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Microsoft Dynamics 365 SALES & SHIPPING – TRANSFER ORDER PICK

This application provides a pick route for picking inventory items in a Transfer Order (TO). The picked items are registered for the outbound shipment.

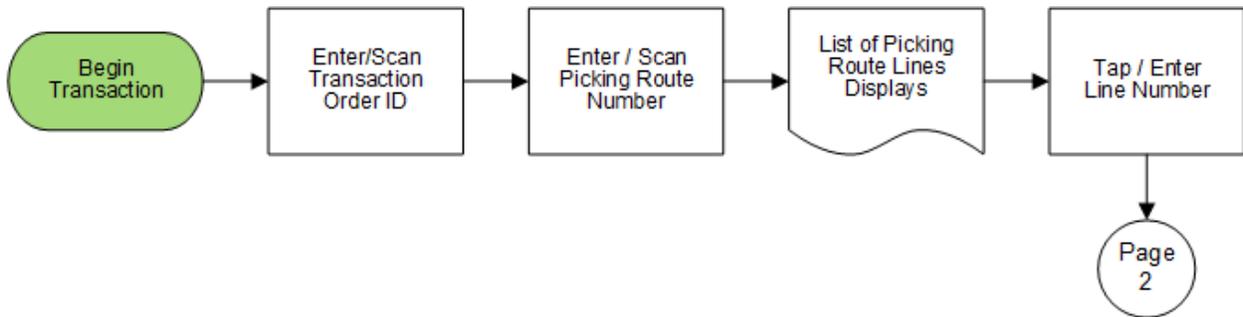
RFgen Functional Documentation
2021

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.

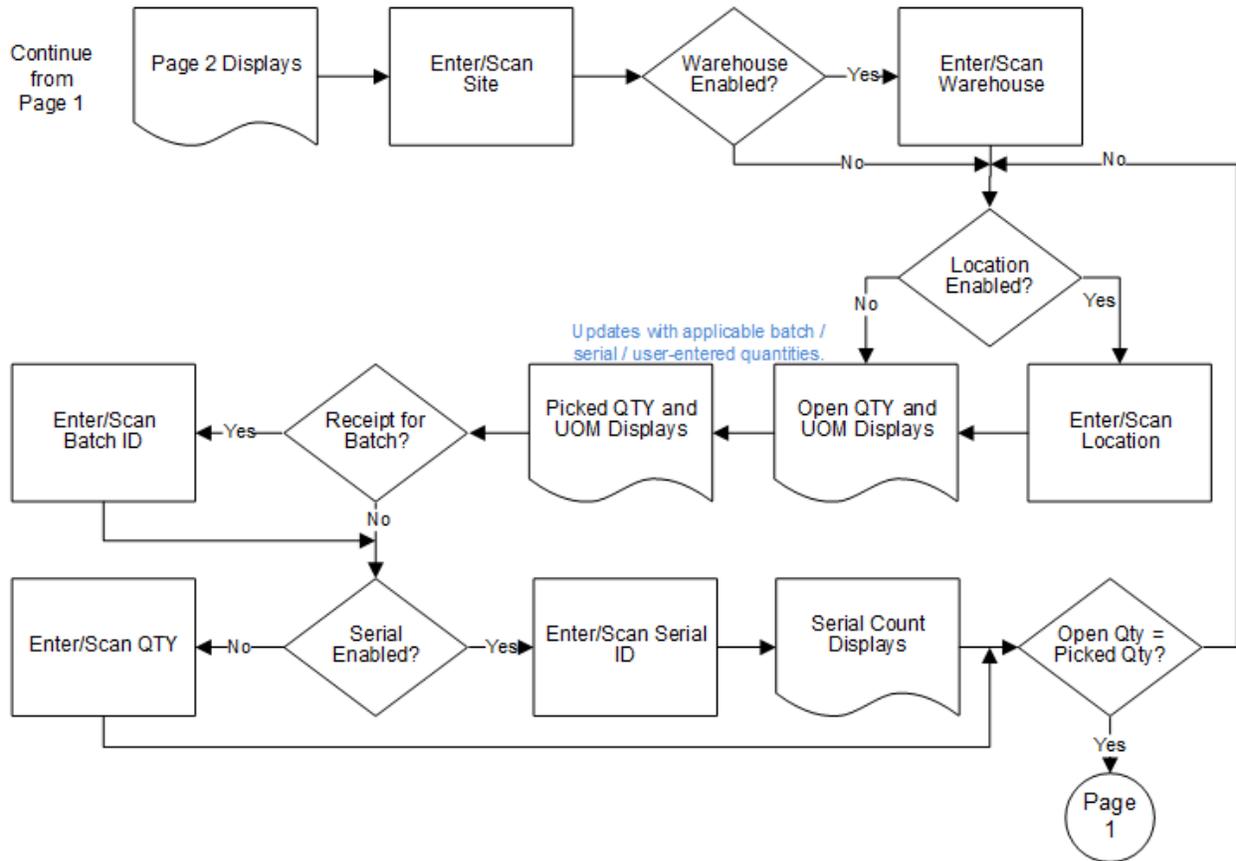
This document describes the business workflow, technical information, and analysis questions for planning customizations to this application.



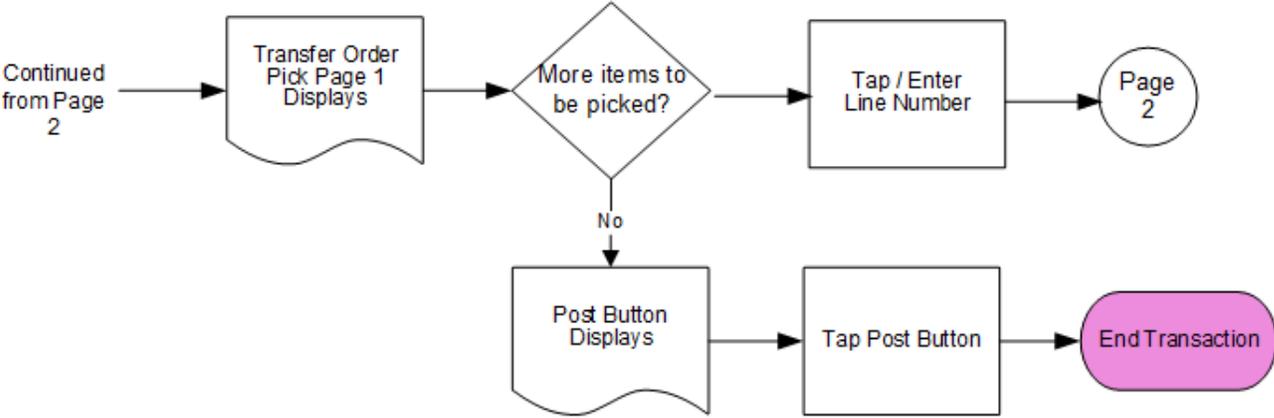
Microsoft Dynamics: OB – Sales Transfer Order (TO) Pick Workflow (1 of 3)



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



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



FOBTPI400 – Sales Transfer Order Pick

This application works with the Inventory Management module of the Microsoft Dynamics 365 Finance & Operations ERP. It provides a picking route for the items listed in a Transfer Order (TO), and then registers the picked items for outbound shipment.



Description of Workflow (Page 1)

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

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 to start picking that item.

The user is taken to Page 2.

At any time, the user can tap the **Exit** button to return to the menu 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.



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

If the warehouse is enabled, then the user scans, enters, or searches for a 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 quantity picked.

As soon as the quantity picked equals the ordered quantity, the application automatically registers the entries, removes the picking route line from the Transfer Order, and takes the user back to **page 1**.

If the user has not yet completed all picks, the user can tap the **Return** button which will save picked quantities and take the user to page 1.



Description of Workflow (Completed Pick - Page 1)

On page 1, the picked items are removed from the pick list when the quantity of picked items equaled the quantity of ordered items from page 2.



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

The user taps the **Post** button and items for the route/transfer order (TO ID) are submitted to the ERP.

The **Exit** button returns the user to the menu but does not post or submit entries to Dynamics.

Technical Information

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

Prompt	Table
TO ID	INVENTTRANSFERTABLE
Picking Route	WMSORDER
Picking Lines	WMSORDERTRANS
Item definitions	ECORESRELEASEDPRODUCTV2ENTITY, ECORESTRACKINGDIMENSIONGROUPENTITY, ECORESSTORAGEDIMENSIONGROUPENTITY, INVENTTABLE
Site	INVENTSITE
Warehouse	INVENTLOCATION
Location	WMSLOCATION
Ordered QTY	WMSORDERTRANS

Note: The Ordered Quantity is typically called the Open Quantity table in SQL.

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 Transfer Order number sourcing their picking route?

