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# Deltek Costpoint - Positive Quantity Adjustment

This application will do a positive quantity adjustment.

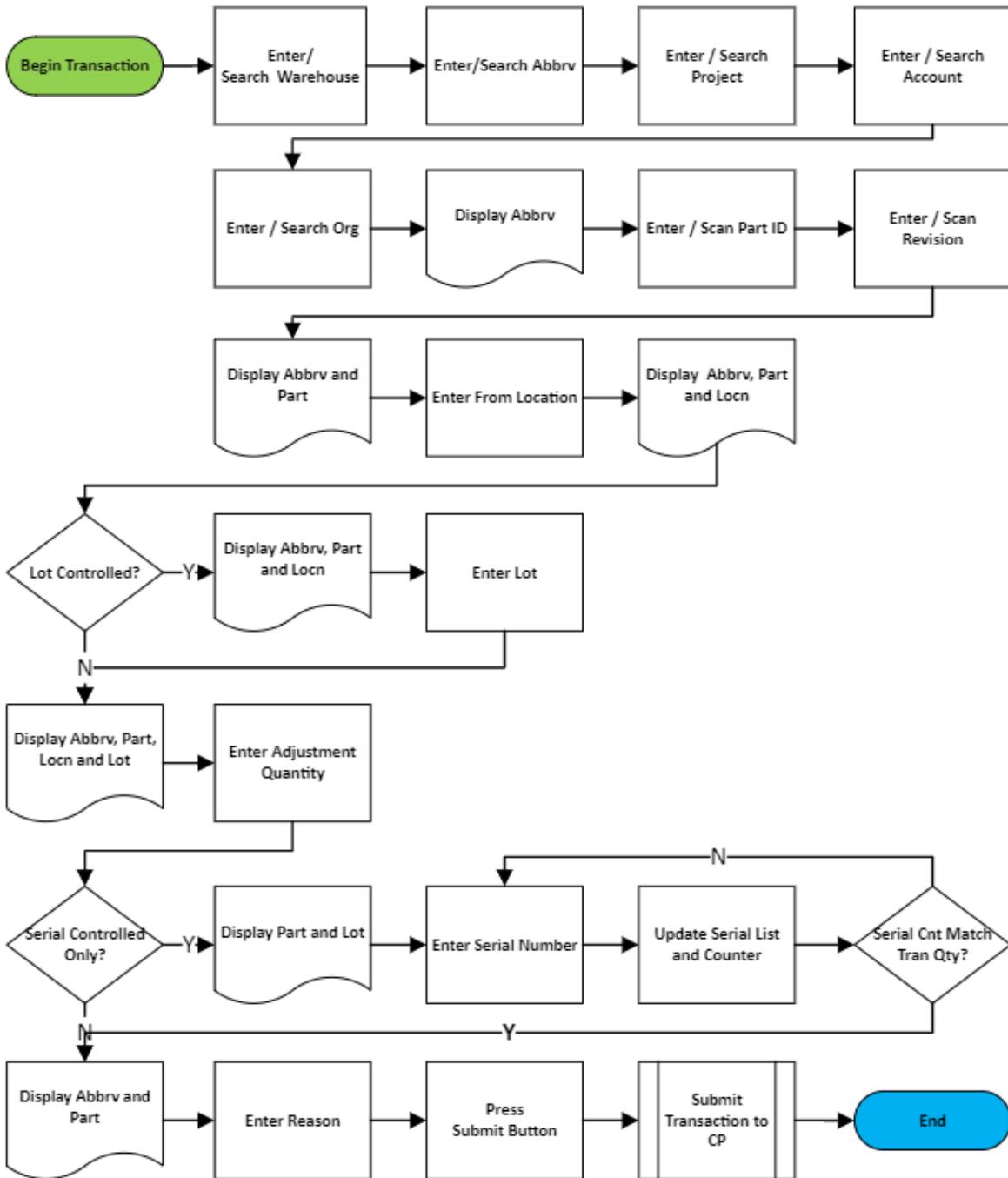
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## RFgen Functional Documentation 2022

RFgen provides its customers Costpoint-validated, ready-to-use suites of 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: Positive Quantity Adjustment Workflow



## FIMIA0300 – Positive Quantity Adjustment



This application will do a positive quantity adjustment.

### Description of Workflow

#### Navigating the App

If the cursor is in the first field, the **back arrow** in the upper left corner, returns you to the menu. For all other fields unless otherwise noted, the back arrow button takes you to the previous field/page.

As the user progresses through the application, the values are posted at the top of the page.

#### Workflow Details

First the Warehouse field displays with the value defaulted from the user's profile. The user can change the warehouse if needed.

Next, the Abbreviation field displays, and the user enters, searches, or scans the abbreviation. The abbreviation is listed at the top of the application.

Then the Project, Account, and Org fields display. The values in these fields are derived from the inventory abbreviation.

In the Part and Revision fields, if the part only has one revision it will be defaulted. Otherwise, the user enters, searches, or scans the part number.



If the revision was not defaulted, the user enters, searches, or scans the revision number. The part and revision are added to the list on top.

Then the From Location field displays, and the user enters, searches, or scans the from location. The location is added to the list at the top when the next screen. The field that displays next depends on how the parts are setup.

### **Lot-Controlled, Serial-Only Controlled, Neither Lot nor Serial-Controlled**

- If the part is lot-controlled, the Lot field displays, and the user enters, searches, or scans the lot number. Then the Quantity field and unit of measure (UoM) display, and the user enters the quantity to be adjusted for the lot previously entered.
- If the part is lot and serial-controlled, the Serial field displays after the lot and quantity to be adjusted are entered. The user enters serials until the count of serials matches the adjustment quantity.
- If the part is only serial-controlled, the Quantity field and unit of measure display, and the user enters the quantity to be adjusted. Then the Serial field displays, and the user enters serials until the count of serials entered matches the adjustment quantity.
- If the part is neither lot nor serial-controlled, the Quantity field and unit of measure (UoM) displays, and the user enters the quantity to be adjusted.
- Pressing the **Continue** button takes the user to the next field.
- Tapping the **back arrow** in the upper left corner will reset the data collected for the current line back to the Quantity screen.

When the Adjustment Reason field displays, the user enters, searches, or scans the reason code for the adjustment. The user taps the **Submit** button.

- Tapping the **back arrow** in the upper left corner will reset the data collected for the current line back to the Quantity screen.
- Tapping the **Submit** button will send all the collected data to Costpoint for transacting, reset the form and place the cursor in the Warehouse field.



## 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?

