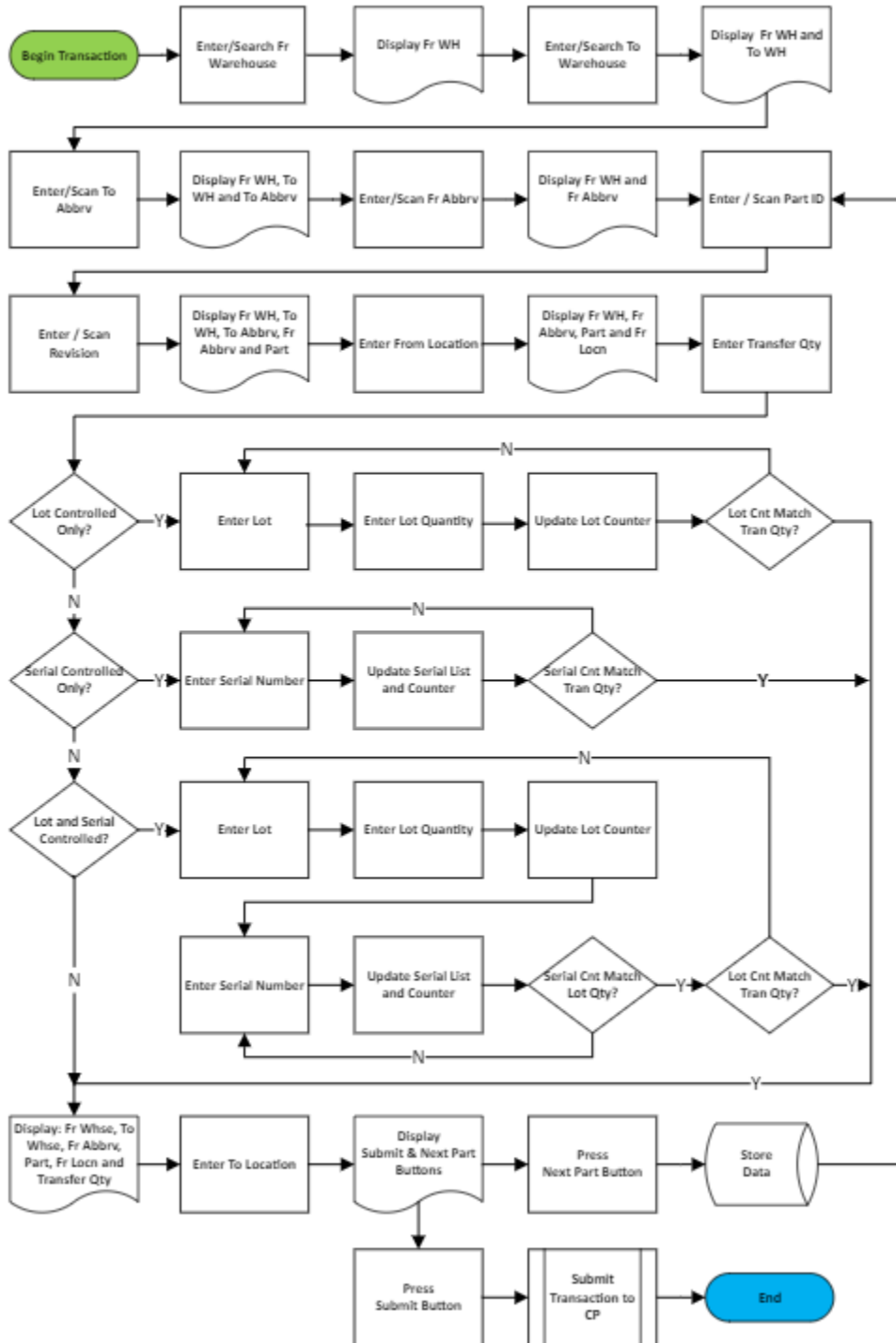# Deltek Costpoint - Location Transfer

This application will move parts between warehouses, locations, and abbreviations without a reservation.

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.

Deltek. | Marketplace Partner   **RFgen**

Costpoint: Inventory Transfer with Reservations Workflow

FIMIT0300 – Inventory Transfer with Reservations

This application will move parts between warehouses, locations, and abbreviations without a reservation.

Description of Workflow

The From Warehouse field displays the value defaulted from the user's profile. The user can accept it by tapping the **Next** button or change the value by entering, searching or scanning the From Warehouse.

The from warehouse displays at the top of the screen.

The To Warehouse field displays the value defaulted by the From Warehouse. The user can accept it by tapping the **Next** button or change the value by entering, searching or scanning the To Warehouse.

The from and to warehouse display at the top of the screen.

The user enters, searches, or scans the to abbreviation.

The to abbreviation displays with the from and to warehouse at the top of the screen.

The user enters, searches, or scans the from abbreviation.

The user enters, searches, or scans the part number. If the part only has one revision it will be defaulted. If the part has multiple revisions, the user enters, searches, or scans the revision number.

The part number display with the from warehouse, to warehouse, to abbreviation, and from abbreviation at the top of the screen.

The user enters, searches, or scans the from location.

The from location displays with the from warehouse, from abbreviation, and part number at the top of the screen.

The maximum quantity available and unit of measure display under the Total Quantity field. The user enters the total quantity that will be transferred

The on-hand available displays with the from abbreviation, part number, and from location at the top of the screen.

If the part is lot-controlled, the user enters, searches, or scans the lot number and then enters the lot quantity. If the lot quantity or accumulated lot quantities entered satisfies the transfer quantity, the user moves to the To Location field.

The lot number displays with the from abbreviation, part number, and from location at the top of the screen.

If the part is also serialized, the serial field displays, and the user enters the same number of serials as the lot quantity entered. If the lot quantity or accumulation of lot quantities entered equals the transfer quantity, the user moves to the To Location field. Otherwise, the user returns to the Lot field and enters the next lot number, lot quantity and serials until the transfer quantity is satisfied.

As the user enters, searches, or scans each serial number, the serial number is added to the Entered Serials list and the counter is incremented.

The total quantity transferred displays with the from warehouse, to warehouse, from abbreviation, part number, and from location at the top of the screen.

The user enters, searches, or scans the To Location.

The **Next Part** and **Submit** buttons display.

If the user taps the **Next Part** button the collected data is staged on the device, and the user is returned to the reservation line screen.

If the user taps the **Submit** button all the collected data is sent to Costpoint for transacting, the form resets, and the From Warehouse field displays.

At any time, the user can tap the back arrow in the upper left corner of the screen and the user is returned 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?