

Microsoft Dynamics 365 SALES & SHIPPING – SALES ORDER PICK

This application provides a picking route to enable efficient picking of items listed in a Sales Order and register them for the outbound shipment.

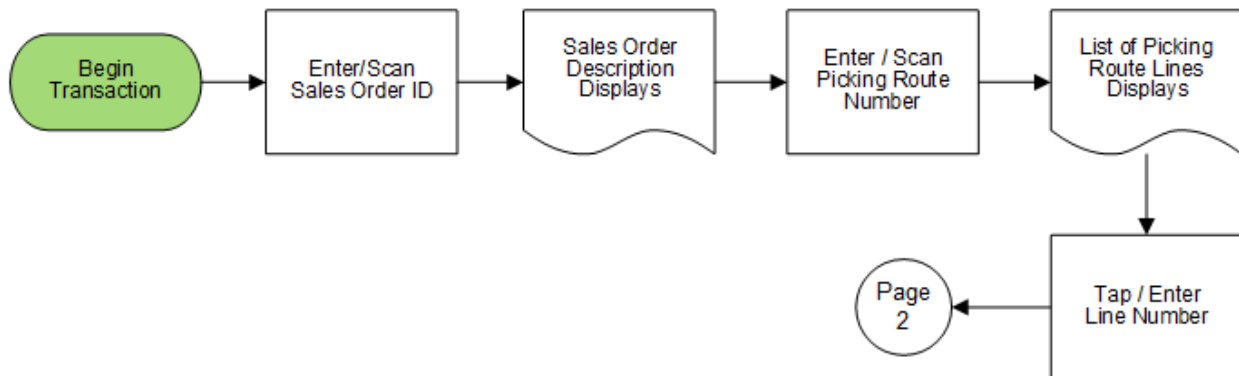
RFgen Functional Documentation
2021

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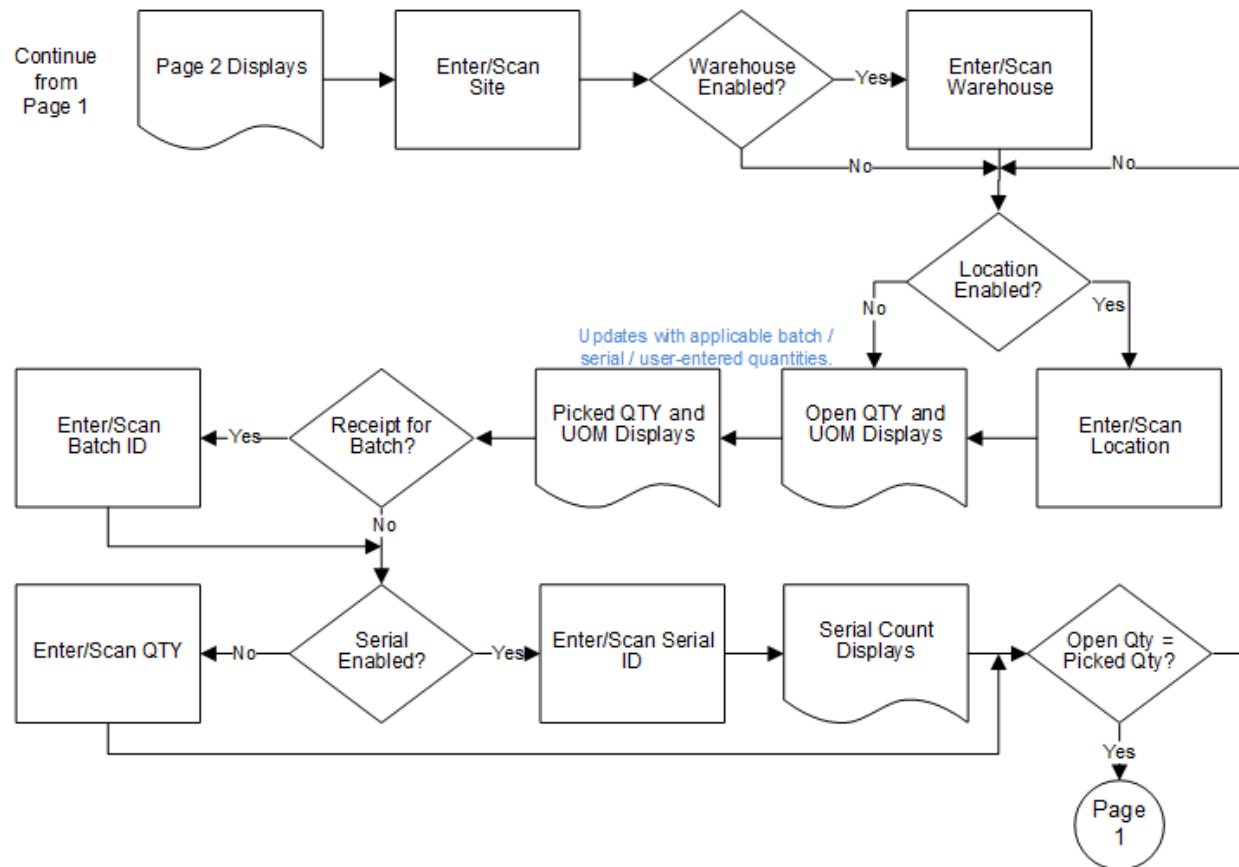
This document describes the business workflow, technical information, and analysis questions for planning customizations to this application.



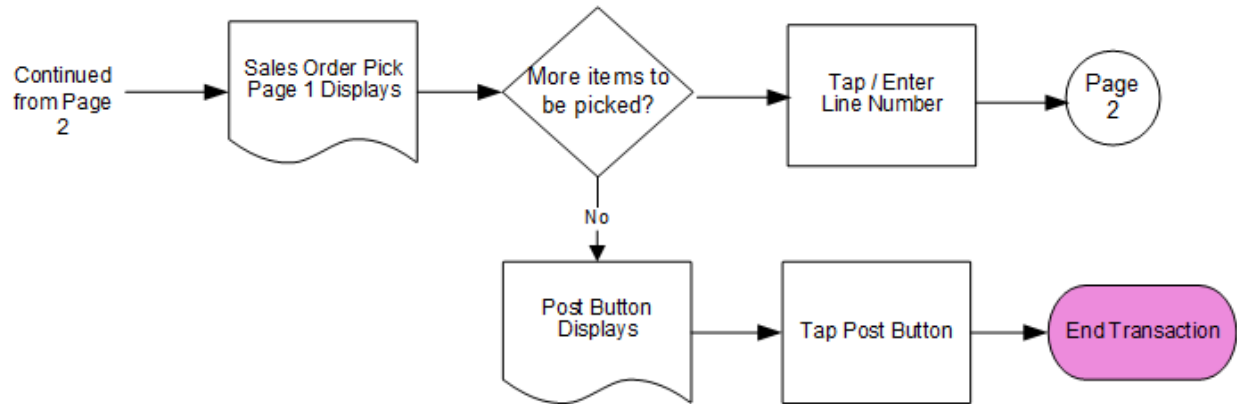
Microsoft Dynamics: OB – Sales Order Pick Workflow (1 of 3)



Microsoft Dynamics: OB – Sales Order Pick Workflow (2 of 3)



Microsoft Dynamics: OB – Sales Order Pick Workflow (3 of 3)



FOBSPI400 – Sales Order Pick

This application is developed for the Sales and Marketing module in Microsoft Dynamics 365 Finance & Operations. It provides a picking route for a specific Sales Order (SO), and the picked items are registered for outbound shipment.



Description of Workflow (Page 1)

First the user scans, enters, or searches for a Sales Order identification (SO ID).

The SO description displays.

The user scans, enters, or searches for a picking route number.

A scrollable list of picking route lines by item display.

The user taps or selects a line item (route) to start picking items.

The user is taken to Page 2.

The **Exit** button is used to exit the application without submitting a transaction.

Description of Workflow (Page 2)

On page 2, the warehouse, location, batch number, and serial number fields display if they are enabled in the item's Active Tracking Dimension. Picking dimensions are defaulted from the pick list if they are defined in the original route.



The user scans, enters, or searches the picking site.

If the warehouse is enabled, then the user scans, enters, or searches the warehouse.

If the location is enabled, then the user scans, enters, or searches the picking location.

If batch is enabled, then the user scans or enters a batch number.

If serial is enabled, then the user scans, enters or searches a serial number. The serial tracks multiple entries and displays the total picked count.

If the serial is not enabled, the quantity (QTY) field displays, and the user manually enters the number of items picked.

As soon as the picked quantity equals the ordered quantity, the user is automatically returned to **page 1** and the route is removed from the pick list on page 1.

The **Review** button takes the user to Page 3 and summarizes the picked batches or serials.

The **Return** button saves semi-completed entries for the route and then returns the user to Page 1.



Description of Workflow (Completed Pick - Page 1)

On page 1, the picked item is removed from the pick list.



If there are no longer any items left, then, the **Post** button displays.

The user taps the **Post** button and items for the route/SO ID are submitted to the ERP.

The **Exit** button exits the application but will not post transactions.

Technical Information

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

Prompt	Table
SO ID	SALESTABLE
Customer Name	SALESTABLE
Picking Route	WMSORDER
Picking Lines	WMSORDERTRANS
Item definitions	ECORESRELEASEDPRODUCTV2ENTITY, ECORESTRACKINGDIMENSIONGROUPENTITY, ECORESSTORAGEDIMENSIONGROUPENTITY, INVENTTABLE
Site	INVENTSITE
Warehouse	INVENTLOCATION
Location	WMSLOCATION
Ordered QTY	WMSORDERTRANS

Note: The Ordered QTY is technically called the “Open QTY” in SQL tables.

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 limited to at picking?
4. Will the picking route number be available before the time of picking?
5. Will pickers know of the Sales Order number sourcing their picking route?

