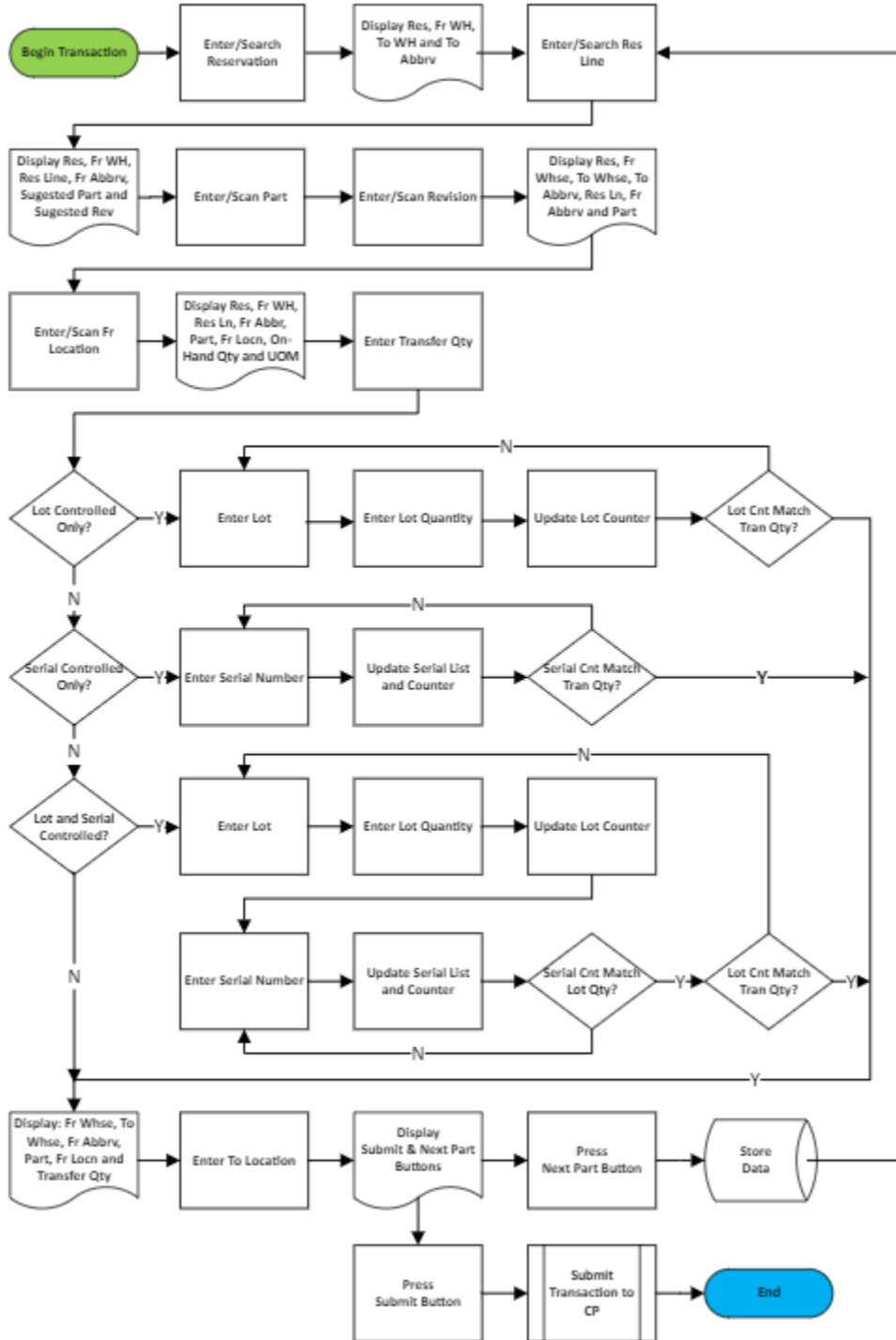
This application will move parts between warehouses, locations, and abbreviations with a reservation.

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.

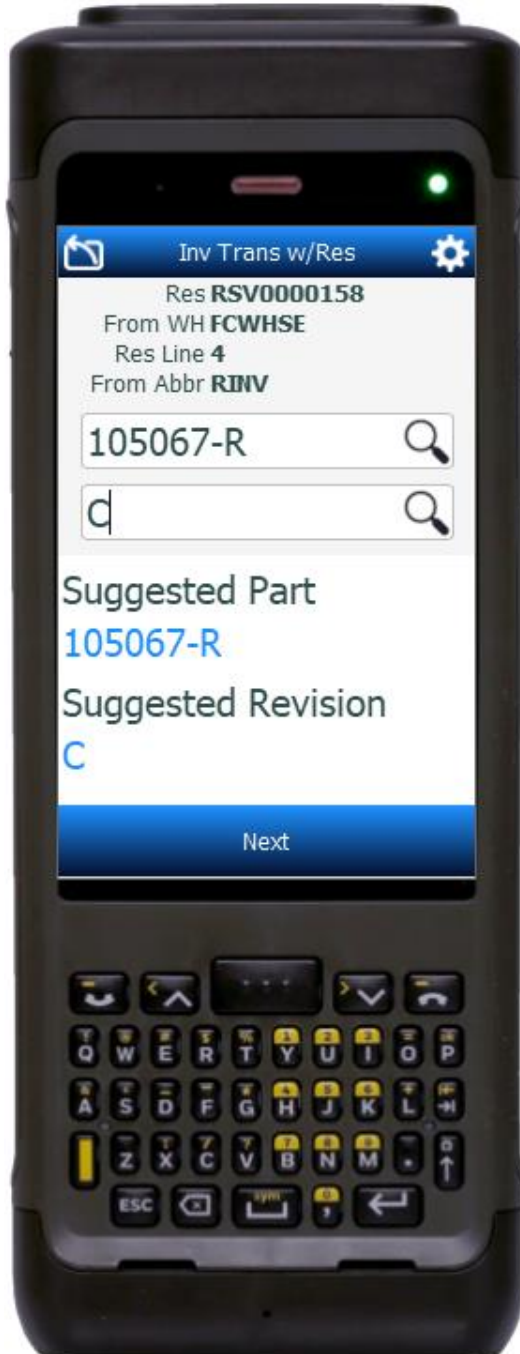
This document describes the business workflow and technical information used in this application.

Costpoint: Inventory Transfer with Reservations Workflow



FIMIT0320 – Inventory Transfer with Reservations

This application will move parts between warehouses, locations, and abbreviations with a reservation.



Description of Workflow

First the user enters, searches, or scans the reservation number.

The system defaults the from warehouse, from abbreviation, to warehouse and to abbreviation values.

The user taps the **Next** button (or the Enter key) to continue to the next prompt.

The reservation number, from warehouse, to warehouse, and to abbreviation display at the top of the screen.

The user enters, searches, or scans the reservation line number.

The reservation line is added to the top of the screen.

The user is prompted to enter, search, or scan the part number and revision. If the part only has one revision it will be defaulted, and the user only enters the part number.

The suggested part and suggested revision values display below the prompts to help the user with the entries.

The part number is added to the list at the top of the screen.



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

The from location is added to the list at the top of the screen (reservation number, from warehouse, reservation line, from abbreviation, part number).

The maximum quantity available on-hand and unit of measure display below the Total Quantity prompt.

The user enters the total quantity that will be transferred.

The display at the top of the screen includes the from abbreviation, part number, from location, and total quantity on-hand availability.

Depending on how the part is setup, the user is prompted to enter lots and/or serials until the transfer quantities required are satisfied.

If the part is only lot-controlled, the user first enters the **lot number** and then the **lot quantity** until the accumulated quantities entered satisfies the transfer quantity. The display at the top of the screen includes the from abbreviation, part number, from location and lot number previously entered.

If the part is also serial-controlled, the user is prompted to enter serials in the same quantity as the lot quantity that was entered. If the lot quantity or accumulation of lot quantities entered equals the transfer quantity, the user moves to the To Location field. Otherwise, the user is returned to the Lot field for entry of the next lot number, lot quantity, and associated serials until the transfer quantity is satisfied.

As each serial number is entered, it is added to the Entered Serials list and the counter is incremented.

When the lot/serial quantities have satisfied the transfer quantity, the from warehouse, to warehouse, from abbreviation, part number, from location, and transfer quantity display.

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 stored (but not submitted to Costpoint), and the user returns to the Reservation Line field.

If the user taps the **Submit** button, all collected data is sent to Costpoint, and the user returns to the Reservation Number field.

At any time, the user can tap the back icon on the upper left corner of the screen and the user is returned to the prior screen/field.

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?

