

Microsoft Dynamics 365 OUTBOUND – TRANSFER ORDER PICKING

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

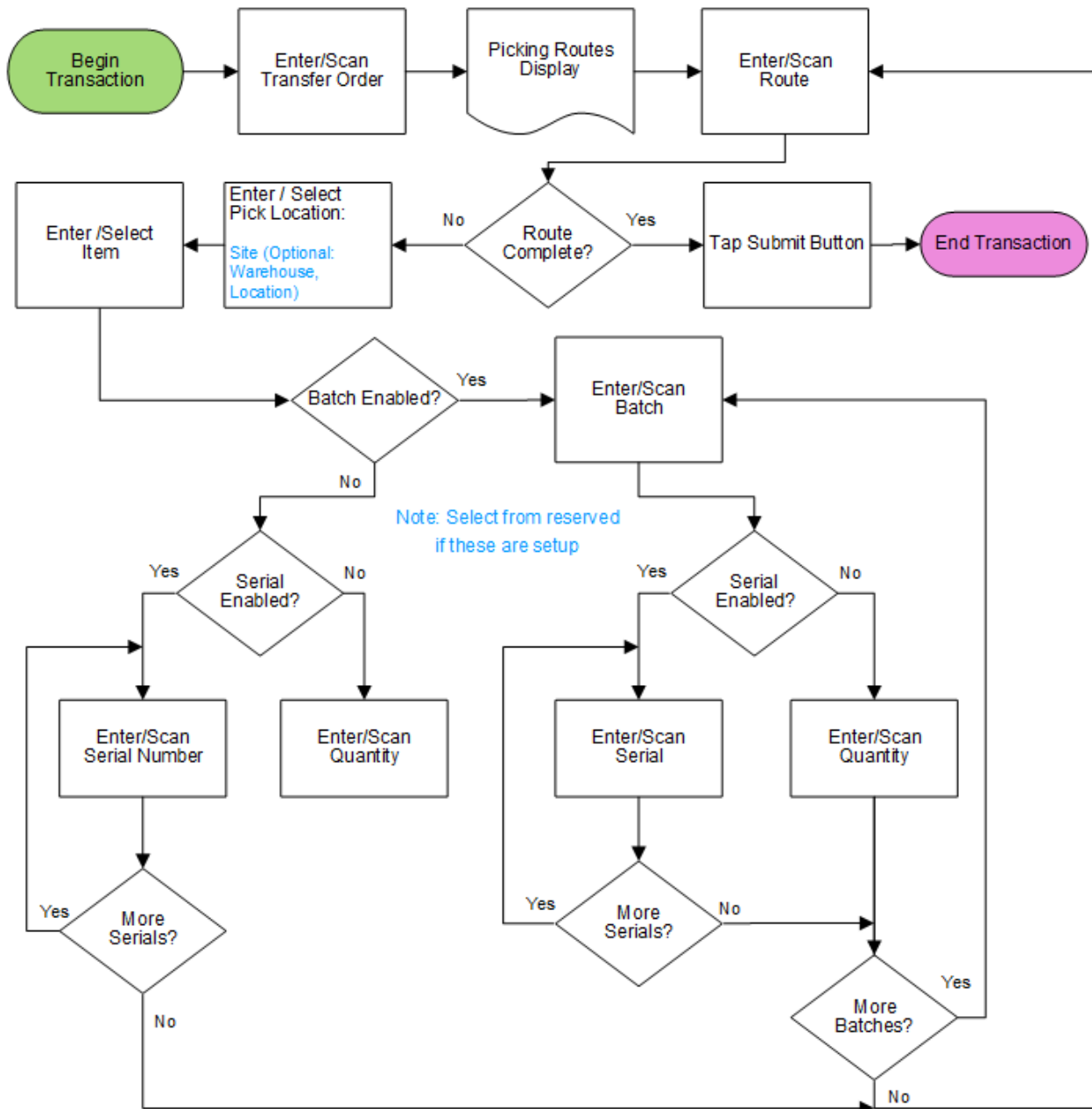
RFgen Functional Documentation
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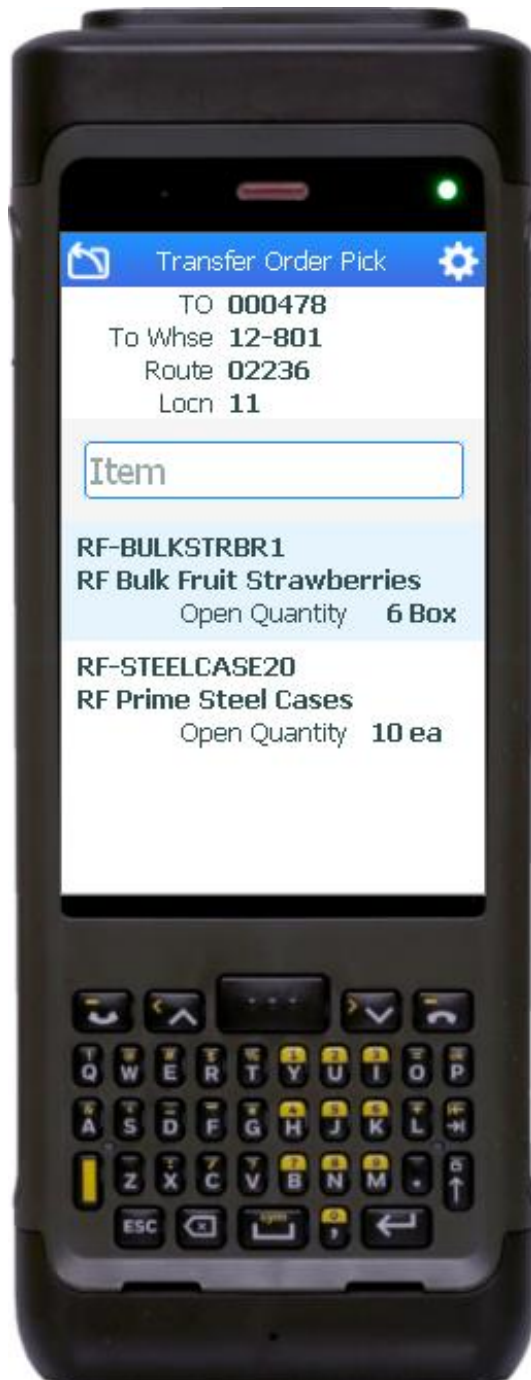
This document describes the business workflow, technical information, and analysis questions for planning customizations to this application.



Microsoft Dynamics: Outbound - Transfer Order Picking Workflow



FOBTPI400 – Outbound: Transfer Order Picking



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, and then registers the picked items for outbound shipment.

Description of Workflow

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

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

A consolidated list of picking locations is displayed. Route items without a location or warehouse are consolidated to the next highest dimension. The user selects the next dimension (ie. Location) until the list of items displays.

A consolidated list of items reserved at the selected location is displayed.

If an item does not have all of its dimensions defined yet (i.e. a Location controlled item only has its Warehouse reservation defined), the user will be asked to enter the remaining dimensions after selecting the item.

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



If the item is neither batch nor serial, the user will be prompted to enter the quantity. If there are no other pick items left to transfer the user can tap the **Submit** button to post the transaction.

If the item is only batch-enabled, the user is prompted to enter or scan a batch (a number or any text) and then enter the quantity.

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.

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.

If the item is a reserved batch or reserved serial, the user is prompted to manually enter or scan a quantity. If the reserve quantity is met, the transaction is posted to the ERP.

Navigating the App

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.

The **Change Item** button saves changes made in the application (it does not save changes to the ERP), and takes the user to the page listing line items.

The **Change Location** button saves changes made in the application (it does not save changes to the ERP), and takes the user to the page listing pick locations.

The **Submit** button posts the changes to the ERP when a pick is complete. Partial picks are not supported by the application unless it was customized to submit partial picks.



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?

