

# Deltek Costpoint - Location Transfer

This application transfers parts between locations without changing the assigned project.

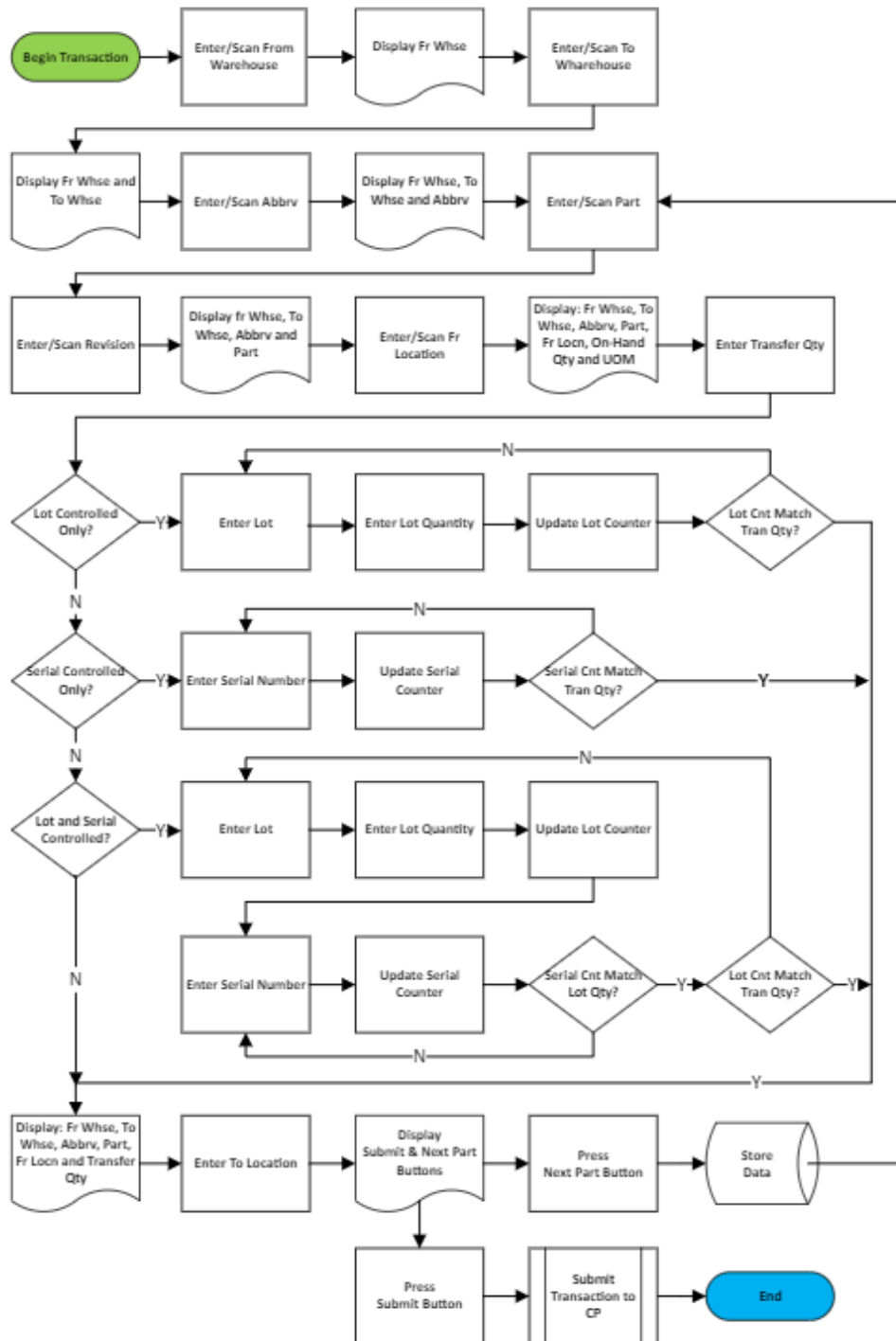
---

## 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.

## Costpoint: Location Transfer Workflow



## FIMLT0300 – Location Transfer



This application transfers parts between locations without changing the assigned project.

### Description of Workflow

The From Warehouse field displays the value defaulted from the user profile. The user can tap the **Next** button to accept this value or change it 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 from the from warehouse previously entered. The user can tap the **Next** button to accept this value or change it by entering, scanning, or searching the to warehouse.

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

The user enters, searches or scans the from abbreviation for the parts being transferred.

The from abbreviation displays with the from warehouse, to warehouse, and from abbreviation.

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

If the revision has multiple revisions, the user enters, searches, or scans the revision number.

The part number displays with the from warehouse, to warehouse, and from abbreviation.

The user enters, searches, or scans the location the part will be transferred from.

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

The maximum on-hand available displays below the Transfer Quantity field so the user knows how much is available for transfer. The user enters the quantity that will be transferred.

The transfer quantity displays with the from warehouse, to warehouse, from abbreviation, part number, and from location.

If the part is lot-controlled, the user enters, searches, or scans the lot number, then enters the lot quantity. If the lot quantity or accumulation of lot quantities entered equals the transfer quantity, the user advances to the To Location field. Otherwise, the user is returned to the Lot field. Once the transfer quantity is satisfied, the transfer quantity displays with the from warehouse, to warehouse, 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 is prompted to enter 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 advances to the To Location field. Otherwise, the user returns to the Lot field and enters the next lot number, lot quantity and serial numbers (if its lot-serialized) until the transfer quantity is satisfied.

As each serial number is entered, it is added to the Entered Serials list, and the counter is incremented.

When the transfer quantity is satisfied, To Location field displays, and the transfer quantity 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 and the **Next Part** button and **Submit** buttons display.

If the user taps the **Next Part** button, the collected data is staged on the device, the form is partially reset, and the user is returned the Abbreviation field.

If the user taps the **Submit** button, all collected data is sent to Costpoint for transaction, the form is reset, and the user is returned to the From Warehouse field.

At any time, the user can tap the back arrow in the upper left corner and be returned to the previous 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?