CREATE AND MANAGE A TRANSFER ORDER

## Introduction

This Standard Operating Procedure (SOP) has been developed to provide you with an understanding of how to send or receive a transfer order in the NAXT system.

This procedure is linked to the following business processes:

* PRT 2.2.2

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## Prerequisite

None

## Terminology and Icons

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|  | Important / Note |
|  | Business rule |
| Direct Ship Transfer | Post directly to the customer (not via branch) |
| Default | Post to the branch to prepare for customer pick up/delivery |

## Steps

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| CREATE TRANSFER ORDER FROM WITHIN SALES ORDER | |
|  | Go to *PRT\_3.4(SOP)Source Parts through Backorder* and complete section: *Place Backorder From Another Warehouse* |
|  | Go to Step 10 to send the transfer order |

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| CREATE AND SEND A MANUAL TRANSFER ORDER | |
|  | Before creating the transfer, check stock availability   * GGNZ > Product information management > Common > Released products |
|  | Follow the menu path to open the Transfer orders screen:   * **GGNZ >** **Inventory and warehouse management > Periodic > Transfer orders**   C:\Users\johi\AppData\Local\Temp\SNAGHTML11ec325.PNG |
|  | *The* ***Transfer orders*** *window will display*  Click **New**  C:\Users\johi\AppData\Local\Temp\SNAGHTML11fb5cc.PNG |
|  | *A new line will display*  Complete the following fields:   * **From warehouse** * **To warehouse**   C:\Users\johi\AppData\Local\Temp\SNAGHTML122cdee.PNG |

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| CREATE A MANUAL TRANSFER ORDER FOR VEHICLE OR CONSIGNMENT STOCK | |
|  | Create a manual transfer order as per normal. At Step 6 where you select the **From warehouse** and **To warehouse**, select the vehicle or consignment stock location as required. |
|  | Click **Add** and enter **Item number** and **Transfer quantity**  C:\Users\johi\AppData\Local\Temp\SNAGHTML1255a36.PNG |

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|  | Click the **Delivery** tab and complete the following fields:   * **Ship instructions –** only update if required. ‘Default’ means this will be sent to the receiving branches delivery address * **Mode of delivery –** Courier company etc * **Delivery terms –** for transfers from Auckland (FMS)   C:\Users\johi\AppData\Local\Temp\SNAGHTML1292afc.PNG | |
|  | Go to Step 12 to send the transfer order | |
|  | | **For Transport only**  Add in the freight cost on the General Tab.   * This will be journaled to the appropriate branch at month end   Note this is not required for those warehouses using FMS for which there is a separate report available | |
|  | | Click **Picking journal**  C:\Users\johi\AppData\Local\Temp\SNAGHTML130bdf7.PNG | |
|  | | *A notification window will display advising that a* ***Picking journal*** *has been created.*  You will only have access to this picking journal if you have access to the sending warehouse. The TO number and PJ number should be recorded for your own reference. | |

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| PICK AND SHIP A TRANSFER ORDER | |
|  | If you have created the PJ and have rights to process the PJ, click on the “Picking journal created” line and the **Show** button will appear  Click **Show**  If you close the notification window you can access the Picking journal by clicking on **Picking journal** within the **Transfer orders** window |
|  | Alternatively, the shipping warehouse will process PJs through the list on screen. |
|  | *The* ***Picking journal*** *window will display*  Click **Picking list pro voucher**  C:\Users\johi\AppData\Local\Temp\SNAGHTML13d2966.PNG |
|  | ***Picking******journal*** *prints (to screen or printer)*  C:\Users\johi\AppData\Local\Temp\SNAGHTML140e046.PNG |
|  | Click **Close** |
|  | *The* ***Picking journal*** *window will be displayed*  Click **Pick**  C:\Users\johi\AppData\Local\Temp\SNAGHTML135a7c9.PNG |

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|  | *The* ***Pick*** *window will display*  Click **Pick all** to pick all in the **Pickable** field or enter the amount to pick in the **Pick now** field for each line  C:\Users\johi\AppData\Local\Temp\SNAGHTML1370d9d.PNG |
|  | *The* ***Pick now*** *field will be updated*  Click **Apply**  C:\Users\johi\AppData\Local\Temp\SNAGHTML139a910.PNG |

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|  | *The* ***Picked quantity*** *field will be updated*  Click **Close**  C:\Users\johi\AppData\Local\Temp\SNAGHTML13abb1a.PNG | |
|  | | *The* ***Picking journal*** *window will display*  Click **Picked**  C:\Users\johi\AppData\Local\Temp\SNAGHTML1425bac.PNG |
|  | | ***Change of status*** *window opens*  Click **OK** |
|  | | *If the transfer is not related to a sales order then a pop up will display asking if you want to print the transfer order shipment*  In all instances click **No** |
|  | | *If the transfer order is linked to a sales order a message will display asking if you want to print a pro-forma packing slip*  If you would like to print a pro-forma packing slip, click **Yes** |
|  | | *The* ***Packing Slip*** *document will display*  Print if required or click **Close** | |
|  | | If the transfer order is not linked to a sales order you need to print a Stock Transfer Order from the Overview Screen. Highlight the transfer order and click **Print > Transfer overview**  Stock Transfer Orders need to be printed and included with the items being shipped so that the receiving branch can identify the transfer order related to the items in the shipment. It also includes the receiving branches address which you will need for shipping (unless using FMS)  C:\Users\johi\AppData\Local\Temp\SNAGHTMLc12639.PNG | |

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|  | *A notification will display advising that the Receipt journal has been created*  Click **Close** |
|  | *The* ***Picking journal*** *window will display*  Click **Close** |
|  | *The* ***Transfer journal*** *window will display. The Transfer journal will have a new* ***Transfer status*** *of ‘Shipped’ once refreshed (F5).*  C:\Users\johi\AppData\Local\Temp\SNAGHTML176911f.PNG |

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| RECEIVE A TRANSFER ORDER | |
|  | Follow the menu path to open the Transfer orders screen:   * **GGNZ >** **Inventory and warehouse management > Periodic > Transfer orders**   C:\Users\johi\AppData\Local\Temp\SNAGHTML11ec325.PNG |
|  | *The* ***Transfer orders*** *window will display*  Highlight the transfer order and click on **Arrival journal**  C:\Users\johi\AppData\Local\Temp\SNAGHTML1478ebd.PNG |
|  | *The* ***Arrival journal*** *window will display*  Click **Print receipt list if required**  C:\Users\johi\AppData\Local\Temp\SNAGHTMLf88c2d.PNG |
|  | *The* ***Receipt journal*** *window will display*  Ensure the **Display quantity** checkbox is ticked and click **OK** |
|  | *The* ***Warehouse Receipt*** *will display*  Print if required then click **Close**  C:\Users\johi\AppData\Local\Temp\SNAGHTMLfa83e3.PNG |
|  | *The* ***Arrival journal*** *window will display*  Click **Print Put Away**  C:\Users\johi\AppData\Local\Temp\SNAGHTML10fe8fc.PNG |
|  | ***Put Away window*** *opens*  Click **OK** |
|  | *The* ***Warehouse Put Away*** *document will display*  Print if required then click **Close**  C:\Users\johi\AppData\Local\Temp\SNAGHTML5db6150.PNG |

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|  | *The* ***Arrival journal*** *window will display*  Click **To be received**  C:\Users\johi\AppData\Local\Temp\SNAGHTML14cfe32.PNG |

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|  | ***Change of status*** *window opens*  Click **OK** | |
|  | *The* ***Arrival journal*** *window will display*  Click **Registration**  C:\Users\johi\AppData\Local\Temp\SNAGHTML14e716e.PNG | |
|  | *The* ***Receiving*** *window will display*  Check **Remaining** quantity of items  Click **Register all** or type the quantity in Register now  Change the location if necessary  C:\Users\johi\AppData\Local\Temp\SNAGHTML15129f3.PNG | |
|  | *The* ***Register now*** *field will be updated*  Click **Apply**  C:\Users\johi\AppData\Local\Temp\SNAGHTML15572c5.PNG | |
|  | *If location is changed, the* ***Change location*** *window will display*  Select the following as required:   * **Yes** – to point all picking and put away activities to that new location for selected line * **Yes to all** – to point all picking and put away activities to that new location for all lines * **No** – to keep current location for all picking and put away activities for that line     If you have changed the location for an overflow bin, click **No** (distribution warehouses)    If you select **Yes** or **Yes to All,** all future activity should be from the new location unless some stock still remains in another location. It is best practice to ensure all stock is in one location. | |
|  | Click **Close** | |
|  | *The* ***Change of status*** *window will display*  Click **OK** |
|  | *The* ***Arrival journal*** *window will display*  Click **Closing** in the **Status** section  C:\Users\johi\AppData\Local\Temp\SNAGHTML15f122f.PNG |
|  | Click **OK** |
|  | *The* ***Arrival journal*** *window will display*  Click **Post transfer receipt** in the **Posting** section  **This must be done at this point in the process** otherwise the receipting process will not be complete. Stock will be available for sales but the transfer will remain at shipped status.  C:\Users\johi\AppData\Local\Temp\SNAGHTML1628118.PNG |

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|  | *The* ***Receive*** *window will display*  Select ‘Registered’ in the **Update** field, tick the **Edit lines** checkbox and click **OK** |
|  | *The* ***Arrival journal*** *window will display*  Click **Close** |
|  | *The* ***Transfer orders*** *window will display*  Click **F5** to refresh - the status will be updated to **Received**  C:\Users\johi\AppData\Local\Temp\SNAGHTML16735f5.PNG |