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.
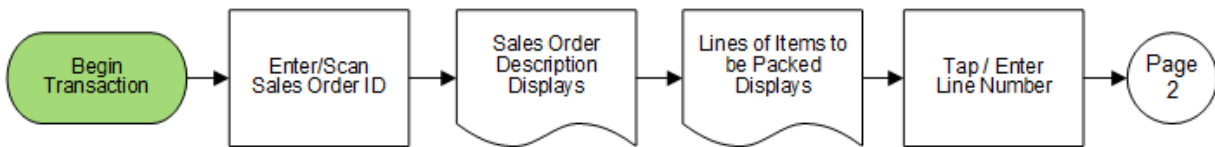
RFgen Functional Documentation

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.
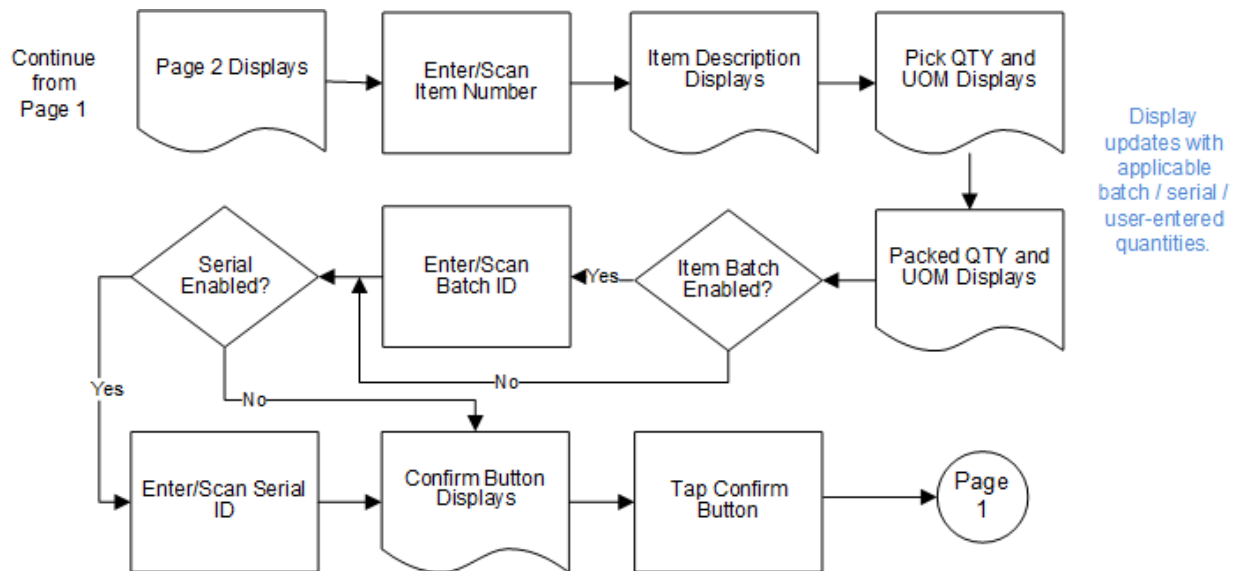
This document describes the business workflow, technical information, and analysis questions for planning customizations to this application.
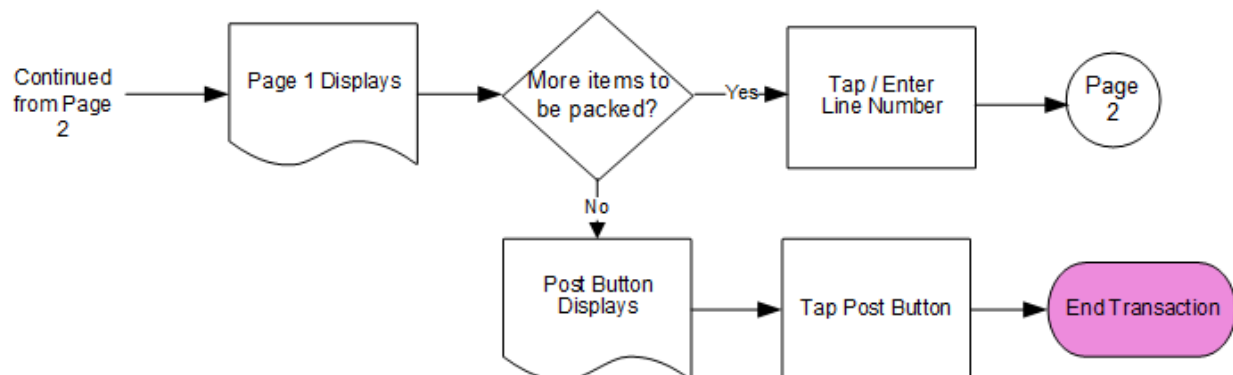
Microsoft Dynamics: Outbound Orders – Sales Order Pack (1 of 3)

```
Begin Transaction → Enter/Scan Sales Order ID → Sales Order Description Displays → Lines of Items to be Packed Displays → Tap/Enter Line Number → Page 2
```

Microsoft Dynamics: Outbound Orders – Sales Order Pack (2 of 3)

```
Continue from Page 1 → Page 2 Displays → Enter/Scan Item Number → Item Description Displays → Pick QTY and UOM Displays

Display updates with applicable batch / serial / user-entered quantities.

Packed QTY and UOM Displays → Item Batch Enabled?
  Yes → Enter/Scan Batch ID → Serial Enabled?
  No → 

Serial Enabled?
  Yes → Enter/Scan Serial ID → Confirm Button Displays → Tap Confirm Button → Page 1
  No →
```

Microsoft Dynamics: Outbound Orders – Sales Order Pack (3 of 3)

```
Continued from Page 2 → Page 1 Displays → More items to be packed?
  Yes → Tap/Enter Line Number → Page 2
  No → Post Button Displays → Tap Post Button → End Transaction
```

RFgen

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 (Page 1)

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 and is taken to Page 2.

The **Exit** button will exit the application and does not post or complete a pack transaction.

Description of Workflow (Page 2)

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

On Page 2 the fields are populated from the Sales Order Pick List registrations completed in the Sales Order Pick application.

The user scans or enters the item number to confirm the selection from the picklist.

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

If 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.

The **Confirm** button displays.

The user taps the **Confirm** button which confirms the items and applicable batch / serials were packed and returns the user to Page 1 to either continue packing, or to ship the package.

If desired, the user can tap the **Cancel** button to cancel the entries (i.e. item and batch/serials) and return to page 1.

On page 1, if the user is done packing the items on the list, the confirmed line item is removed.

If there are no more items to be packed, the **Post** button appears on Page 1.

The user taps the **Post** button to complete the ship transaction by posting a packing slip for the sales order.

The **Exit** button will exit the application and does not post or complete a pack transaction.

Technical Information

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

Prompt	Table
SO ID	SALESTABLE
Customer Name	SALESTABLE
Picked Items List	WMSORDERTRANS
Item definitions	ECORESRELEASEDPRODUCTV2ENTITY, ECORESTRACKINGDIMENSIONGROUPENTITY, ECORESSTORAGEDIMENSIONGROUPENTITY, INVENTTABLE
Picked Item Details	WMSORDERTRANS

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?

RFgen