Process:	Manage Transfers

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Author	Jurgen Trogh	D365 Key User	28/06/2021
Reviewer (s)	Jolien Sleeckx	D365 Key User	3/08/2021
Approver (s)	Kurt Braspenninckx Marc Vandenhove	Supply Planning Team lead Supply Chain Manager	Click or tap to enter a date.

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Definitions & Abbreviations

SKU: Stock Keeping Unit.
F.e.: For Example.
TO: Transfer Order.
WH: Warehouse.

Process Scope

This procedure describes the process of a transfer within the same legal entity. The stock will not be sold to another legal entity. Nevertheless, the stock can be shipped to another country. F.e.: A stock transfer from a Belgian WH to a French WH, remains Belgian property (so the ownership remains in the Belgian entity).

For transfers from one legal entity to another legal entity, please view the Manage IC Transfer process.

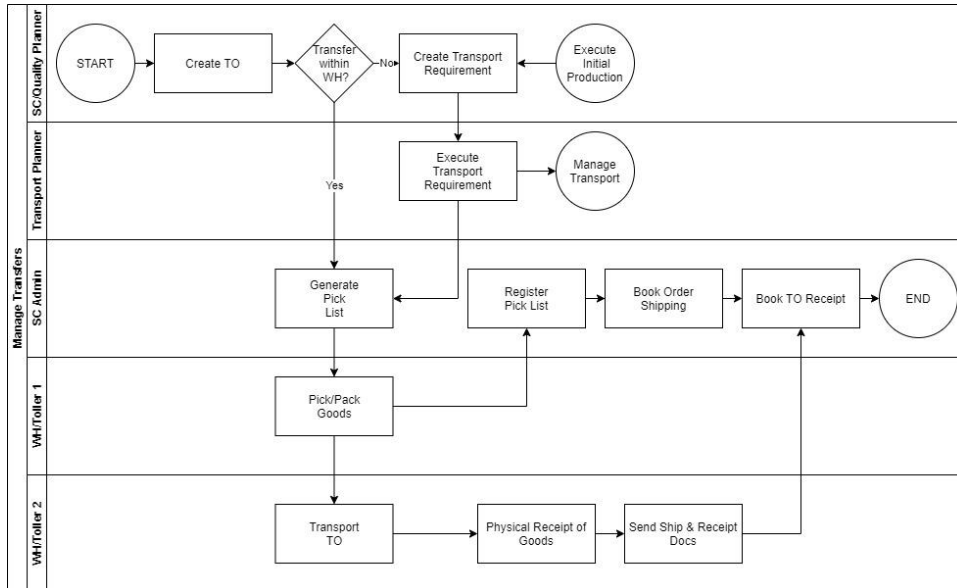The process starts when the Supply or Quality Planner (Quality Dept.) creates a transfer order in D365.

In this order he/she will indicate the product and quantity that needs to be shipped. The planner specifies the shipping location (where the stock is currently stored) and the receiving location (where the stock needs to be shipped to). To transfer these products, a transport requirement in D365 will be requested by the supply planner and the transport planner receives this request to plan the transport. For a transfer to another location within the same WH there is no transport requirement needed in D365. (F.e. when the stock needs to be transferred to the quality location in the same WH.) The Supply or Quality Planner will initiate the transport requirement and the Transport Planner will execute it in D365.

D365 will generate a picking list and forward this list to the WH. The SC Assistant will enter the picked batch numbers in the TO. When the stock is shipped from the shipping WH, the stock will be temporarily received in the transit location of the shipping WH in D365.

When the stock arrives in the receiving WH, the WH personnel will receive the stock in their application.

Process Visualizations

Manage Transfers

Process Steps

Step 1: Creation of a Transfer Order

The (Supply Chain or Quality) planner will create a TO to move the goods from location A to location B. The goods remain the property of the same legal entity.

The planner indicates the items and the quantities that need to be transferred.

2 Types of transfers can be distinguished:

- A transfer from location A to location B, where location A is located in WH X and location B is located in WH Y:
    - There is a physical movement from WH A to WH B.
- A transfer from location A to location B, where location A and location B are in the same WH X.
    - Movement between 2 sublocations in the same WH. (F.e.: A quality location).
    - No physical movement between 2 WHs is required.

Link to work instruction "WI Step 1"

Step 2: Creation of a Transport Requirement

If the goods need to be moved from one WH to another WH, the planner needs to create a transport requirement.

The transport requirement will contain all necessary information from the TO:

- Shipping WH: Loading address.
- Receiving WH: Delivery address.
- Items.
- Quantity.

The transport planner will process this transport requirement and execute the transport from one WH to another WH.

See Manage Transport process.

Link to work instruction "WI Step 2"

Step 3: Picking of Transfer

If this TO does not need a physical movement from one WH to another WH (a transfer from location A to location B, where location A and location B are in the same WH X), no transport requirement needs to be made. The SC assistant will generate a picking list that can be send to the WH by D365 to request the transfer of the goods from one location to another.

When the WH executes the picking and sends the SC admin a packing list with correct batch numbers and quantities that are picked, the SC admin can register the packing list in D365.

Link to work instruction "WI Step 3”

Step 4: Shipping of Transfer

This process step describes the movement from the shipping location to the receiving location. The goods will physically move from one location to another location:

- from location A to location B in the same WH X,
- from location A in WH X to location B in WH Y.

When the goods are shipped, the SC admin books the shipment from the shipping location. The stock will transfer from the shipping location and will be received temporarily in the transfer location of the shipping location.

Link to work instruction "WI Step 4”

Step 5: Receipt of Transfer Order

For TO's that involve a movement from location A to location B in the same WH X, the receipt in the receiving location can be booked immediately. The stock quantity is distracted from the stock in the shipping location and will be booked on the receiving location, with just a short automatic stop on the transfer location.

For transfer orders that involve a physical movement from one location A in WH X to another location B in WH Y, the receipt in the receiving WH will be booked when the goods are received physically.

The receiving WH need to send the delivery documents to the SC admin to confirm receipt of the goods.

After the booking of the receipt, the stock will transfer from the shipping location towards the receiving location.

Link to work instruction "WI Step 5"

Process Responsibilities

RACI-model:
R = Responsible – responsible for execution of the steps (can be distinct functions/persons)
A = Accountable – accountable for result of the step (only 1 person)
C = consultable – needs to be consulted for the decisions/actions – 2-way communication
I = Informed – need to be informed about result – 1 way communication

	Supply Chain or Quality Planner	SC Assistant	Transport Planner	Supply chain Manager
1) Creation of Transfer Order	R	I		A
2) Creation of Transport Requirement	R		I	A
3) Picking of Transfer Order	I	R		A
4) Shipping of Transfer Order	I	R		A
5) Receipt of Transfer Order	C	R		A

Exceptions

Transfers without a physical move do not need a transport requirement.

Locally managed transfers are not mentioned in this process yet. In later waves, the final process flow will be documented.

Control points

The products will only be booked in the system with their batch & production date. The receiving warehouse needs to confirm the physical quantity received, to align the physical quantity with their WMS and Belchim's D365. The shipped quantity from the shipping WH needs to be the same as the received quantity in the receiving WH.