

User guide transfer TRANSPORT

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1 Manage transport requirement

1.1 Transport requirement creation

A transport requirement can be created from a sales order, a purchase order or a transfer order.

- Purchase order

The screenshot shows the 'Purchase order' tab in the 'Finance and Operations' application. The 'Transport requirement' option is highlighted in the 'Actions' menu. Below the menu, there is a table of purchase orders.

✓	Purchase order ↑	Vendor account	Invoice account	Vendor name	Purchase type	Approval status
	BBE-PO-00130	BBE-V0006	BBE-V0006	GLOBACHEM N.V.	Purchase order	Draft

- Sales order

The screenshot shows the 'Sales order' tab in the 'Finance and Operations' application. The 'Transport requirement' option is highlighted in the 'Generate' menu. Below the menu, there is a table of sales orders.

✓	Sales order ↑	Customer account	Customer name	Order type	Invoice account	Channel
	BBE-SO-00041	BBE-C0009	SANAC NV	Sales order	BBE-C0009	

- Transfer order

The screenshot shows the 'Transfer order' tab in the 'Finance and Operations' application. The 'Transport requirement' option is highlighted in the 'Operations' menu. Below the menu, there is a table of transfer orders.

✓	Transfer nu... ↑	Transfer status	From warehouse	To warehouse	Ship d
---	------------------	-----------------	----------------	--------------	--------

Generating the transport requirement will prompt following screen:

?

Create transport requirements

Transfer number: BBE-TRO-00056, 12/10/2021

Mode of delivery

Truck

Generate picking list

☒ Yes

Notes for transport

MMITEST

OK Cancel

Define the mode of delivery, set generate picking list to YES and if required, enter text in the notes for transport field. These notes will be displayed on the transport requirement (grid and form) as well as on the Transport order lines.

Then click OK. This will create a transport requirement for the order lines.

Navigate to Transport Planning > Transport > Common > Transport requirement to get an overview of all transport requirements.

Finance and Operations

Search for a page

Save + New Delete Transport requirement Options

Actions Release for transport Cancel Setup Controls Transport order Create transport order Add to transport order Order

Transport requirement

Filter Show canceled

Transport re...	Company accounts ID	Reference	Number	Item number	Product name	Trademark	Configuration	Quantity	Unit	Load date	Delivery date	From city
TR-00001	BBE	Sales order	BBE-SO-00088	10001-01	MILBENCKOCK IB 9.3 EC 12 X 1 LT...	MILBENCKOCK	BE	10.800,00	LT	13/10/2021	13/10/2021	Aase

Note that once the requirement (or transport order) is created it is possible to navigate from each of these orders to the transport requirement (or transport order).

- Purchase order

New

Delete

Workflow

Purchase order

Purchase

Manage

Receive

Invoice

Retail

Warehouse

New

Maintain

Copy

View

Attachments

From a sales order

Request change

From all

Totals

Document notes

Cancel

From journal

Transport order

Transport requirement

All purchase orders

Filter

Purchase order	Vendor account	Invoice account	Vendor name	
BBE-PO-00130	BBE-V0006	BBE-V0006	LOBACHEM N.V.	Pt
BBE-PO-00133	BBE-V0071	BBE-V0071	ISK BIOSCIENCES EUR - VAT ITA	Pt
BBE-PO-00135	BBE-V0006	BBE-V0006	LOBACHEM N.V.	Pt
BBE-PO-00136	BBE-V0006	BBE-V0006	LOBACHEM N.V.	Pt

- Sales order

New

Delete

Sales order

Sell

Manage

Pick and pack

Invoice

Retail

General

Warehouse

Transportation

Credit management

Options

New

Maintain

Payments

Copy

View

Functions

Attachments

Service order

Cancel

Payments

From all

Totals

Order credit

Notes

Purchase order

Direct delivery

From journal

Order events

Transport order

Recap

Document notes

Transport requirement

Order holds

All sales orders

Filter

Sales order	Customer account	Customer name	Order type	Invoice account	Channel
BBE-SO-00041	BBE-C0009	SANAC NV	Sales order	BBE-C0009	
BBE-SO-00050	BBE-IC-00002	REICHIM CRIP PROTECTION SA	Sales order	BBE-IC-00002	

- Transfer order

Save

New

Delete

Transfer order

Ship

Receive

Options

Functions

Print

View

Document notes

Transfer overview

Transfer order history

Transport order

Transport requirement

Transfer orders

Filter

Transfer nu...	Transfer status	From warehouse	To warehouse
BBE-TO-000	Created	Amsterdam	Amsterdam

1.2 Transport requirement split

Open the transport requirement by clicking on the transport requirement number in the transport requirements grid.

Navigate to the transport requirement details and click on split:

Transport requirement | BBE-SO-00088 : AGROWIN BV.

TR-00002 : BBE-SO-00088

General

REFERENCE

Transport requirement number: TR-00002

Reference: Sales order

Number: BBE-SO-00088

Lot ID: LOT002662

Transport order:

ORDER LINE

Item number: 10001-01

Product name: MILBEKNOCK IB 9.3 EC 12 x 1 L

Trademark: MILBEKNOCK

Configuration: BE

Notes for transport

MMITEST

Quantity: 10.800,00

Unit: LT

Mode of delivery: Truck

Load date

13/10/2021

Delivery date

13/10/2021

Transport pool

EU

Pick up address

Gebouw 101 Zone 5
Assesesteeweg 16
1730 Assie
Belgium

Delivery address

Haven 2
7471 LV GOOR
NLD

Volume

0,00

Net weight

10.011,60

Gross weight

10.509,60

Pallets

15

Pallet type unit

PAL

Pallets per pallet

720,00

Transport requirement details

	Pallets	Pallet type unit	Boxes	Box type unit	Total	Inventory unit	Net weight	Gross weight	Volume
✓	15	PAL	60	BOX	10800	LT	10.011,60	10.509,60	0,00

Select the desired values for each dropdown field and click on simulate, this will trigger a calculation based on the transport requirement splitting rules. If the number or pallets or weight is higher than the max truck container load, it will split the line into multiple transport requirement lines. In this example a refrigerated 20 ft container is limited to 9 standard pallets per container. Therefore, two transport requirement lines are created. Click OK to confirm and split the transport requirement.

Splitting requirement options

Split per

Container 20 ft

Refrigerated transport

Yes

Pallet type unit

PAL

Simulate

Transport requirement details

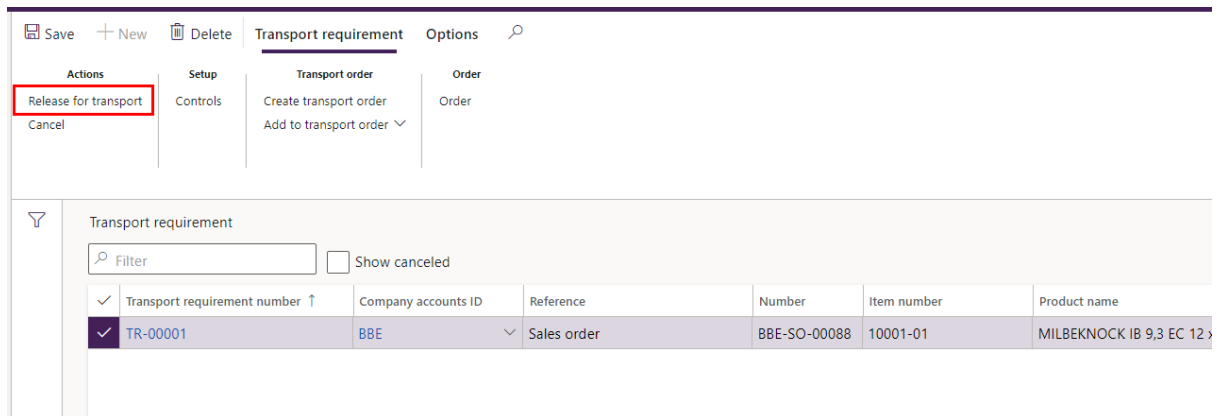
✓	Pallets	Pallet type unit	Boxes	Box type unit	Total	Inventory unit	Gross weight
	9	PAL	60	BOX	6480	LT	6.305,76
	6	PAL	60	BOX	4320	LT	4.203,84

OKCancel

Note that a refresh is necessary to see the new transport requirements in the grid.

1.3 Release transport requirement

To create a transport order the transport requirement has to be released first, this can be done by clicking on the "release for transport" button in the transport requirements form:



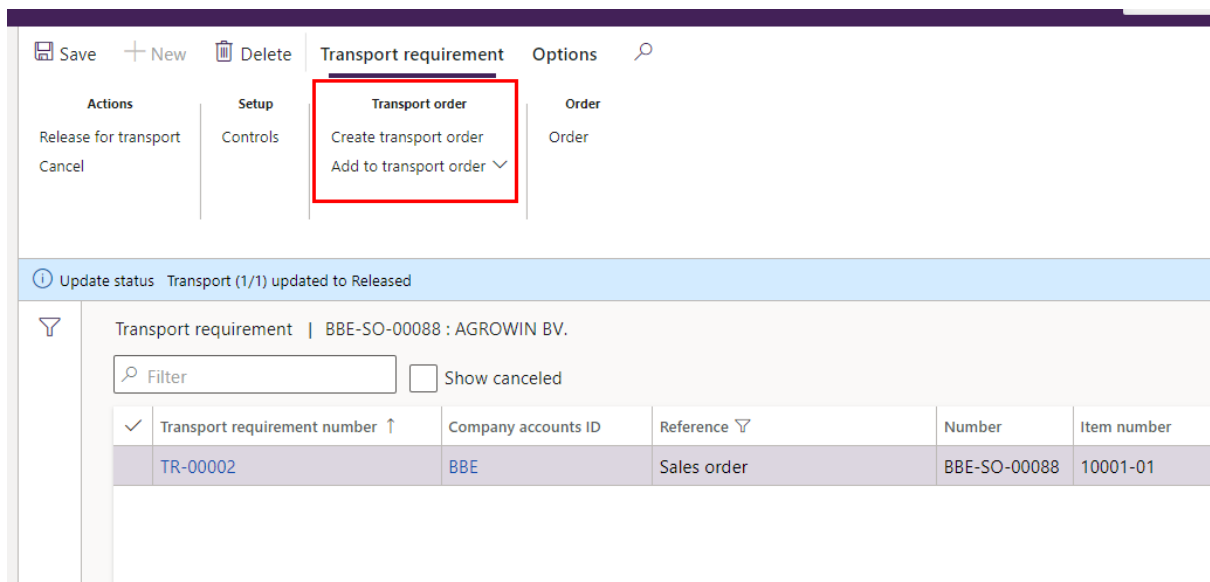
The screenshot shows the 'Transport requirement' form. At the top, there are tabs: 'Save', '+ New', 'Delete', 'Transport requirement', 'Options', and a search icon. Below these are four columns: 'Actions', 'Setup', 'Transport order', and 'Order'. In the 'Actions' column, the 'Release for transport' button is highlighted with a red box. Below the columns is a table with the following data:

Transport requirement number	Company accounts ID	Reference	Number	Item number	Product name
TR-00001	BBE	Sales order	BBE-SO-00088	10001-01	MILBEKNOCK IB 9,3 EC 12

2 Manage transport order

2.1 Transport order creation

Once the transport requirement is released, it can be added to an existing transport order, or, a new order can be created for the requirement.



The screenshot shows the 'Transport requirement' form after the requirement has been released. The 'Transport requirement' tab is selected. In the 'Transport order' column, the 'Create transport order' button is highlighted with a red box. Below the columns is a table with the following data:

Transport requirement number	Company accounts ID	Reference	Number	Item number
TR-00002	BBE	Sales order	BBE-SO-00088	10001-01

After creating the transport order, update following fields on the header:

- Invoice to company
- Transport

Transport order | TO-00001 : BBE

TO-00001 : BBE

Transport order

Transport Id TO-00001	Transporter ▼	Currency ▼	Free text
Company accounts ID BBE	Status Released	Purchase order	
Invoice to company ▼	Item number 99050		

Transport requirement

[+ Add lines](#)
[Remove](#)
[Transport requirement](#)
[Relink](#)
[Document notes](#)

✓	Company accounts ID	Reference	Number	Item number	Trademark	Configuration
	BBE	Sales order	BBE-SO-00088	10001-01	MILBEKNOCK	BE

From here two scenarios are possible.

A Scenario 1: Price request is required

In the action pane, click on request price, this will generate a new request for quotation

[Save](#)
[+ New](#)
[Delete](#)
[Transport order](#)
[Options](#)

Actions	Generate	Setup	View	Attachments	Journals
Request price Cancel	Transport order confirmation	Controls	Purchase order	Document notes	Transport order confirmations
Confirm Ready for transport	DGD document		Price request		

Transport order | TO-00001 : BBE

TO-00001 : BBE

Transport order

Transport Id TO-00001	Transporter BBE-V0193 ▼	Currency EUR ▼	Free t
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On the RFQ header, navigate to the vendor fasttab and add the transporters for which you want to request a price:

Request for quotation case | BBE-RFQCID-000001

BBE-RFQCID-000001

Buyer group	en-US	Prices include sales tax	Delivery date	
Requester	Expiration date and time	<input type="radio"/> No	13/10/2021	Document title
	13/10/2021 00:00:00	Exceptional VAT code	Mode of delivery	TO-00001
	Requesting department			

RFQ description

Bidding guidance items

Vendor

+ Add Remove Vendor search Auto-add vendors Manage reply Questions and answers

✓	Vendor account	Name	Lowest status	Highest status	Rank	Total score	Contact	Tel
✓	BBE-V0094	TRANSPORTS DANDROY NV/SA	Created	Created				✓
	BBE-V0193	HENRI ESSERS & ZONEN NV	Created	Created				

In the action pane, click send:

Save + New Delete Quotation General Options

Maintain Copy Process Replies View Charges Score Journals

Cancel Copy from **Send** Manage replies Set RFQ reply defaults Compare replies Totals Manage charges Scoring criteria Request for quotation journals

Request for quotation case | BBE-RFQCID-000001

BBE-RFQCID-000001

Request for quotation header

Click OK in the screen that pops up.

This will download an Outlook file, click to open.

BBE-RFQCID-000003 : Mattijs Minnebo

Request for quotation header

ADMINISTRATION	Document title	SALES TAX	DELIVERY	Mode of
Expiration date and time 14/10/2021 00:00:00	TO-00007	Prices include sales tax <input type="radio"/> No	Delivery date 14/10/2021	Delivery
	Allow alternates on response lines <input type="radio"/> No	Exceptional VAT code		

Request for quotation lines

+ Add line Remove Related information Set up Functions Inventory

Line type	Line number	Procurement category	Product number	Item number	Product name
Item	1		99052	99052	Transport on transfer

Price request (2).eml

Once the quotes are received prices can be updated by clicking on manage replies

Save + New Delete Quotation General Options

Maintain	Copy	Process	Replies	View	Charges	Score	
Cancel	Copy from	Send	Manage replies Set RFQ reply defaults Compare replies	Totals	Manage charges	Scoring criteria	Request

Request for quotation case | BBE-RFQCID-000001

BBE-RFQCID-000001

Select the RFQ record for the relevant vendor and click on Edit rfq reply.

Save Edit Reply General Options

Process Edit RFQ reply Edit RFQ reply Manage charges

Request for quotation

BBE-RFQ-000000002 : HENRI ESSERS & ZONEN NV

Purchase quotation header

ADMINISTRATION	Document title	Vendor account	Bid type	CONTACT INFORMATION	Email
Request for quotation case BBE-RFQCID-000001	TO-00001	BBE-V0193	Open	Contact	
	Requester	Solicitation type	Bid submitter	Telephone	

Purchase quotation lines

Mark	Line type	Line number	Procurement category	Product number	Item number	Product name	Delivery date	Expiration date and time	Status
	Item	1		99050	99050	Transport on sales		13/10/2021 00:00:00	Sent

Update the unit price and click submit. If applicable, do the same for remaining rfq's for other vendors.

Save **Submit** Decline Reset from RFQ RFQ attachments Bid attachments Options

Page options: Security diagnostics, Advanced filter or sort, Record info, Go to, Edit, Read mode, Revert, Share, Create a custom alert, Manage my alerts

Request for quotation bid | BBE-RFQ-00000002 : HENRI ESSERS & ZONEN NV

TO-00001

BBE-RFQ-0000... BBE-RFQCID-... BELCHIM CROP PROTECTION NV TECHNOLOGIELAAN 7 1840 LONDERZEEL Belgium Open EUR

Document title TO-00001 Requestor Requested delivery date 13/10/2021 Bid submitter

Status Expired Requesting department Expiration date and time 13/10/2021 00:00:00 Submission date and time

Solicitation type

RFQ description

Bidding guidance items

Amendments

Questionnaire

Delivery and payment terms

Lines

Line number	Line type	Procurement category	Product name	Product number	Item number	Quantity	Unit	Unit price	Net amount	Comment
1	Item		Transport on sales	99050	99050	1,00	LT	1.700,00	1.700,00	

Once all RFQ are submitted with the relevant prices, click on compare replies:

Save + New Delete Quotation General Options

Cancel Copy Process Replies View Charges Score Journals

Copy from Send Manage replies Set RFQ reply defaults **Compare replies** Totals Manage charges Scoring criteria Request for quotation journals

Request for quotation case | BBE-RFQCID-000001

BBE-RFQCID-000001

Request for quotation header

ADMINISTRATION Expiration date and time 13/10/2021 00:00:00 Document title TO-00001 Allow alternates on response lines No

SALES TAX Prices include sales tax No Exceptional VAT code

DELIVERY Delivery date 13/10/2021

Request for quotation lines

+ Add line - Remove Related information Set up Functions Inventory

Line type	Line number	Procurement category	Product number	Item number
Item	1		99050	99050

To accept, select the desired line and click accept:

Compare request for quotation replies BBE-RFQ-ID-000001													
Filter	Header	Line	Status	Rank	Total score	Total amount	Item number	Product name	Quantity	Unit	Unit price	Line discounts	Total disc
<input type="checkbox"/>	BBE-V0094	Header	Created			1,900.00						0.00	0.00
<input type="checkbox"/>	BBE-V0094	Line	1 Received			1,900.00	99050	Transport on sales	1.00	LT	1,900.00		
<input type="checkbox"/>	BBE-V0193	Header	Created			1,700.00						0.00	0.00
<input checked="" type="checkbox"/>	BBE-V0193	Line	1 Received			1,700.00	99050	Transport on sales	1.00	LT	1,700.00		

This action will:

- Trigger the remaining RFQ lines to be rejected
- Confirm the Transport order. Transporter and transport cost fields on the Transport order header will be filled in based on the accepted RFQ record.
- Generate a PO for the accepted vendor and amount

B Scenario 2: Price request isn't required

On the transport order header, fill in the correct transporter and the correct transport cost. Afterwards, click confirm. This will generate the purchase order creation:

Save	New	Delete	Transport order	Options
Request price	Cancel	Ready for transport	Generate	Setup
Confirm			Transport order confirmation	Controls
			DGD document	View
				Purchase order
				Price request
				Attachments
				Document notes
				Journals
				Transport order confirmations

Transport order

TO-00002 : BBE

Transport order

Transport Id

TO-00002

Company accounts ID

BBE

Invoice to company

BBE

Transporter

BBE-V0167

Status

Released

Item number

99052

Currency

EUR

Purchase order

Free text

Mode of delivery

Truck

Transport cost

1,500.00

Transport pool

EU

Load date

20/10/2021

Delivery date

20/10/2021

Pick up address

Gebouw 101 Zone 5
Assessteenweg 16
1730 Asse
Belgium

2.2 Transport order confirmation

To confirm the Transport order (and the linked purchase order) click generate transport order confirmation:

Save + New Delete Transport order Options

Actions: Request price, Confirm, Cancel, Ready for transport

Generate: **Transport order confirmation**, DGD document

Setup: Controls

View: Purchase order, Price request

Attachments: Document notes

Journals: Transport order confirmations

Transport order | TO-00001 : BBE

TO-00001 : BBE

Transport order

Transport Id: TO-00001, Transporter: BBE-V0193, Currency: EUR, Free text:

Company accounts ID: , Status: , Purchase order:

Click OK:

Confirm purchase order

Settings

Select Printer setup View charges

PARAMETERS: Quantity: Ordered quantity, Posting: Yes, Late selection: No

PRINT OPTIONS: Print: After, Print purchase order: Yes

Use print management destination: Yes, Print shelf labels: No

Print product labels: No, Use vendor print options: No

SETUP: Check credit limit: None

SUMMARY PURCHASE: Summary update for: None

Overview

+ Add Remove Sales tax

✓	Update	Purchase order	Name	Document date	Terms of payment
	Purchase order	BBE-PO-00191	HENRI ESSERS & ZONEN NV		

OK Cancel Batch

This will print the transport order confirmation document to your screen. Alternatively you can navigate to transport order confirmations:

Save + New Delete Transport order Options

Actions: Request price, Confirm, Cancel, Ready for transport

Generate: Transport order confirmation, DGD document

Setup: Controls

View: Purchase order, Price request

Attachments: Document notes

Journals: **Transport order confirmations**

Click on Original preview to generate the document:

BBE-PO-00170 - REINHAESSEN & ZOUREN NV

Purchase order confirmations

Overview Lines

Preview/Print ▾ Charges Sales tax Prepayment

Copy Original preview

Original preview

Print management preview

Use print management

Purchase journal	Date	Buyer group	Curr...	Amount in tran...	Order send status	Order request vendor s
BBE-PO-0017...	13/10/2021		EUR	2.057,00	Waiting	Waiting

2.3 Transport order ready for transport

Once the transport order is ready for transport, update the status by clicking on ready for transport:

Save + New Delete

Transport order Options

Actions

Request price Cancel

Confirm Ready for transport

Generate

Transport order confirmation

DGD document

Setup

Controls

V

Purcha

Price r

2.4 Execute transport order

To execute a transport order click go to Transport planning > transport > periodic tasks > posting product receipt. This will post the product receipt of the linked purchase orders if the transport order has status ready for transport and if the linked purchase/sales/Transfer order lines have status Received/Delivered/shipped respectively.

If desired, this process can run in batch.

Home

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Transport control

Splitting transport requirement rules

Transport order container types

Attachments

Document notes

orter

L

0193

1

0167

2

3 Dangerous Goods Declaration

Note that when dealing with a sea freight, the sea freight specific fields have to be filled in on the Transport order header:

Transport order

TO-00005 : bbe

Lines Header Released

General

GENERAL

Transport id

TO-00005

Company accounts ID

bbe

Invoice to company

Transporter

Item number

99050

Currency

Status

Released

Purchase order

Free text

Full

☒ No

SEA FREIGHT DETAILS

CTU ID number

Seal number

Container type

Tare Mass (kg)

0,00

Total gross mass (kg)

0,00

To generate the DGD document for a transport order, click on generate > DGD document:

Finance and Operations

Search for a page

Save New Delete

Transport order Options

Actions

Generate

Setup

View

Attachments

Journals

Request price

Cancel

Transport order confirmation

Controls

Purchase order

Document notes

Transport order confirmations

Confirm

Ready for transport


DGD document

Price request

Transport order

TO-00003 : BBE

IMO DANGEROUS GOODS DECLARATION

1 Shipper BELCHIM CROP PROTECTION NV Technologielaan 7 BE-1840 Londerzeel		2 Transport Document Number TO-00006	
		3 Page 1 of 1	4 Shipper's Reference
6 Consignee Via Vittorio Veneto 26857 Salerano Sul Lambro ITA		5 Freight Forwarder's Reference	
		7 Carrier (to be declared by carrier)	
8 Shipper's Declaration I hereby declare that the contents of this consignment are fully and accurately described above by the proper shipping name, and are classified, packaged marked and labelled/placarded, and are in all respects in proper condition for transport according to applicable international and national governmental regulations.			
10 Vessel / Flight Date 	11 Port/Place Of Lading	9 Additional Handling Information Emergency contact person: B.I.G. Telephone: 0032 (0)14 54 45 45 E-mail: info@big.be	
12 Port / Place of Discharge	13 Destination		
14 Shipping marks	Number and kind of packages, Description of goods	GW (kg)	Net Mass (kg)
MILBEKNOCK 10001-01	60 boxes of 12 x 1 LT on 1 pallets UN 1993 Flammable liquids, n.o.s. 3 III	701 0	667 0
			Cube (m³) 0
15 CTU ID No	16 Seal Numbers	17 CTU Size and Type	18 Tare mass (kg) 0
		19 Total Gross mass (kg) 0	
CONTAINER / VEHICLE PACKING CERTIFICATE I hereby declare that all goods have been packed / loaded into the container / vehicle identified above in accordance with the IMDG Code part 5.4.2. MUST BE COMPLETED AND SIGNED FOR ALL CONTAINER /VEHICLE LOADS BY PERSON RESPONSIBLE FOR PACKING/LOADING		21 Receiving Organization Receipt Received the above number of packages/Containers/Trailers in apparent good condition unless stated hereon; RECEIVING ORGANIZATION REMARKS:	
20 Name Of Company	Hauler's Name	22 Name Of Company Preparing Note BELCHIM CROP PROTECTION NV	
Name/Status Of Declarant	Vehicle Registration No	Name/Status Of Declarant Mattijs Minnebo	
Place and Date	Driver Name and Date	Place and Date LONDERZEEL 14/10/2021	
Signature of Declarant	Driver's Signature	Signature of Declarant	