

Microsoft Dynamics 365 INVENTORY MANAGEMENT – INVENTORY TRANSFER

This application is used to transfer inventory between dimensions such as site, warehouse, and location, batch and/or serial number controls.

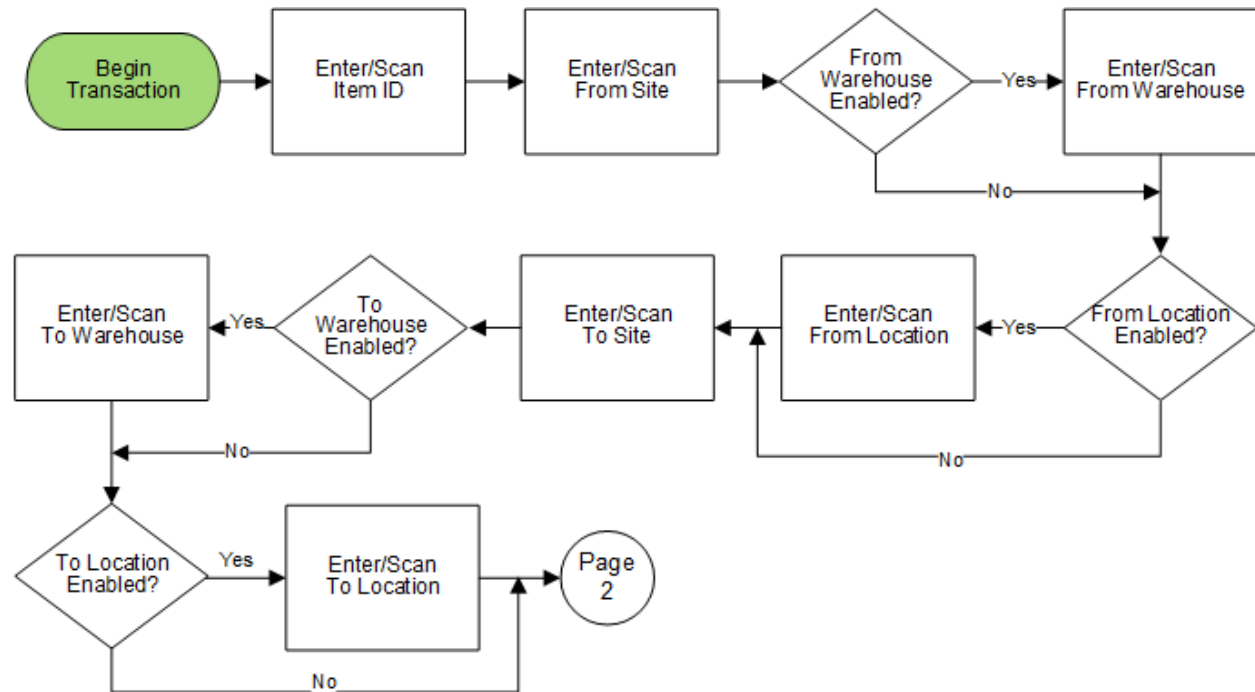
RFgen Functional Documentation
2021

RFgen provides its customers Dynamics-validated Open Source applications that can be used to create new applications or to modify existing ones.

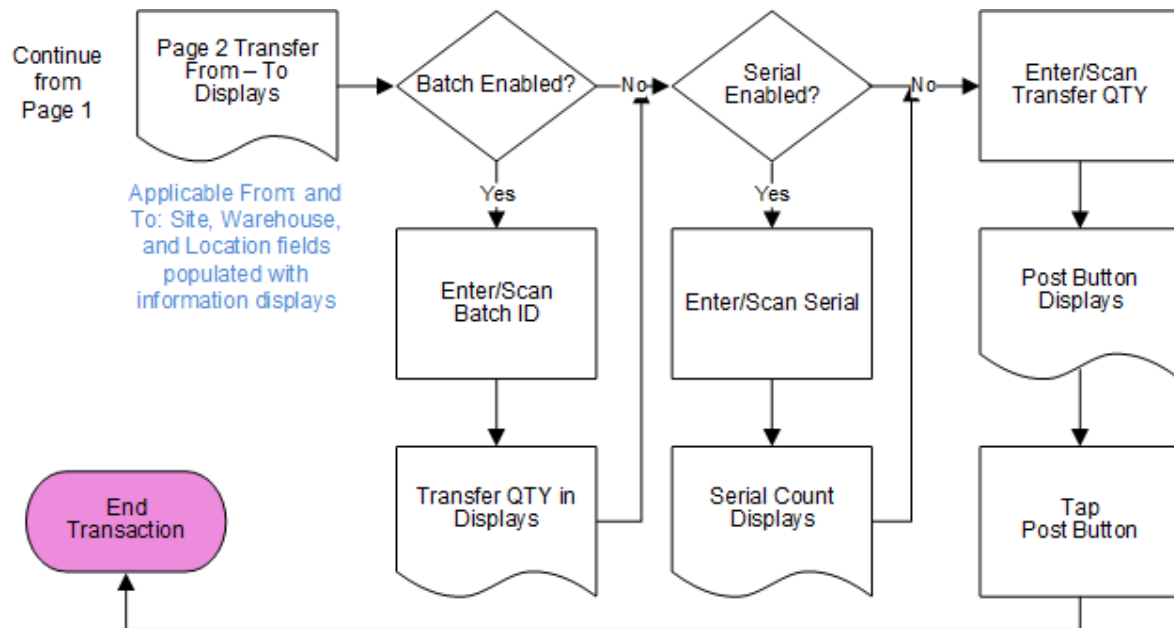
This document describes the business workflow, technical information, and analysis questions for planning customizations to this application.



Microsoft Dynamics: Inventory Transfer Workflow (1 of 2)



Microsoft Dynamics: Inventory Transfer Workflow (2 of 2)



FINITR400 – Inventory Transfer

This application uses the Inventory Management module of the Microsoft Dynamics 365 Finance & Operations to create and post a new Inventory Transfer Journal. Items can be transferred between inventory dimensions such as site, warehouse, and location, batch and/or serial control.



Description of Workflow (Page 1)

First the user scans, enters or searches for the ID of the item to be transferred. The item description displays.

The item's Active Tracking Dimensions determines if the fields for entering a warehouse and location display.

The user scans, enters or searches the transfer from site (Frm Site).

If the warehouse is enabled, the user scans, enters or searches the transfer from warehouse (Frm Whse).

If the location is enabled, the user scans, enters or searches the transfer from location (Frm Locn).

The user scans, enters or searches the transfer to site (To Site).

If the warehouse is enabled, the user scans, enters or searches the transfer to warehouse (To Whse).

If the location is enabled, the user scans, enters or searches the transfer to location (To Locn).

The application takes the user to page 2.



Description of Workflow (Page 2)

On page 2, the item description displays. The display of fields for entering a batch number and serial number are dependent on the item's Active Tracking Dimensions.



If batch is enabled, the Batch field displays, and the user enters a scan or enters a batch number to be registered.

If the serial is enabled, the Serial field displays, and the user scans or enters a serial number.

The serial number tracks multiple entries and displays the total received serial count.

If the serial is not enabled, a quantity (QTY) field displays, and the user scans or enters the amount to be registered.

If the user taps the **Review** button, it takes the user to page 3.

If the user taps the **Post** button, all item entries are posted to a new *Inventory Transfer Journal*.

If the user taps the **Exit** button (any page) the application will exit to the menu without posting.

Left: *Example Inventory Transfer where the item is batch and serial enabled.*

Description of Workflow (Page 2 - Continued)



Left: *Example Inventory Transfer where item is batch but not serial controlled.*

Technical Information

This lists the tables used for validations, searches, and defaults by prompt.

Prompt	Table
Item definitions	ECORESRELEASEDPRODUCTV2ENTITY, ECORESTRACKINGDIMENSIONGROUPEntity, ECORESSTORAGEDIMENSIONGROUPEntity, INVENTTABLE
Site	INVENTSITE
Warehouse	INVENTLOCATION
Location	WMSLOCATION
Item on-hand validation	INVENTSUM

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

