# Deltek Costpoint - Inventory Issue to Sales Order
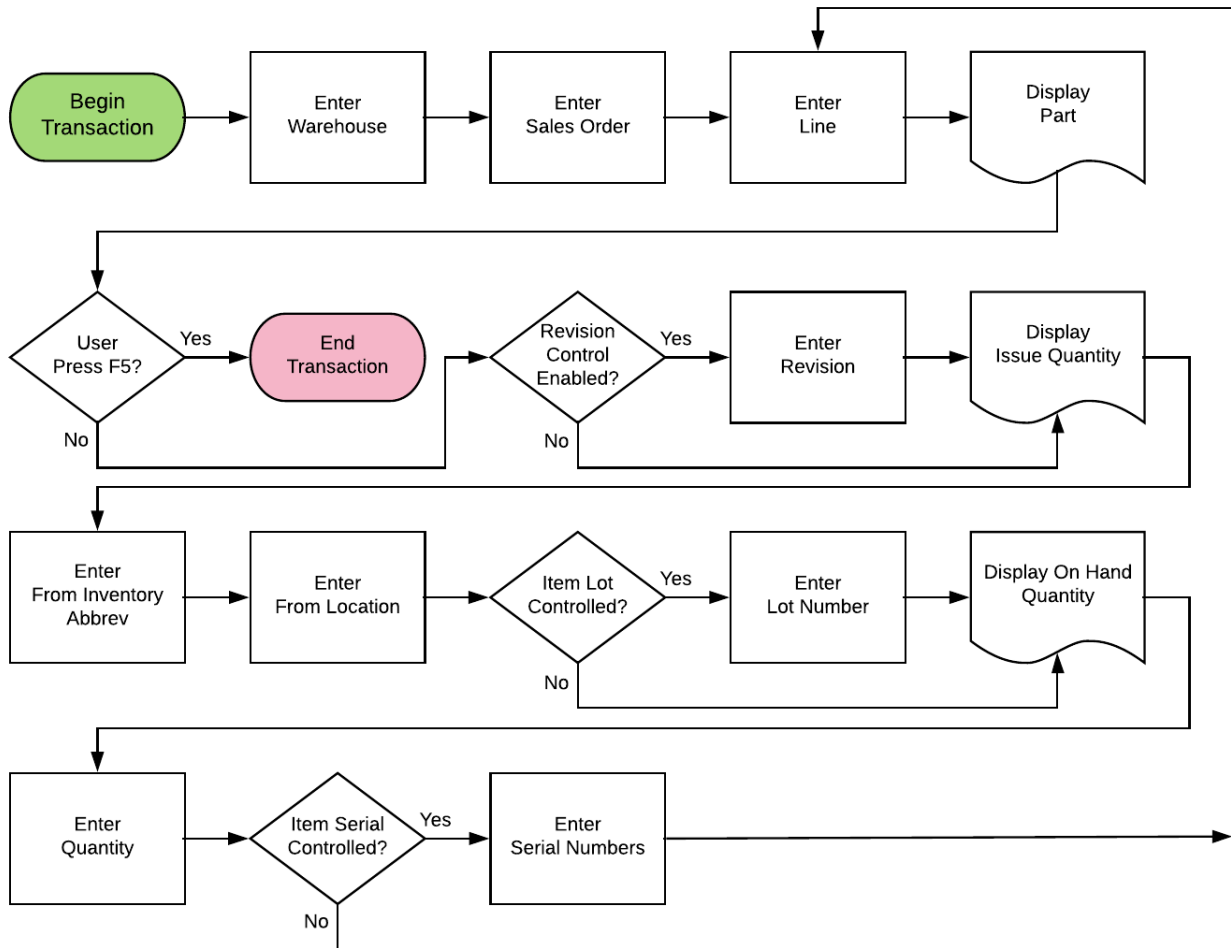
This application issues parts to a sales order.

RFgen Functional Documentation
2019

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: Inventory - Issue to Sales Order Workflow



**Begin Transaction** → **Enter Warehouse** → **Enter Sales Order** → **Enter Line** → **Display Part**

**User Press F5?** — Yes → **End Transaction** ; No ↓

**Revision Control Enabled?** — Yes → **Enter Revision** → **Display Issue Quantity** ; No ↓

**Enter From Inventory Abbrev** → **Enter From Location** → **Item Lot Controlled?** — Yes → **Enter Lot Number** → **Display On Hand Quantity** ; No ↓

**Enter Quantity** → **Item Serial Controlled?** — Yes → **Enter Serial Numbers** ; No ↓

# FIMIS0300 Inventory – Issue to Sales Order

This application issues parts to a sales order.

## Description of Workflow (1 of 2)

First the user scans, searches, or enters a warehouse value if one is not defaulted automatically from the user properties.

The user scans, searches, or enters a sales order.

The release number of the order displays.

The user scans, searches, or enters a line number on the sales order. The parent part number associated to the line displays.

If the sales order line is flagged as having a component line, the Component Line field displays.
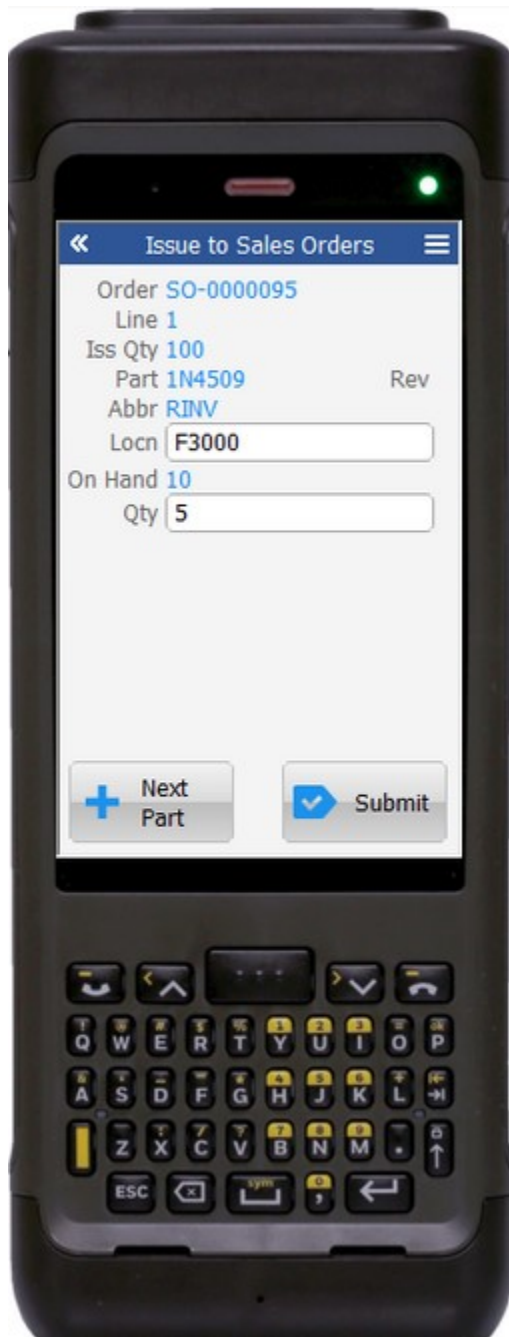
If required, the user will scan, search, or enter the component line number.

After the last visible field on page 1 is validated, the user is taken to page 2.

A **Submit** button may show on page 1 if coming back from page 2 and after accumulating parts to issue. It posts the list of parts to Costpoint and restarts the application.

The arrow in the upper left corner will take the user back to the menu.

## Description of Workflow (2 of 2)

The second page displays the sales order, line number, issue quantity, part number, part revision, and abbreviation.

The user scans, searches, or enters a location. The on-hand quantity for that part and location displays.

If the part is Lot controlled, the user scans, searches, or enters a lot number.

The on-hand quantity will be recalculated including the lot value and display.

The user enters the quantity of the part they wish to issue to the sales order.

If the part is serial-controlled, the user scans, searches, or enters a serial number.

A counter to the right of the serial field accumulates how many serials are entered.

The focus stays in the Serial field until the same number of entries matches the quantity to issue.

If the user presses **Enter** with the field blank, the application reduces the issue quantity to the number of serials entered.

If the user taps the **Next Part** button, the entered values are stored and accumulated with other parts until the **Submit** button is tapped on either page 1 or page 2.
The application will then reset back to the Line field.

If the user taps the **Submit** button, the application posts all the parts to Costpoint and restarts the application.

The double arrows in the upper left corner will take the user back to page 1.

## Technical Information

The following describes the tables used for validation, search lists, or functions for a given prompt in this application. If applicable, the default property is also included.

| Prompt | Validation / Search – Tables / Web Method |
|---|---|
| Whse | WHSE |
| Order | SO_HDR |
| Line | SO_LN / PART / ITEM |
| Comp Ln | SO_LN_COMP |
| Locn | WHSE_LOC / INVT_WHSE_LOC |
| Lot | INVT_WHS_LOC_SR_LT |
| Qty | |
| Serial | INVT_WHS_LOC_SR_LT |
| App Update | OEMISSU web service |

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