Deltek Costpoint - Issue to Sales Order

This application issues inventory parts to a sales order.
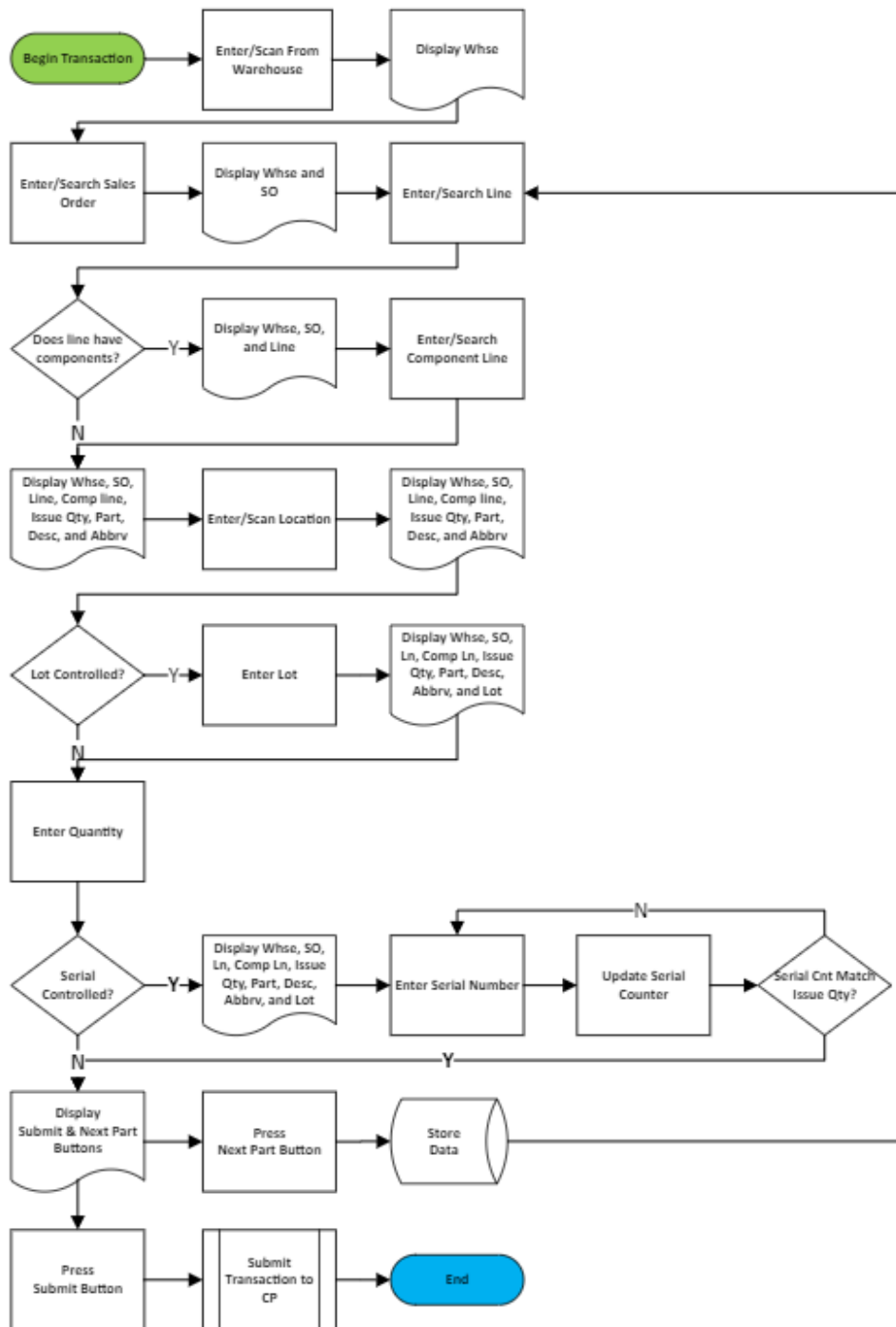
RFgen Functional Documentation
2021

RFgen provides its customers Costpoint-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 and technical information used in this application.

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Costpoint: Issue to Sales Order Workflow

Begin Transaction → Enter/Scan From Warehouse → Display Whse

Enter/Search Sales Order → Display Whse and SO → Enter/Search Line

Does line have components? —Y→ Display Whse, SO, and Line → Enter/Search Component Line

N

Display Whse, SO, Line, Comp line, Issue Qty, Part, Desc, and Abbrv → Enter/Scan Location → Display Whse, SO, Line, Comp line, Issue Qty, Part, Desc, and Abbrv

Lot Controlled? —Y→ Enter Lot → Display Whse, SO, Ln, Comp Ln, Issue Qty, Part, Desc, Abbrv, and Lot

N

Enter Quantity

Serial Controlled? —Y→ Display Whse, SO, Ln, Comp Ln, Issue Qty, Part, Desc, Abbrv, and Lot → Enter Serial Number → Update Serial Counter → Serial Cnt Match Issue Qty?

N / Y

N

Display Submit & Next Part Buttons → Press Next Part Button → Store Data

Press Submit Button → Submit Transaction to CP → End

FIMLT0300 – Issue to Sales Order

This application issues inventory parts to a sales order.

Description of Workflow

First the Warehouse is defaulted from the user profile. The user can accept the value and tap the **Next** button (or Enter key) to continue, or the user can change the warehouse value by entering, scanning, or searching the warehouse.

The warehouse displays at the top of the screen.

The user enters, searches, or scans the sales order identification (ID). The sales order ID display is added to the top of the screen.

The user enters, searches, or scans the line number. If the part number associated to the line is a kit with multiple parts, the user is prompted to select a component line number.

The line number, open issue quantity, part, description, and abbreviation are added to the top of the screen.

The user enters, searches, or scans the location the part(s) is being issued from. Then the user enters, searches, or scans the lot number.

The on-hand location quantity and unit of measure (UOM) are added to the display at the top of the screen.

The user enters the quantity being issued to the sales order.

If the part is lot-controlled, the lot number is added to the display at the top of the screen.

The user enters, searches, or scans the serial numbers for the part being issued. As each serial number is selected, it is added to Entered Serials list, and the serial counter is incremented.

If the user taps the **Next Line** button, the collected data is stored on the device, the application is partially reset, and the user is taken to the Line field.

If the user taps the **Submit** button, all the collected data is submitted to Costpoint for transaction, the app resets the form, and the user is taken to the warehouse field on the first screen.

At any time, the user can tap the back arrow in the upper left corner at any time, and it will take the user back to the prior screen/prompt.

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 lot-controlled items?
3. Are there default sites/warehouses/etc. users are expected to transfer to/from?
4. Should users be allowed transfer to/from serial or lot numbers? For example, should users be allowed to change an item-specific serial or batch allocation?

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