

User guide transer TRANSFER ORDERS

Contents

- 1 Transfer orders 2
 - 1.1 Create the transfer order 2
 - 1.2 Pick the transfer order lines..... 3
 - 1.3 Ship transfer order 6
 - 1.4 Receive transfer order 7
 - 1.5 Exceptions..... 9

1 Transfer orders

1.1 Create the transfer order

Go to Inventory management > Inbound orders > Transfer order in the legal entity where the products need to be transferred. Click New.

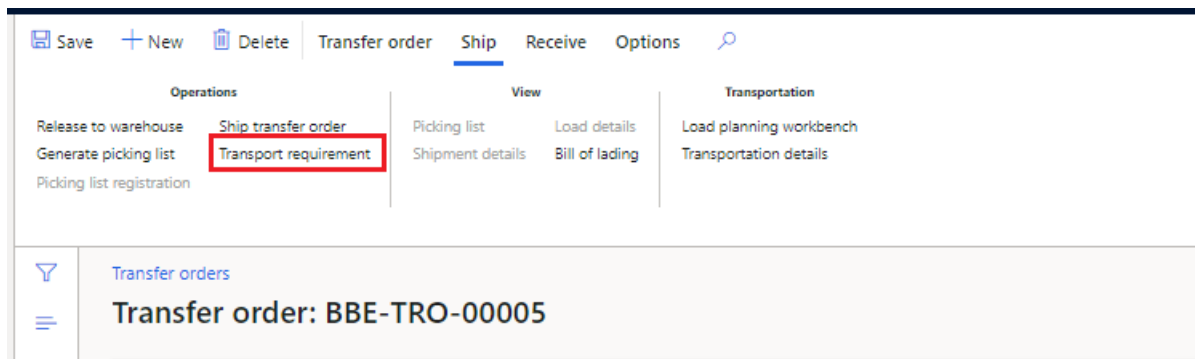
Fill in the following fields on the header:

- From warehouse
- To warehouse
- Ship date
- Receipt date

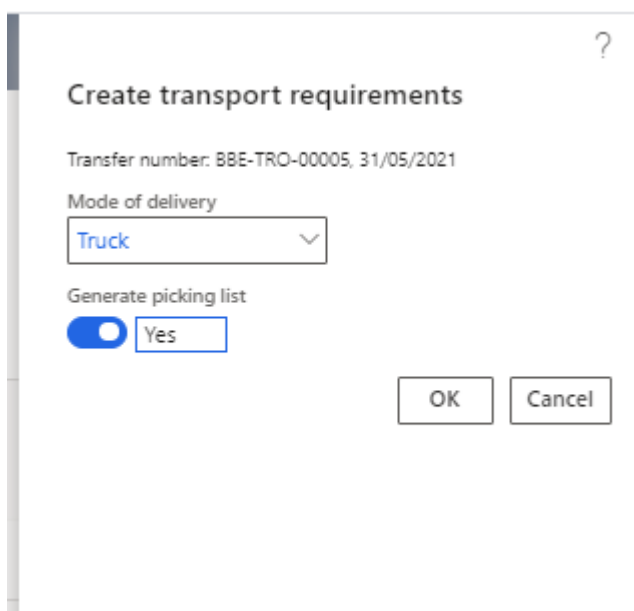
Add transfer order lines for the products that need to be transferred. If a default quantity is set up on the product, this will be prefilled. If desired, modify the quantity.

1.2 Pick the transfer order lines

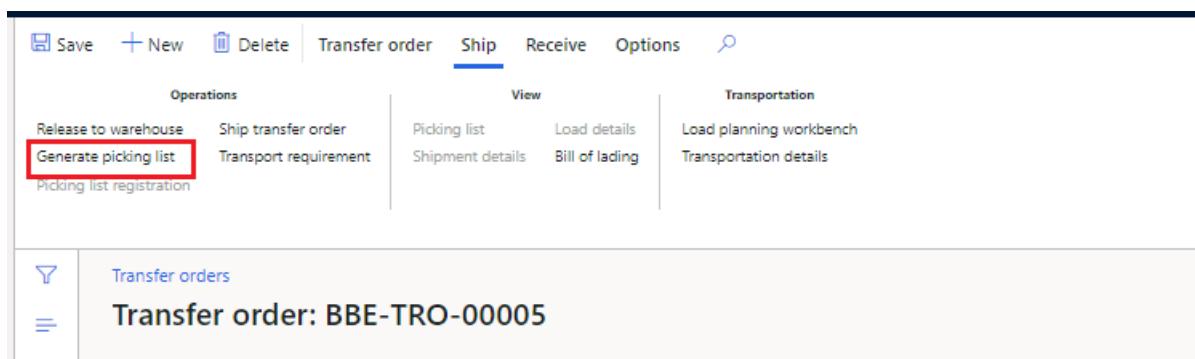
When a transport is required, generate the picking list using the “transport requirement” button.



Select the mode of delivery for the transport and check the “Generate picking list” checkbox.



If no transport is required, create the picking list through the “generate picking list” button on the action pane under “Ship”.



Set the 'Update' column to all (preferably do so in the default values, to have this setting per standard). If the picking list should be generated for another quantity, modify the line details.

?

Posting picking list

PARAMETERS

Late selection

☒ No

Overview General

Select Default values

✓		Transfer number	Update	Print picking list
✓	✓	BBE-TRO-00005	All	<input type="checkbox"/>

Lines

Inventory ▾

✓	Item number	Trademark	Country	Pick quantity	CW pick quantity	Batch number
	10010-03	NARITA	NL	360,00		

Click OK, the picking list is generated.

To execute the picking, click "Picking list registration" in the action pane.

Finance and Operations Search for a page

Save + New Delete Transfer order Ship Receive Options

Operations View Transportation

Release to warehouse Ship transfer order Picking list Load details Load planning workbench
Generate picking list Transport requirement Shipment details Bill of lading Transportation details

Picking list registration

Operation completed

Transfer orders

Transfer order: BBE-TRO-00005

Transfer order header

OVERVIEW

Transfer number: BBE-TRO-00...

From warehouse: Dandoy

To warehouse: Giobach

Ship date: 31/05/2021

Receipt date: 31/05/2021

STATUS

Transfer status: Created

On the lines, update the batch number that will be transferred (if some inventory dimensions are not shown add them through inventory > display dimensions). When the batch number is defined, update the picking through Update > update all.

Finance and Operations Search for a page

Save + New Delete Updates Functions Print Options

Update all

Personalize Always open for editing Personalize this page Add to workspace

Security diagnostics Advanced filter or sort

Record info Go to

Edit Revert

Options Get a link Create a custom alert Manage my alerts

Picking list registration | BBE-TRO-00005 : 31/05/2021

BBE-PIL-00003

Identification

Picking route: BBE-PIL-00003

Handling status: Activated

Shipment: SHP000003

Reference: Transfer order shipment

Number: BBE-TRO-00005

Picking route details

Handling

Statistics

Delivery

Lines

Functions Output orders Inventory Register serial numbers

Select	Handling status	Item number	Trademark	Country	Pick quantity	CW pick quantity	Warehouse	Batch number
<input type="checkbox"/>	Activated	10010-03	NARITA	NL	360,00		Dandoy	B2505a

Exception: when multiple batch numbers need to be transferred for one line, split the picking list line using functions > split, before defining the batch number.

The transfer order is now picked.

1.3 Ship transfer order

Click "Ship transfer order" in the action pane, under "Ship".

SaveNewDeleteTransfer orderShipReceiveOptions

Operations

Release to warehouse
Generate picking list
Picking list registration

Ship transfer order

Transport requirement

View

Picking list
Shipment details

Load details
Bill of lading

Transportation
Load planning workbench
Transportation details

Operation completed

Transfer orders

Transfer order: BBE-TRO-00005

Transfer order header

OVERVIEW

Transfer number

BBE-TRO-00...

From warehouse

Dandoy

To warehouse

Globach

Ship date

31/05/2021

Receipt date

31/05/2021

STATUS

Transfer status

Created

Transfer order lines

+ Add+ Add productsRemoveWork detailsChargesDeliver remainderInventoryDocument notesTransport orderFunctionsInquiriesSetup

Item number	Trademark	Country	Batch number	Transfer quantity	CW transfer qty	Ship date	Receipt date	Product name
10010-03	NARITA	NL		360,00		31/05/2021	31/05/2021	NARITA 2 x 10 LT / NARITA 2 x 1...

The field update should be set to "Picked quantity" (can be defaulted under the default values).

Shipment

Late selection

No

Overview

General

Select

Default values

Transfer number	Update	Posting date	Tracking ID	Explosive lines	Autonomous	Print transfer shipment	Print product la...	Print shelf labels
BBE-TRO-00005	Picked quantity	31/05/2021						

Lines

General

Dimensions

Inventory

Item number	Product name	Trademark	Country	Batch number	CW ship now	Ship quantity	Close
10010-03	NARITA 2 x 10 LT / NARITA 2 x 1...	NARITA	NL			360,00	

OK

Batch

Cancel

Click OK, the stock is shipped from the origin warehouse. In the system, the stock is issued from the origin warehouse, and temporarily received on a transit warehouse.

Inventory transactions | BBE-TRO-00005 | 10010-03

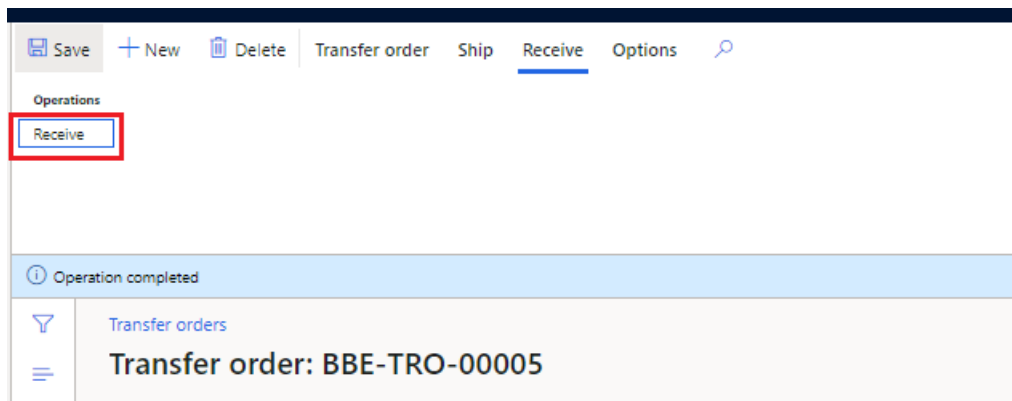
Product number	Item number	Physical date	Financial date	Reference	Number	Receipt	Issue	Quantity	Unit	Cost ...	Trademark	Country	Site	Warehouse	Batch number
10010NARITANL2 x 10 LT	10010-03	31/05/2021	31/05/2021	Transfer order shipment	BBE-TRO-000...		Sold	360,00	LT		NARITA	NL	OP	Dandoy	82505a
10010NARITANL2 x 10 LT	10010-03	31/05/2021	31/05/2021	Transfer order shipment	BBE-TRO-000...	Purchased		360,00	LT		NARITA	NL	OP	Dandoy_T	82505a

inetum.
realdolmen

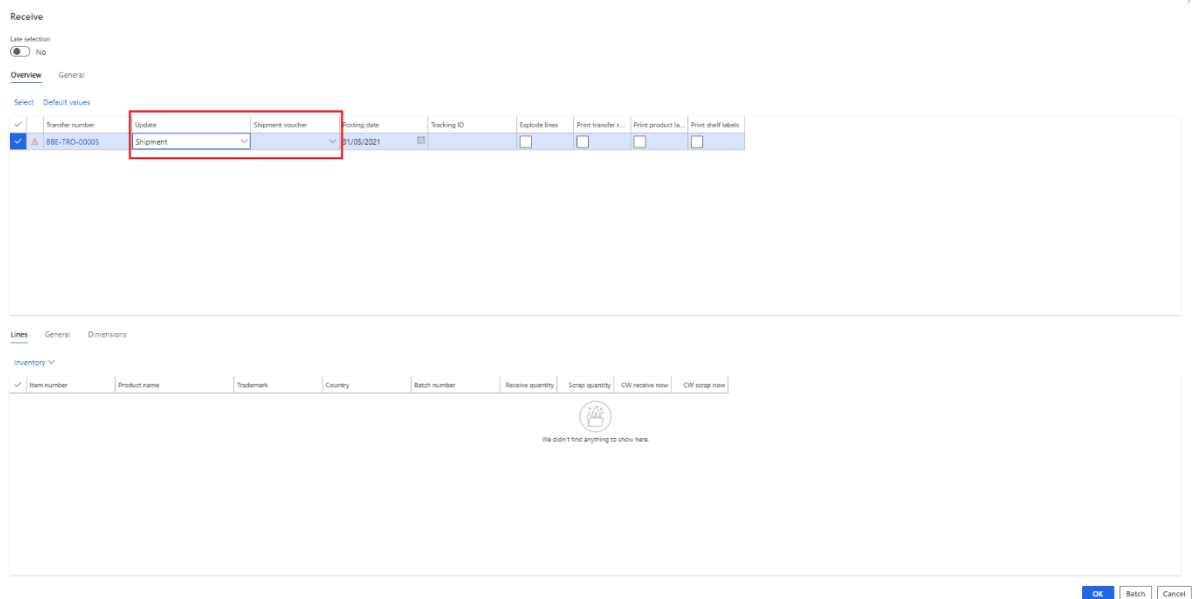
6 / Error! Unknown switch argument.

1.4 Receive transfer order

Click "Receive" on the action pane under tab Receive.



Set the update column to "Shipment" to receive a previously shipped shipment. Select which shipment should be received (it is possible that a TO was sent in multiple shipments).



Receive

Label selection

☒ No

Overview General

Select Default values

✓	Transfer number	Update	Shipment voucher	Posting date	Tracking ID	Explode lines	Print transfer r...	Print product la...	Print shelf labels
✓	886-TRO-00005	Shipment	TOV000000008	31/05/2021		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Lines General Dimensions

Inventory

✓	Item number	Product name	Trademark	Country	Batch number	Receive quantity	Scrap quantity	OW receive now	OW scrap now
	10010-03	NARITA 2 x 10 LT / NARITA 2 x 1...	NARITA	NL		360,00			

OK Batch Cancel

Click OK, the TO is received and the inventory is transferred from the transit warehouse to the destination warehouse.

Transaction details Display dimensions Summation Split Inventory Ledger Options														
Inventory transactions 886-TRO-00005 10010-03														
Transaction filter														
✓	Product number	Item number	Physical date	Financial date	Reference	Number	Receipt	Issue	Quantity	Unit	Cost...	Trademark	Country	Site
	10010NARITA.NL.2 x 10 LT	10010-03	31/05/2021	31/05/2021	Transfer order shipment	886-TRO-000...		Sold	-360,00	LT		NARITA	NL	OP
	10010NARITA.NL.2 x 10 LT	10010-03	31/05/2021	31/05/2021	Transfer order shipment	886-TRO-000...	Purchased		360,00	LT		NARITA	NL	OP
	10010NARITA.NL.2 x 10 LT	10010-03	31/05/2021	31/05/2021	Transfer order receive	886-TRO-000...		Sold	-360,00	LT		NARITA	NL	OP
	10010NARITA.NL.2 x 10 LT	10010-03	31/05/2021	31/05/2021	Transfer order receive	886-TRO-000...	Purchased		360,00	LT		NARITA	NL	OP

1.5 Exceptions

- Autoreceive

It is possible to automatically receive the shipment when it is shipped (when something is transferred without physical movement, e.g. moved to quality warehouse). For this type of scenario, we check "Autoreceive" on the shipment step, this posts the receipt of the shipment immediately.

The screenshot shows the 'Shipment' form with the 'Overview' tab selected. A table lists shipment details. The 'Autoreceive' checkbox is checked and highlighted with a red box.

✓	Transfer number	Update	Posting date	Tracking ID	Explode lines	Autoreceive	Print transfer shipment	Print product la...	Print shelf labels
✓	B8E-TRO-00006	All	31/05/2021		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Close shipment

When a part of the transfer order is shipped, and the remaining part will not be sent out, the shipment can be "closed". This will cancel the remaining quantity. Doing this states that this shipment will be the last shipment for this TO line.

The screenshot shows the 'Shipment' form with the 'Overview' tab selected. Below the shipment table, there is a 'Lines' section with an 'Inventory' sub-tab. A table lists inventory items. The 'Close' checkbox is checked and highlighted with a red box.

✓	Item number	Product name	Trademark	Country	Batch number	CW ship now	Ship quantity	Close
✓	10001-01	MILBEKNOCK IB 9.3 EC 12 x 1 LT...	MILBEKNOCK	NL			1,00	<input checked="" type="checkbox"/>

- Batch posting of shipment/receipt

If there are scenarios where shipments or receipts for certain criteria need to be processed automatically, these processes can be executed in batch treatment.