

Microsoft Dynamics 365 PURCHASING & RECEIVING – TRANSFER ORDER RECEIVING

This application receives inbound Transfer Order items to an inventory receipt including warehouse location, batch number, and other inventory tracking dimensions.

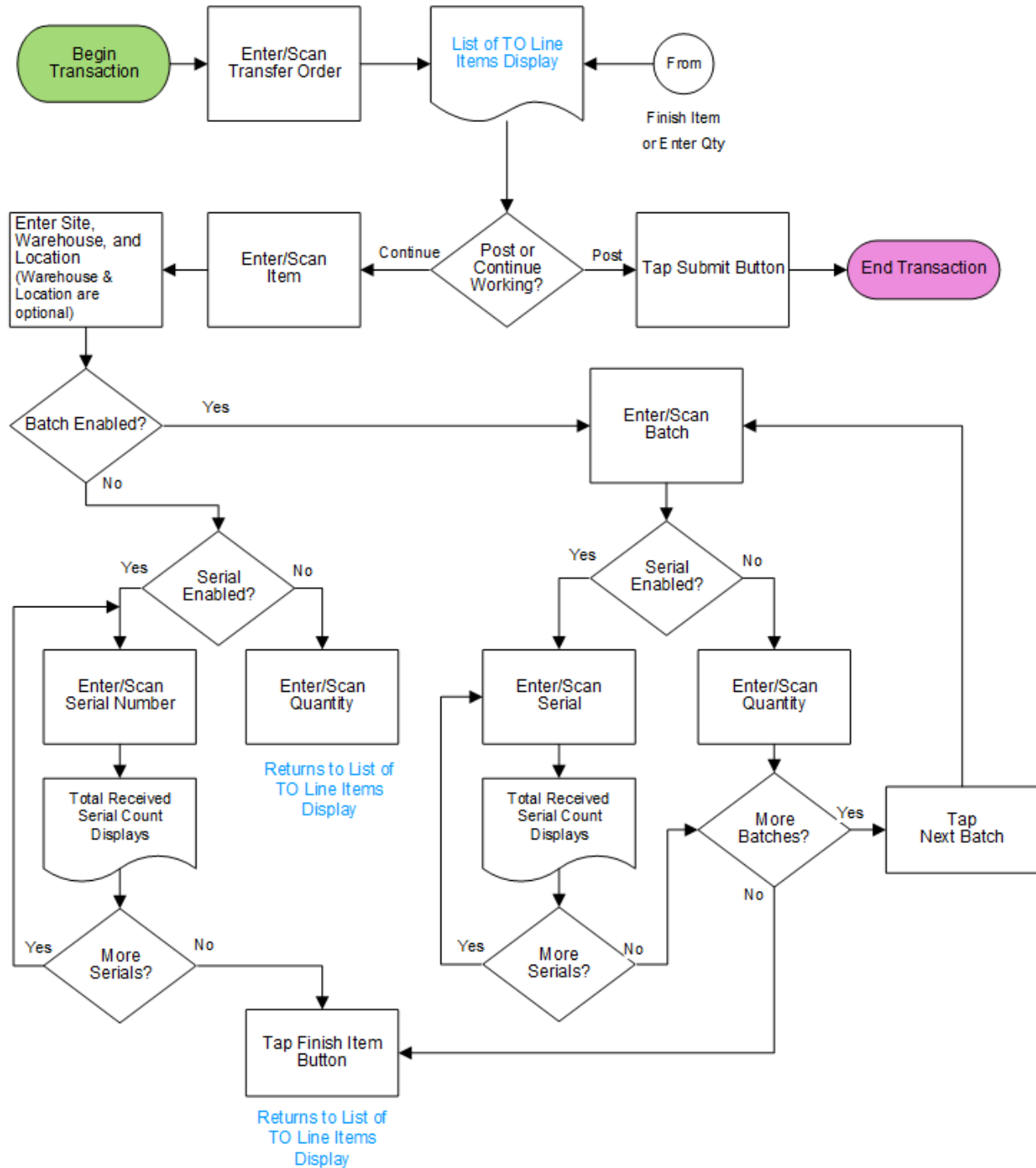
RFgen Functional Documentation
2021

RFgen provides its customers Microsoft 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.

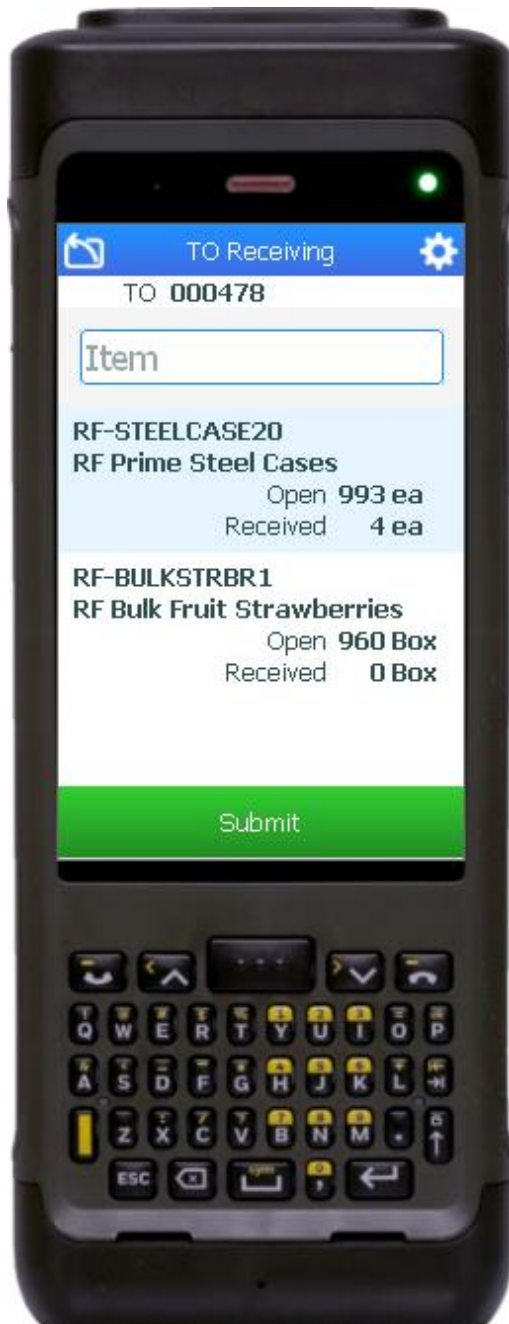


Microsoft Dynamics: Transfer Order Receiving



FIBTOR400 –Transfer Order Receiving

This application is for the Inventory Management module of Dynamics 365 Finance & Operations. It receives inbound Transfer Order (TO) items to an inventory receipt including warehouse location, batch number, and other inventory tracking dimensions.



Description of Workflow

First the user scans, enters or searches for a transfer order.

The list of transfer order lines by item display.

If an item has a receive quantity greater than zero, the Submit button displays and if tapped, all items with receive quantities greater than zero are posted. If there are no items with a receive quantity greater than zero, the Submit button will be hidden.

The user enters, scans, or selects a line item from the PO to continue receiving items.

The user enters the Site. Depending on the customer's setup (Asset Tracking Dimensions), the user may or may not be prompted to select the warehouse and/or location.

Note that items can be received by batch, batch then serial, serial only (no batch), or neither batch or serial.

If the received item is neither batch nor serial, the user will be prompted to enter the quantity and tap the **Submit** button (to post the transaction), or the user will be prompted to select another item in the TO list and continue working.

If the item is only batch-enabled, the user is prompted to enter a batch (a number or any text) and then enter the quantity. Once the quantity is added the user can then repeat this process by tapping the **Next Batch** button or be returned to the Item selection field by tapping the **Finish Item** button.

If the item is batch-enabled and serial-enabled, after the batch is entered, 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. After the serial is entered, the user can enter more serials, or process another batch by tapping the **Next Batch** button. If there are no more batches, then the user can returned to the Item selection field by tapping the **Finish Item** button.

If the item is only serial-enabled, then the serial field displays and the user is prompted to enter the serial and a serial count will display the updates. Once the user is done, a **Finish Item** button displays. This returns the user to the Item selection field where the user can decide to submit and post changes or continue working with new items.

At any time, the user can tap the return icon in the upper left corner of the application. Each tap removes the current entry and moves the cursor back to the previous prompt until the user reaches the menu.

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 receiving?
4. Are receivers allowed to register partial receipt?