CHAPTER 55 - TRANSFER ORDERS & RETURN TO VENDOR...2

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Transfer Orders

The inventory to be transferred is selected by LP id at the sending facility.
At the receiving facility, the operator only needs to scan the LP label for receiving.
The LP id remains the same and there is visibility of the inventory in all stages of the transfer.

Aggregate Inventory Customer inventory can be transferred. Please see the User Manual Chapter in AI for details.

Following are instructions on how to transfer orders from one facility to another.

Initial Set up

Setting up the "to facility" as a consignee

Link the "to facility" consignee record to the customer record by adding the "to facility" as a consignee. The consignee ID does not need to be the same as the facility ID but you may want to keep it consistent.

Consignee Maintenance A - FACILITY A -- Transfer Orders

| Name | Carriers | Comments |

Consignee ID:
A

Status:
A Active

Name:
FACILITY A -- Transfer Orders

Contact:

Address:
512 Main Street

City:
Park Ridge

State/Province:
IL

Postal Code:
60068

Country:
USA USA

☐ Bill For Pallets

Master Account:

Phone:

Fax:

E-Mail:

☑ Freight Billing Location
☑ Shipping Location
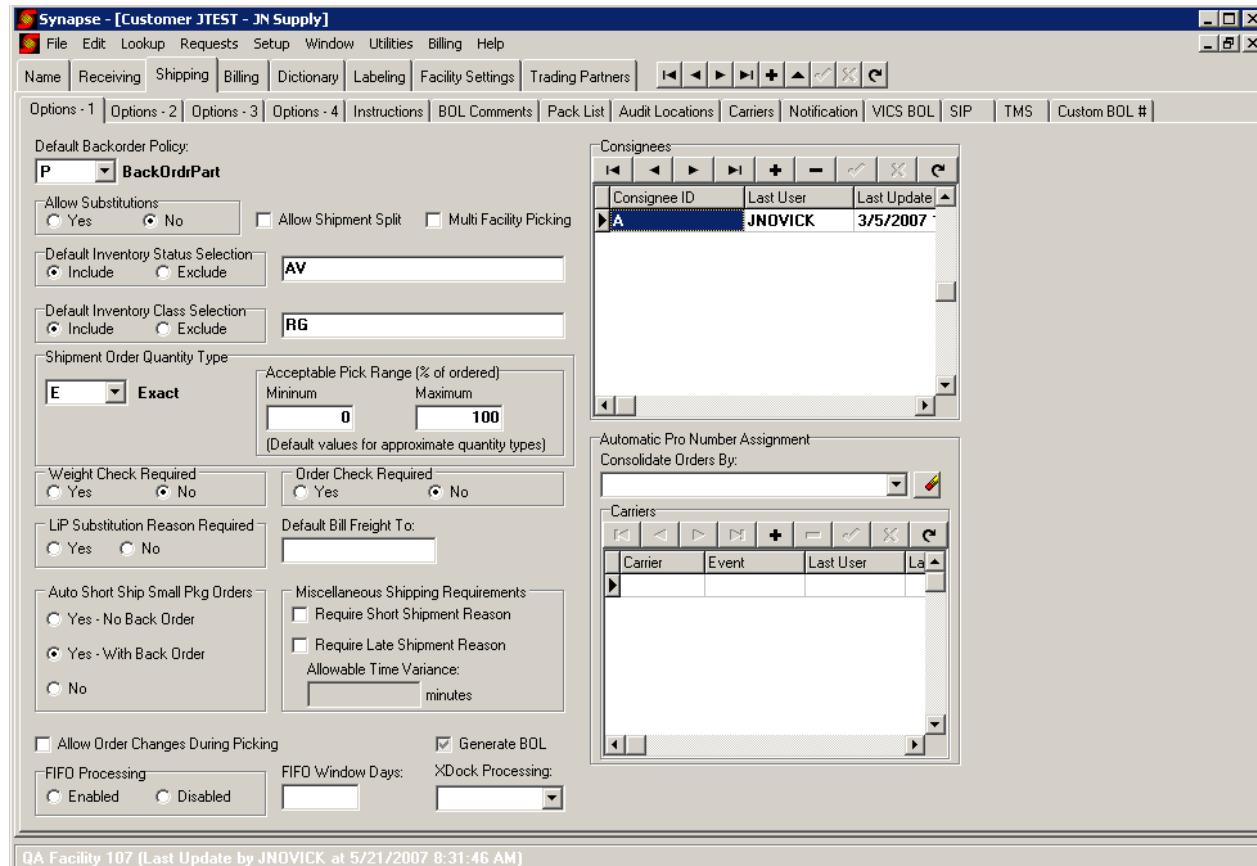☐ Transportation Appointment Required

Default Bill Freight To:

Default Shipment Type:

Default Shipment Terms:

Smoke Facility 107 (Last Update by SWINCHELL at 1/24/03 10:24:00 AM)

Each operator in the "from" and "to" facilities needs security authorization for the facility, customer and activity which is accomplished by selecting Setup/Security Authorization from the main menu.

Adding the Transfer Order

Add the order with the following data

- Select T – Transfer as the order type.

- Select the To Facility from the drop down box.

On the Shipping tab:

Enter the Consignee ID for the "to facility" and all other appropriate information.

Close out of the screen when the order detail screen is displayed. **<u>Do not add</u>** order item detail lines.

Note: The order will be on Hold. Do not remove the order from Hold.

Identifying and Preparing the Inventory to be Transferred

Transfers are processed at the License Plate level. The specific License Plates must be identified and prepared.
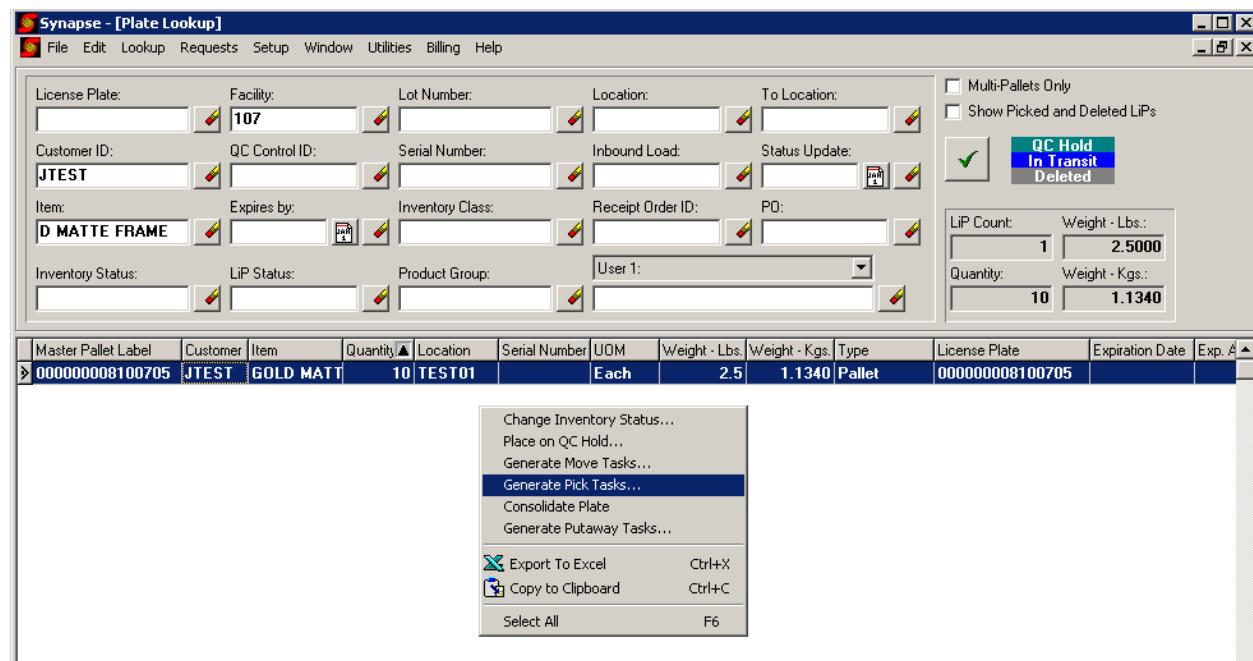
If any inventory to be transferred is mixed in a LP with other inventory that is not to be transferred, prepare the transfer LP using the Split LP function.

If inventory is in a pickfront and is not associated with a discrete LP, move the inventory to a LP.

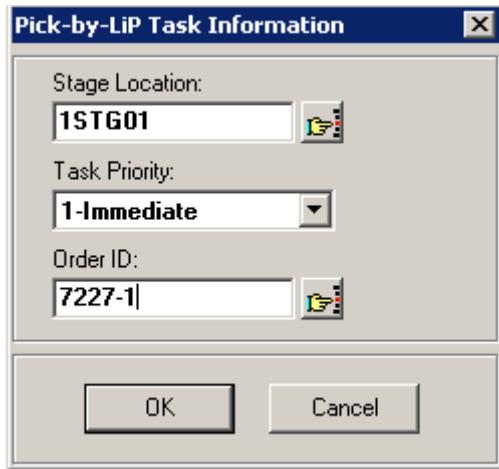### Selecting License Plates to be Transferred

Go to the Plate Lookup screen and enter the selection criteria.

Select the LP or LP's and right click to get the alternate menu and select Generate Pick Tasks.
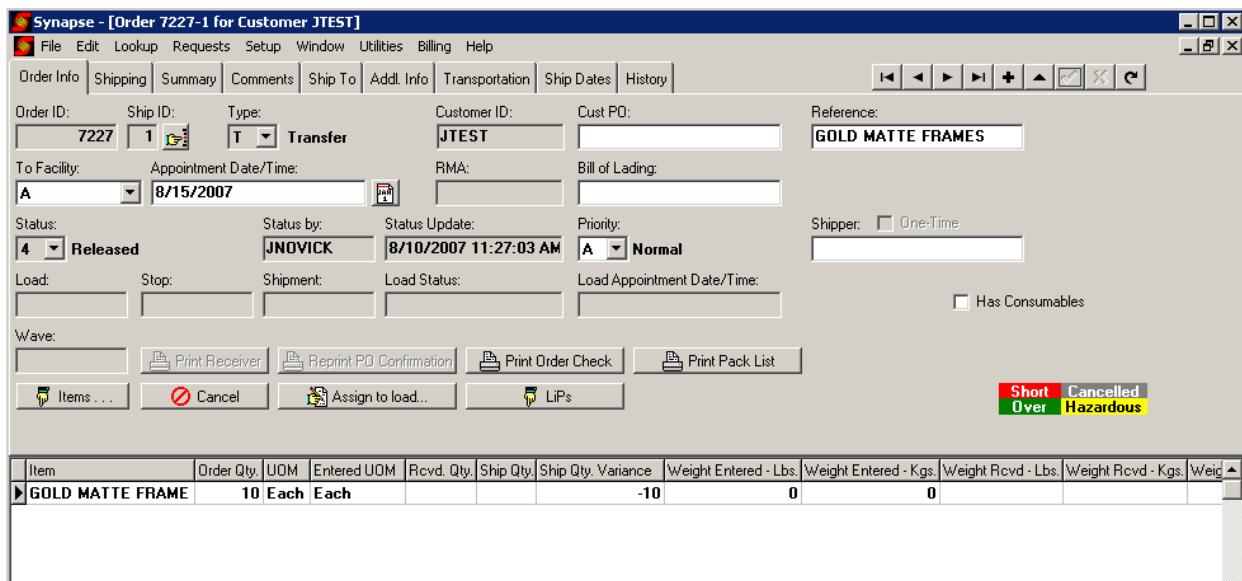

On the pop-up menu enter the Staging Location and the order/shipid of the transfer order (i.e. 12345-1). Note if you use the order lookup option on this menu, make sure the order type is "T" (Transfer).

Note: **Line Pick Tasks will be automatically generated in an "On Hold" priority. Order Item Detail lines will be added to the Transfer Order. The status of the transfer order will be removed from Hold and changed to Released.**

Assign a load. When assigning the load, the load type should default to OUTT (Outbound Transfer Load). Do not mix other types of orders in the load. Arrive the load at the appropriate time. Do not unarrive and rearrive the load.

Note: **Do not assign the order to a Wave as the pick tasks are already generated.**

Picking and Shipping the order in the "from facility".

- Remove the pick tasks from "On Hold" Priority.

- **Execute all the pick tasks. Do not make any substitutions. Do not attempt to regen the picks.**

- Stage the LP's.

- Load and ship the order.

Receiving/Processing the Transfer Order

Verify that the setup (putaway rules, etc.) are correct for the items in the "to Facility". The RF and CRT operators must be logged into the "to Facility".

Note: **The inbound load will be the same load number but the load type is now INT (Inbound Transfer Load).**

Enter the receiving facility door location and refresh the screen.

Arrive the load. Do not unarrive the load and attempt to re-arrive the load. The order status will change from "S"hipped status to "A"rrived status.

Before receiving, the LP's are In Transit status and show as the trailer for the load as the location.

The RF operator can now receive the order via 1-step receiving.

The receiving screen will display "11 Transfer Detail". Scan or enter the LP's received.
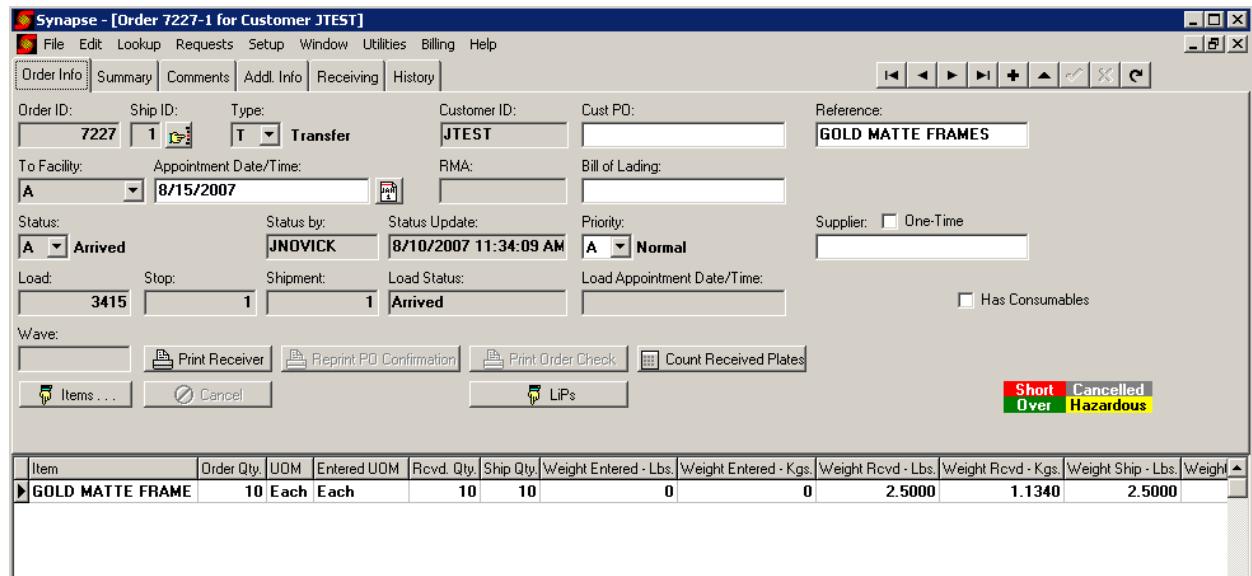
Execute the Putaway tasks or perform putaway and close the load. Once the load is closed the load and order status will be "R"eceived.

The LP history screen will reflect the movememt between the 2 facilities as the example below shows.

The Order History screen will reflect the movement between the 2 facilities as the example below shows.

Return to Vendor

The order type 'Return To Vendor' is designed for the purpose of sending product back to the manufacturer that contains damages, defects, missing parts, etc. Pallets are built up with multiple items and quantities on the same LP (single-product LP's are also available for Return To Vendor orders). These LP's are then assigned directly to the Return to Vendor order for pallet specific selection. The LP's are not available for substitution or partial picks.

Identifying and Preparing the Inventory to be Returned to Vendor

The RF Option 13 – Build Pallet is used to create a multiple item pallet which will be built for returning product to the vendor. The user will use RF Option 13 to create the pallet(s) that will be shipped to the vendor.

```
13  Build Pallet

LP ▮_____
Location

======= From =======
ID

====== Detail ======
Qty         UOM
Customer

Status      Class


Enter dest LP
```

- Scan or Enter the new LP that will be assigned to the multiple item pallet.
- Scan or Enter the Location that this pallet will reside in.
- Press Enter.

```
13  Build Pallet

LP 0630060000000100
Location 1stg01

======= From =======
ID ▮_____

====== Detail ======
Qty         UOM
Customer

Status      Class


Enter LP or PF
```

- In the From section, Scan or Enter the LP that the product is currently located on.
- Press Enter.

```
13  Build Pallet

LP 0630060000000100
Location 1stg01

======= From =======
ID 0623060000000200

====== Detail ======
Qty 900    UOM EA
Customer CW
Itm 100E
Status OH  Class RG


Enter detail
```

- In the Detail section, the current attributes of the LP will be displayed.

```
13  Build Pallet

LP 0630060000000100
Location 1stg01

======= From =======
ID 0623060000000200

====== Detail ======
Qty 400    UOM EA
Customer CW
Itm 100E
Status OH  Class RG


Enter detail
```

- Enter in the quantity (directly over the current quantity) that will be removed from the existing LP and moved to the new LP.

```
13  Build Pallet

LP 0630060000000100
Location 1stg01

======= From =======
ID █_____

====== Detail ======
Qty 400     UOM EA
Customer CW
Itm 100E
Status OH  Class RG


LP created
```

- The system will confirm that the new LP has been created.
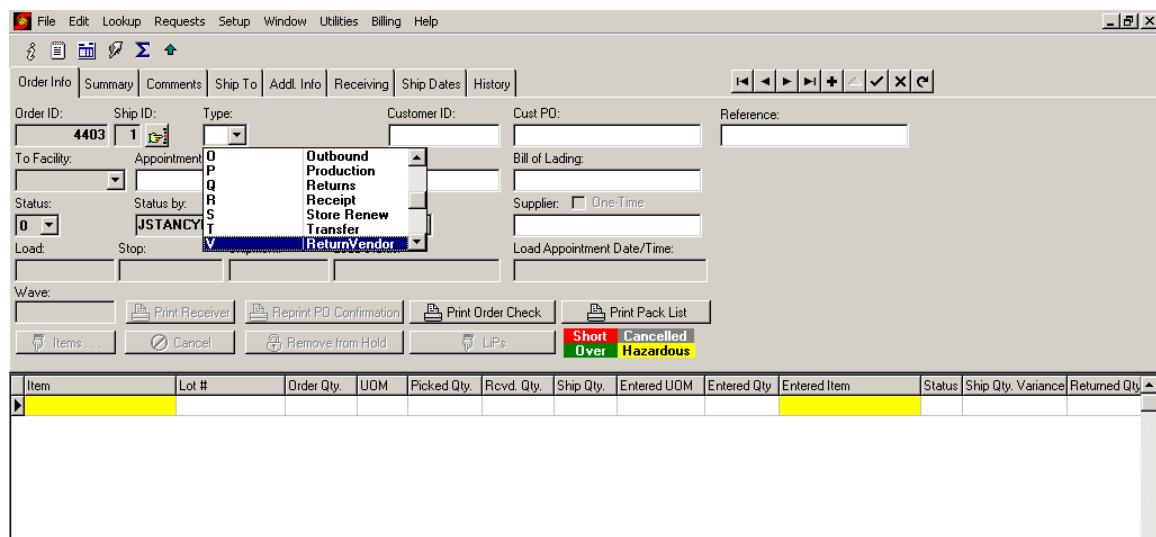
```
13  Build Pallet

LP 0630060000000100
Location 1stg01

======= From =======
ID 11170500000000100

====== Detail ======
Qty 25      UOM CS
Customer CW
Itm 100H
Status OH  Class RG
LOT 123

Mix Items?█
```

- When the next (different) item is entered/added to the new LP the system will prompt the user with the question, Mix Items?. If the user enters 'N', the system will return the prompt to edit the From LP. With this response the system assumes that the wrong From LP has been selected and needs to be changed. If the user enters 'Y', then the system will create a Mixed Pallet by adding the new item onto the New LP.
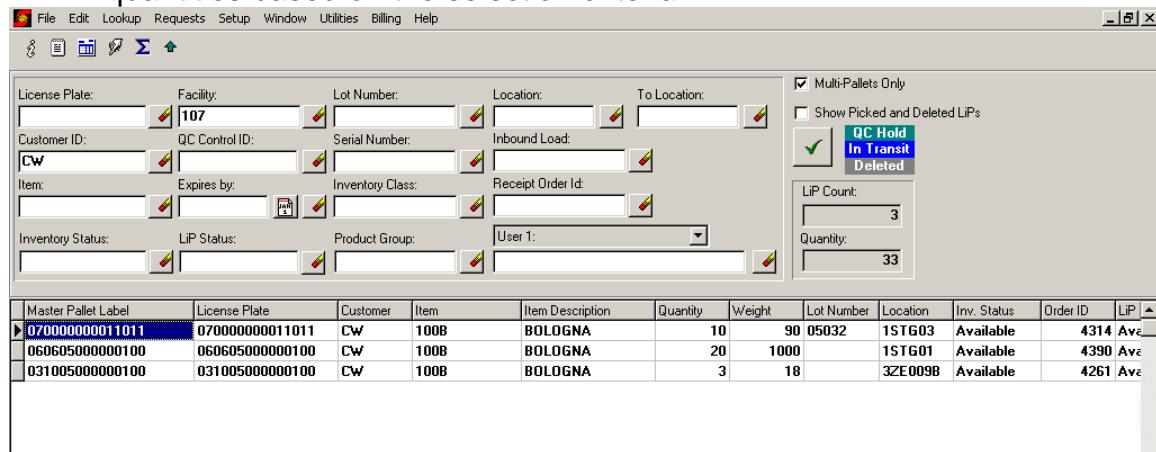
Adding the Return to Vendor Order

Add the order with the following data

- Select **V** – ReturnVendor as the order type
- Enter in all of the shipping information
- The License Plate Lookup screen will automatically display the items and quantities based on the selection criteria.

*Notice that the 'Multi-Pallets Only' button has already been selected.

- Click on the Green check to display all of the Multi-Pallets.
- Or unselect the Multi-Pallets Only box to select from other pallets in inventory.

- Do not add order detail lines.
- Right Click on the LP's that are to be assigned to the order.
- Select Generate Pick Tasks

* Note: The Lookup/License Plates screen can be accessed at any time during the order to add additional LP's except when the order is at 'Loading' status
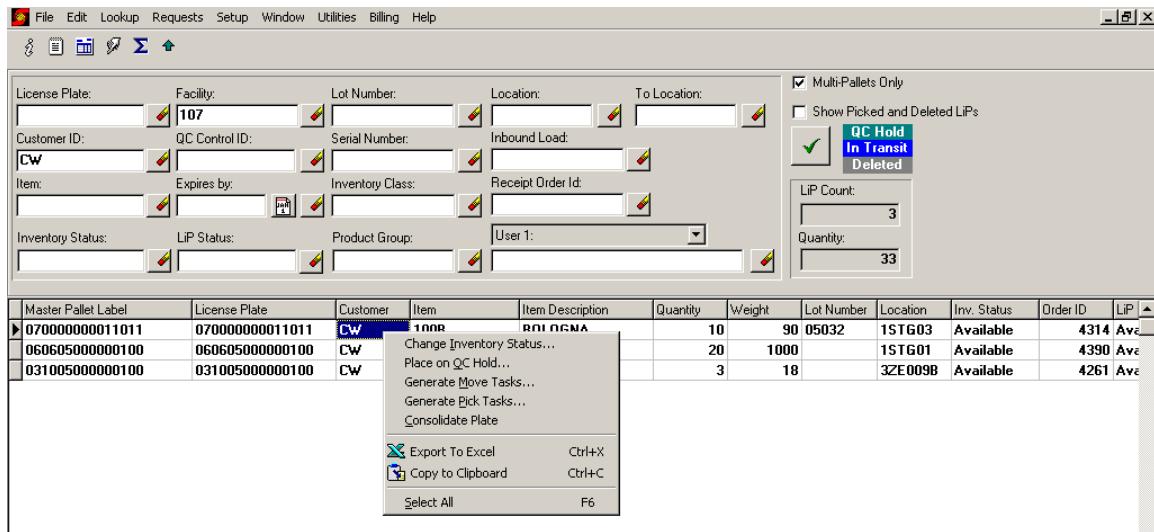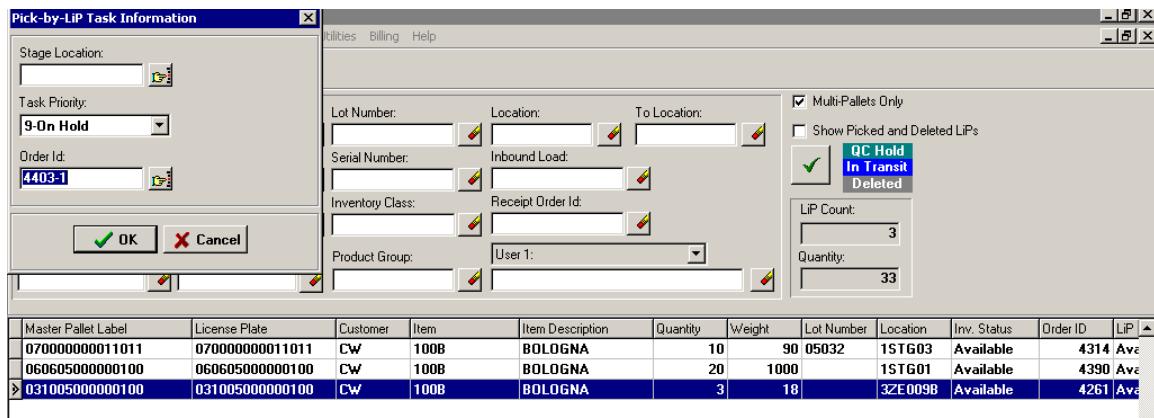

- A pop up window will display.
- Enter the Staging location for the picks (an error message will be displayed if left blank).
- Enter/change the Task Priority. *The task priority can be changed here or on the task queue. The task priority will need to be set to either, Low, Normal, Immediate or High for a user to access the task on the RF.

Tasks will now be generated for the LP. Continue this process until all LP's have been selected for the order.

The tasks will be available as Line Picks (RF Option 52) or Order Picks (RF Option 54). The RF user will be tasked one LP at a time as Full Pallet Picks.

*Remember that the LP's are not available for substitution or partial picks. Do not try to regen picks.

Security for CRT Screens

The security in 'Return to Vendor' is the same as the regular order maintenance security. No additional security is needed.