

Transfer Orders

[Make](#)[Ship](#)[Receive](#)

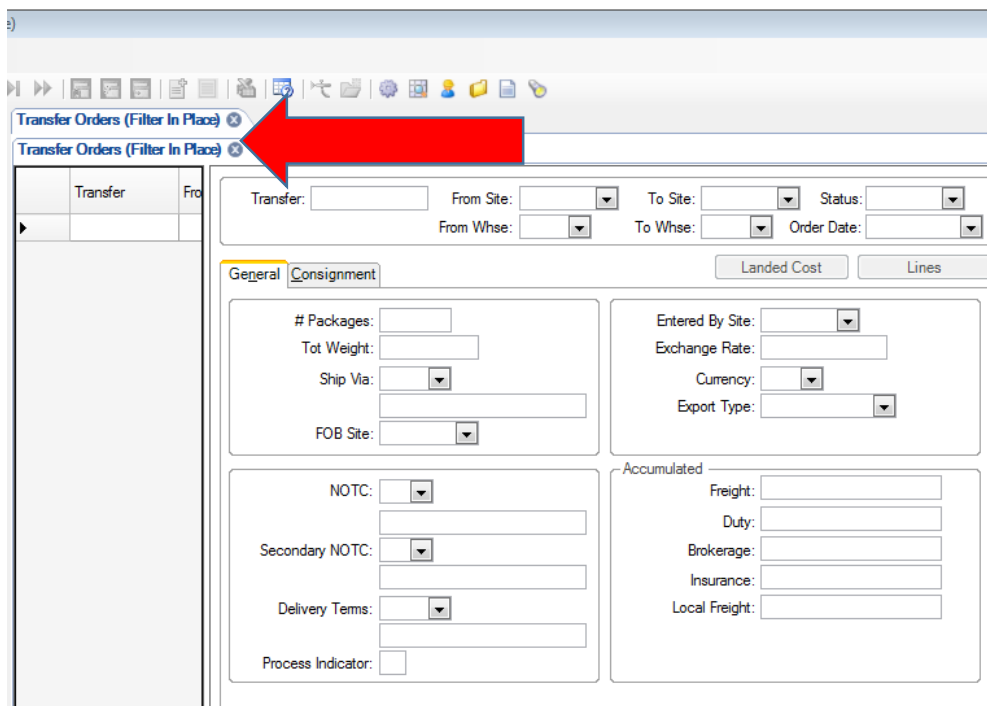
To make a transfer order:

1. Open the "Transfer Orders" form
2. Click the magnifying glass to release the filter
3. Click the new button
4. Fill in the following
 - a. From Site and To Site will always be WTF and they will auto fill
 - b. From Whse: and To Whse: is the warehouse that is shipping the item(From Whse) and the warehouse that is receiving the item(To Whse)
 - c. Status needs to be "Ordered" to show up in the vendor portal
 - d. "Order Date" needs to be the date that item will ship out of the warehouse to vendor
 - e. "# Packages"
 - f. "Tot. Weight"
 - g. "Ship Via"
5. Save
6. If any notes are necessary put them in by clicking the notes button



7. Click the "Lines" button to enter the item info
8. Fill in the following
 - a. Start with the "Item" # and press tab to auto fill in the description and pricing
 - b. In the "Quantity" field put the total # of Items that are going to the vendor
 - c. "Sched Ship Date:" is the date Item will be leaving the shipping warehouse
 - d. "Sched Rcvd Date:" is the date Item will get to the Receiving warehouse
 - e. "Transit Loc"
9. Save

1. Open the "Transfer Orders" form



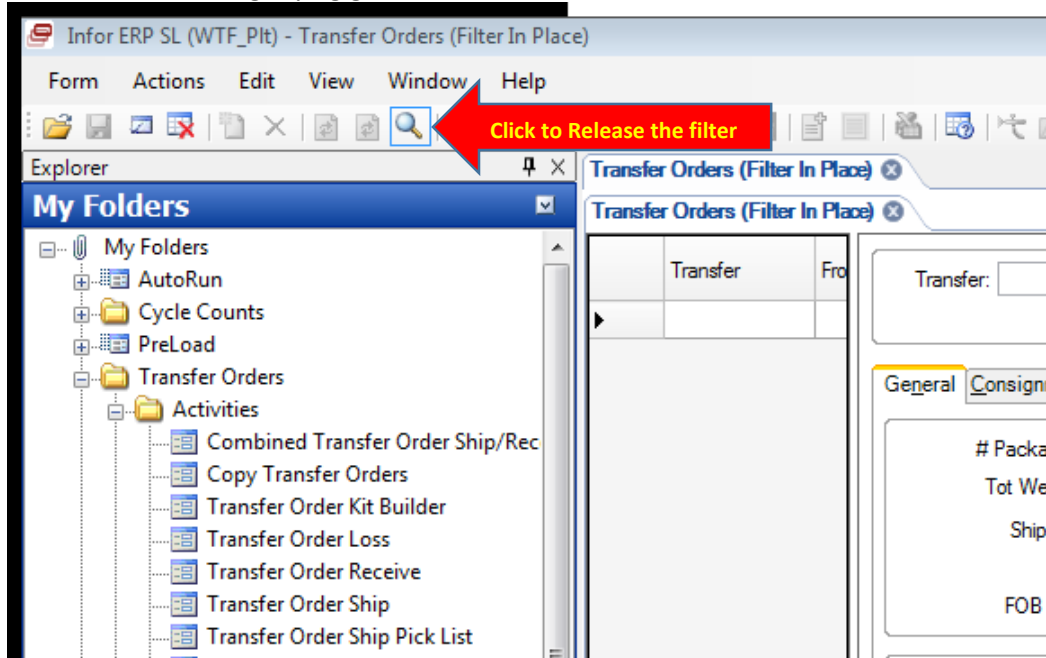
Transfer Orders

[Make](#)

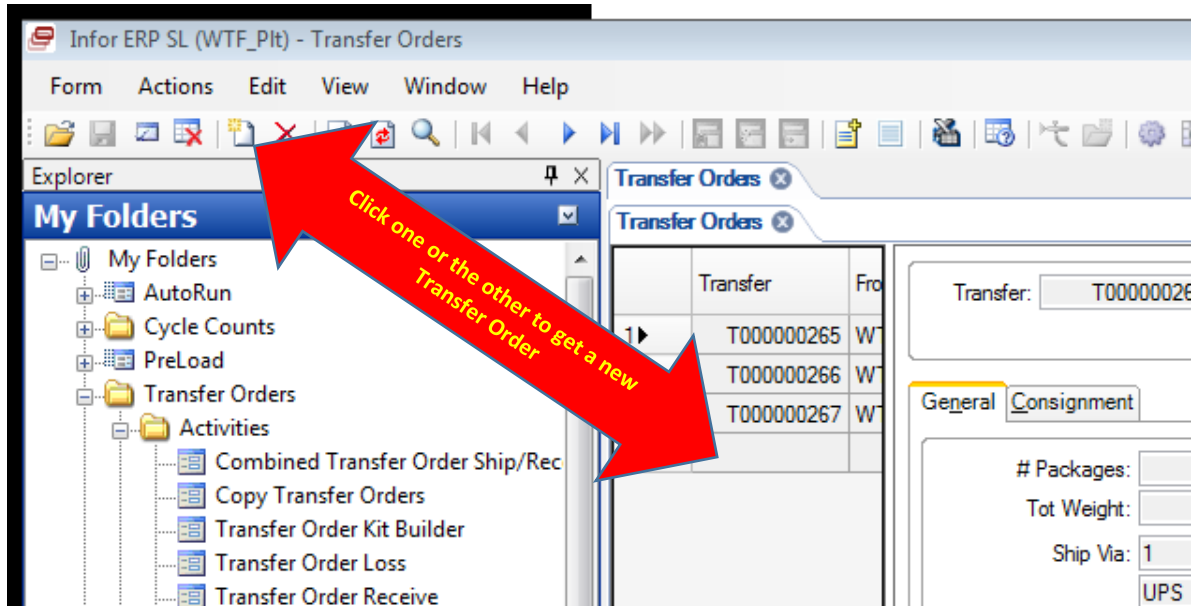
[Ship](#)

[Receive](#)

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3. Click the new button



Transfer Orders

[Make](#)

[Ship](#)

[Receive](#)

4. Fill in the following
 - a. From Site and To Site will always be WTF and they will auto fill
 - b. From Whse: and To Whse: is the warehouse that is shipping the item(From Whse) and the warehouse that is receiving the item(To Whse)
 - c. Status needs to be "Ordered" to show up in the vendor portal
 - d. "# Packages"
 - e. "Tot. Weight"
 - f. "Ship Via"

The screenshot shows the 'Transfer Orders' form in a software application. The form has a table on the left with columns 'Transfer', 'From Site', and 'From Whse'. The table contains four rows of data. The main form area has several sections: 'General' and 'Consignment' tabs, 'Shipping Warehouse' section, 'Enter the # of packages here' section, 'Enter the Carrier here' section, 'Total Weight here' section, 'Exchange Rate' section, 'Currency' section, 'Export Type' section, 'Accumulated' section, and 'Process Indicator' section. Red arrows point to various fields with labels: 'Shipping Warehouse' points to the 'From Whse' field, 'Enter the # of packages here' points to the '# Packages' field, 'Enter the Carrier here' points to the 'Ship Via' field, 'Total Weight here' points to the 'Tot Weight' field, 'Exchange Rate' points to the 'Exchange Rate' field, 'Currency' points to the 'Currency' field, 'Export Type' points to the 'Export Type' field, 'Accumulated' points to the 'Accumulated' section, and 'Process Indicator' points to the 'Process Indicator' field. A yellow box says 'These 2 auto fill and do not need to be changes' pointing to the 'From Site' and 'To Site' fields. A red arrow points to the 'Status' field with the text 'Set to Ordered to show up on the vendor portal!'. The 'Status' field is set to 'Ordered'.

Transfer	From Site	From Whse
1	T000000265	W
2	T000000266	W
3	T000000267	W
4 (n)	T000000268	W

Transfer: From Site: WTF To Site: WTF Status: Ordered

From Whse: To Whse: Order Date: 09/26/2013

General Consignment

Packages: 0 By Site: Exchange Rate: 1.000

Tot Weight: 0.00 Currency: USD

Ship Via: Export Type: Non-Ex

FOB Site: WTF

NOTC: Accumulated

Secondary NOTC: Freight: 0.00

Delivery Terms: Duty: 0.00

Process Indicator: Brokerage: 0.00

Insurance: 0.00

Local Freight: 0.00

5. Save

The screenshot shows the 'Infor ERP SL (WTF_Plt) - Transfer Orders' window. The window has a menu bar (Form, Actions, Edit, View, Window, Help) and a toolbar. The 'Explorer' pane on the left shows a tree view with folders like 'My Folders', 'AutoRun', 'Cycle Counts', 'PreLoad', 'Transfer Orders', and 'Activities'. The 'Transfer Orders' folder is selected. The main window displays the 'Transfer Orders' form, which is the same as the one in the previous screenshot. A red arrow points to the 'Save' button in the 'Actions' menu.

Form Actions Edit View Window Help

Explorer

My Folders

AutoRun

Cycle Counts

PreLoad

Transfer Orders

Activities

Combined Transfer Order Ship/Rec

Copy Transfer Orders

Transfer Order Kit Builder

Transfer Order Loss

Transfer Orders

Transfer Order Line Items (Linked)

Transfer: T000000268

From:

From:

General Consignment

Packages: 25

Tot Weight: 75

Ship Via: 13

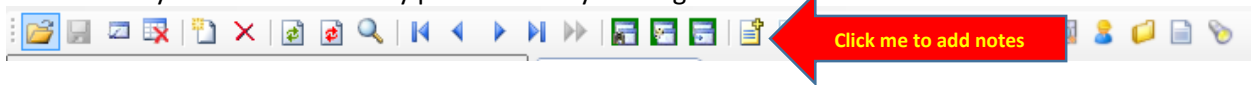
Transfer Orders

[Make](#)

[Ship](#)

[Receive](#)

6. If any notes are necessary put them in by clicking the notes button



7. Click the "Lines" button to enter the item info

Transfer	From Site	To Site	Status
1	T000000265	WTF	Ordered
2	T000000266	WTF	Ordered
3	T000000267	WTF	Ordered
4	T000000268	WTF	Ordered

Transfer: T000000268 From Site: WTF To Site: WTF Status: Ordered
From Whse: KMC To Whse: MAIN Order Date: 09/26/2013

General Consignment

Packages: 25
Tot Weight: 75.00
Ship Via: 13
WIRETECH TRUCK
FOB Site: WTF

Entered By Site: WTF
Exchange Rate: 1.000
Currency: USD
Export Type: Non-Export

8. Fill in the following

- a. Start with the "Item" # and press tab to auto fill in the description and pricing
- b. In the "Quantity" field put the total # of Items that are going to the vendor
- c. "Sched Ship Date:" is the date Item will be leaving the shipping warehouse
- d. "Sched Rcvd Date:" is the date Item will get to the Receiving warehouse
- e. "Transit Loc"

Transfer: T000000268 From Site: WTF To Site: WTF Status: Ordered
From Whse: KMC To Whse: MAIN Order Date: 09/26/2013

Line: 1
Item: [Field]
Price Code: [Field]
[] Kit [] Preassign Lots [] Preassign Serials

Status: Ordered
Quantity: 0.000
Unit Price: 0.00000
Unit Cost: 0.00000
Extended Price: 0.00000

Detail Costs EU VAT Lots Serials

Sched Ship Date: [Field] Sched Rcvd Date: [Field]
Projected: [Field]

Transit Loc: [Field]

Shipped: 0.000
Received: 0.000
Qty Loss: 0.000

Available: 0.000

Get CTP
Transfer Orders
Source
Component Shortages

Transfer Orders

[Make](#)

[Ship](#)

[Receive](#)

9. Save

The screenshot shows the 'Transfer Order Line Items (Linked)' form in Infor ERP SL. The 'Form' menu is open, and a red arrow points to the 'Save' button. The form displays a table of transfer orders with columns: Transfer, From Site, and To Site. The first row shows Transfer: T000000268, From Site: WTF, To Site: WTF. The right pane shows details for Line 1, including Item: 747-05362A, Quantity: 500.000, Unit Price: 1.86560, and Extended Price: 932.80. The 'Status' is 'Ordered'. The 'Sched Ship Date' and 'Sched Rcvd Date' are both 09/26/2013. The 'Transit Loc' is 'TRANSIT KMC'.

To Ship a Transfer Order:

1. Open "Transfer Order Ship"
2. Enter the transfer #
3. Enter the "Quantity"
4. Enter the "Ship Date"
5. Click the "Ship" button

1. Open "Transfer Order Ship" form

The screenshot shows the 'Transfer Order Ship' form in Infor ERP SL. A red arrow points to the 'Transfer Order Ship' button in the top toolbar. The form displays fields for Transfer, Line, Item, and Description. The 'Transfer' field is empty, 'Line' is 0, and 'Item' is empty. The 'Description' field is empty. The 'From Site' and 'From Warehouse' fields are also empty.

Transfer Orders

[Make](#)[Ship](#)[Receive](#)

2. Enter the following
 - a. Transfer #
 - b. Enter the "Quantity"
 - c. Enter the "Ship Date"
 - d. Click the "Ship" button

The screenshot shows the 'Transfer Order Ship' form with the following fields and annotations:

- Transfer:** T000000271 (Annotated: "Pick from the list or type transfer #")
- Line:** 1
- Item:** 580659302
- Description:** HOP 580659302 BAIL DRIVE CURVED SS
- Quantity Requested:** 1,000.000 EA
- Shipped:** 0.000
- On Hand:** 0.000
- ☐ Transfer Item With Zero Cost
- From Site:** WTF
- From Warehouse:** KMC
- To Site:** WTF
- To Warehouse:** MAIN
- Detail** | **Serial Numbers** | **Pieces** (Tabs)
- From Location:** STOCK
- From Lot:** (Empty)
- Import Document ID:** (Empty)
- Quantity:** 0.000 EA (Annotated: "Enter the QTY that is being shipped")
- Ship Date:** 09/26/2013 (Annotated: "This is the date that item will be out the door")
- Reason Code:** (Empty)
- Export Document ID:** (Empty)
- Transit Location:** Trans
- To Lot:** (Empty)
- Click me last** (Green arrow pointing to the Ship button)
- Ship** (Button)

Transfer Orders

[Make](#)[Ship](#)[Receive](#)

Receive a Transfer Order:

1. Open "Transfer Order Receive" form
2. Fill in the following
 - a. "Transfer:" order # use the drop down menu or type the order #
 - b. "Quantity" This should equal the amount that came in
 - c. "Received Date" This should be the date Item is being received
 - d. Click the Receive button

1. Open "Transfer Order Receive" form

The screenshot shows the 'Transfer Order Receive' form. A red arrow points to the 'Transfer Order Receive' tab. The form contains the following fields:

Field	Value
Transfer:	[Dropdown]
Status:	Ordered
Quantity Requested:	0.000
Line:	0
Transfer Item With Zero Cost:	<input type="checkbox"/>
Shipped:	0.000
Item:	[Dropdown]
Received:	0.000
Description:	
Last Received:	

2. Fill in the following
 - a. "Transfer:" order # use the drop down menu or type the order #
 - b. "Quantity" This should equal the amount that came in
 - c. "Received Date" This should be the date Item is being received
 - d. Click the Receive button

The screenshot shows the 'Transfer Order Receive' form with the following fields filled in:

Field	Value
Transfer:	T000000270
Line:	1
Transfer Item With Zero Cost:	<input type="checkbox"/>
Item:	580659302
Description:	HOP 580659302 BAIL DRIVE CURVED SS
Quantity Requested:	1,000.000
Shipped:	1,000.000
Received:	0.000
Last Received:	
From Site:	WTF
From Warehouse:	MAIN
To Site:	WTF
To Warehouse:	KMC
To Location:	STOCK
To Lot:	
Quantity:	1,000.000
Received Date:	09/26/2013
Reason Code:	
Freight:	0.00000
Insurance:	0.00000
Local Freight:	0.00000

Annotations:

- Red arrow pointing to 'Transfer:' with text: **Transfer Order # here**
- Green arrow pointing to 'Receive' button with text: **Click me last**
- Red arrow pointing to 'Quantity:' with text: **Quantity Received here**
- Red arrow pointing to 'Received Date:' with text: **Receive Date here**