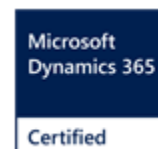# Microsoft Dynamics 365
SALES & SHIPPING –
TRANSFER ORDER PACK

This application is used to pack and ship the inventory items registered in a Transfer Order Pick. Items are submitted with an outbound inventory receipt.
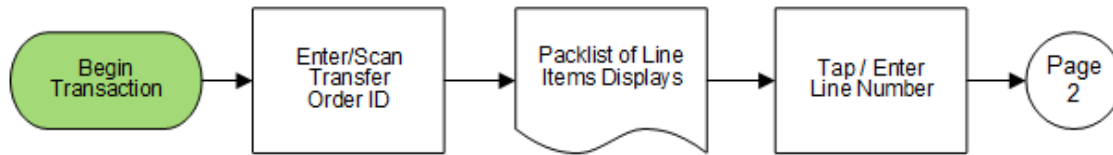
RFgen Functional Documentation

2021

RFgen provides its customers Dynamics-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.
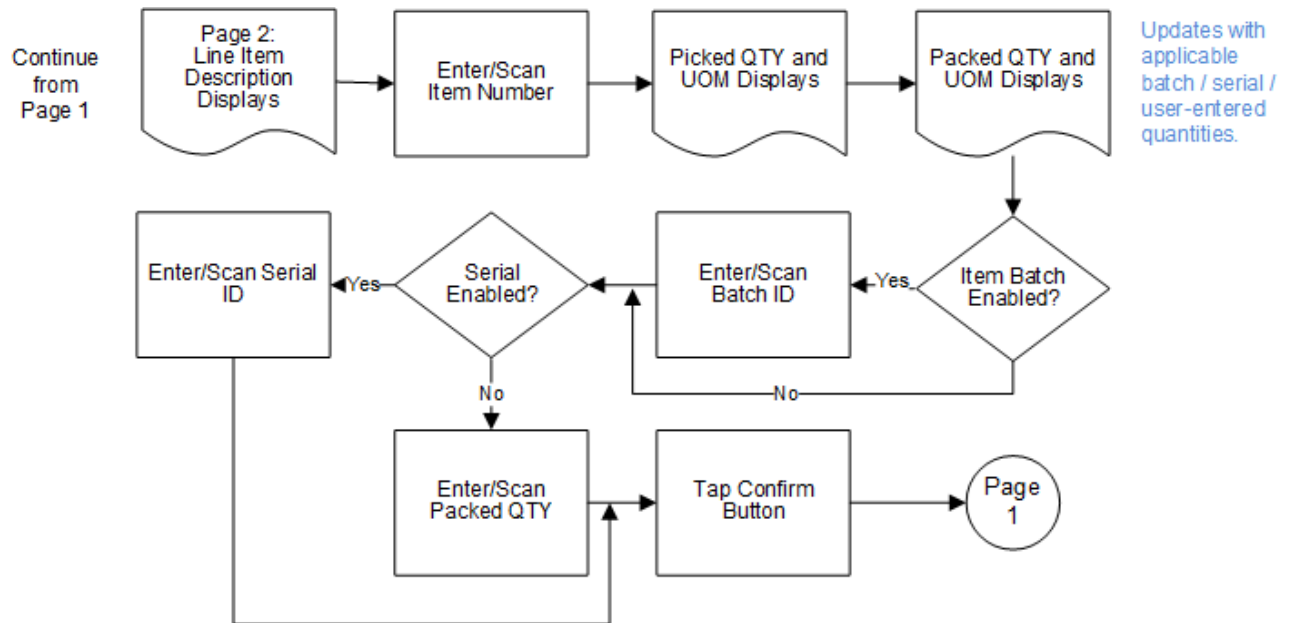
This document describes the business workflow, technical information, and analysis questions for planning customizations to this application.
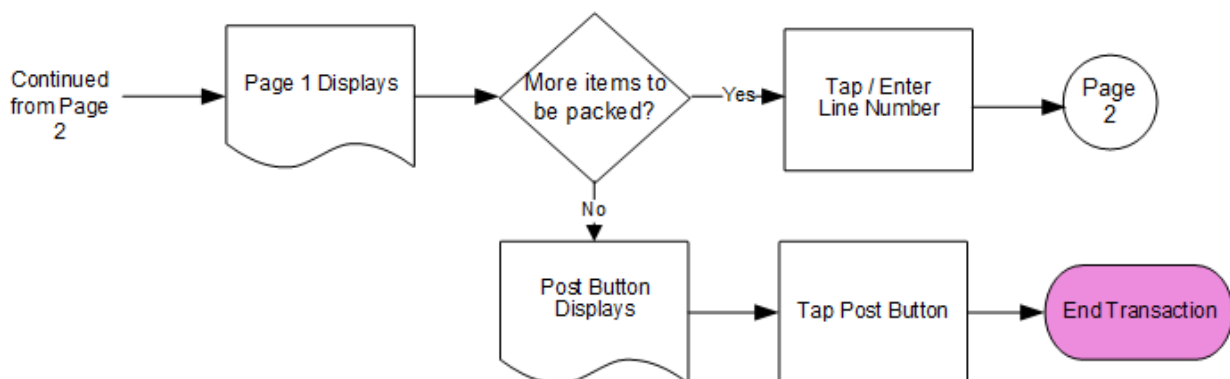
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Microsoft Dynamics: Outbound Orders – Sales Order Pack (1 of 3)

```
Begin Transaction → Enter/Scan Transfer Order ID → Packlist of Line Items Displays → Tap / Enter Line Number → Page 2
```

Microsoft Dynamics: Outbound Orders – Sales Order Pack (2 of 3)

Continue from Page 1

```
Page 2: Line Item Description Displays → Enter/Scan Item Number → Picked QTY and UOM Displays → Packed QTY and UOM Displays
```

Updates with applicable batch / serial / user-entered quantities.

```
Enter/Scan Serial ID ←Yes— Serial Enabled? ← Enter/Scan Batch ID ←Yes— Item Batch Enabled?

Serial Enabled? —No→ Enter/Scan Packed QTY

Item Batch Enabled? —No→

Enter/Scan Packed QTY → Tap Confirm Button → Page 1
```

Microsoft Dynamics: Outbound Orders – Sales Order Pack (3 of 3)

Continued from Page 2

```
Page 1 Displays → More items to be packed? —Yes→ Tap / Enter Line Number → Page 2

More items to be packed? —No→ Post Button Displays → Tap Post Button → End Transaction
```

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FOBTPA400 – Transfer Order (TO) Pack

This application is for the Microsoft Dynamics 365 Finance & Operations ERP. It is used to pack items that were registered in the Transfer Order Pick transaction and ship them from inventory. Items are submitted with an outbound inventory receipt.
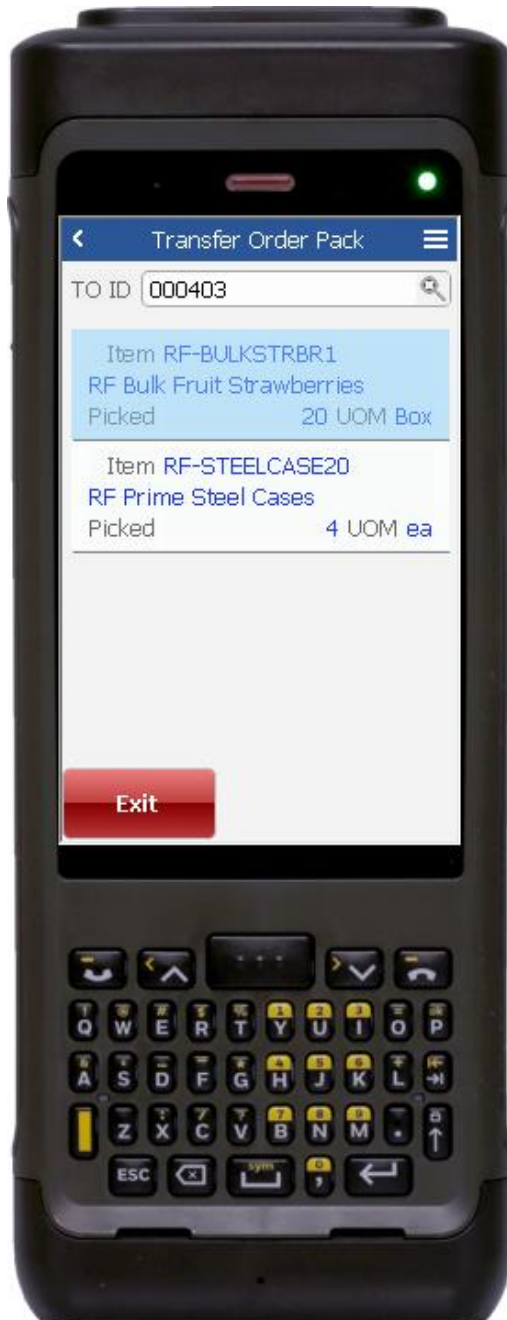
Description of Workflow (Page 1)

The user scans, enters, or searches a transfer order identification (TO ID).

A scrollable list of items to be packed displays.

The user taps or selects a line item to be packed, and is taken automatically to Page 2.

The **Exit** button leaves the application without posting packed items to the Microsoft Dynamics ERP.

Description of Workflow (Page 2)

Fields for entering a batch number or serial number are dependent on the item's Active Tracking Dimensions.

Page 2 fields are populated from the Transaction Order (TO) Pick List registrations performed in the previous TO Pick transaction.

The description for the line item selected from page 1 displays.

The user scans or enters the item number to confirm the picked item.

If batch was enabled, the user scans or enters the batch number to confirm the picked batch.

If serial is enabled, the user scans or enters the serial number to confirm the picked serial.

The serial number field tracks multiple entries.

If there are no serials enabled, then the user manually enters the quantity that was packed to confirm the picked quantity.

The **Packed** button displays.

If the user taps the **Pack** button, the entries are registered (saved) and the user is returned to Page 1.

The **Cancel** button allows the user to cancel the entries and returned to page 1.

On page 1, the line item for items packed on page 2 is removed from the TO Pack list on Page 1.

If there are no more items to be packed, the **Post** button appears on Page 1.

The user taps the **Post** button which posts the outbound receipt for packed items to be shipped to the ERP.

Technical Information

This lists the tables used for validations, searches, and defaults by prompt.

Prompt	Table
TO ID	INVENTTRANSFERTABLE
Picked Items List	WMSORDERTRANS
Item definitions	ECORESRELEASEDPRODUCTV2ENTITY, ECORESTRACKINGDIMENSIONGROUPENTITY, ECORESSTORAGEDIMENSIONGROUPENTITY, INVENTTABLE
Picked Item Details	WMSORDERTRANS

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. How many steps of validation are required for complete packing?

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