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CHAPTER 55 - TRANSFER ORDERS & RETURN TO VENDOR

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.

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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

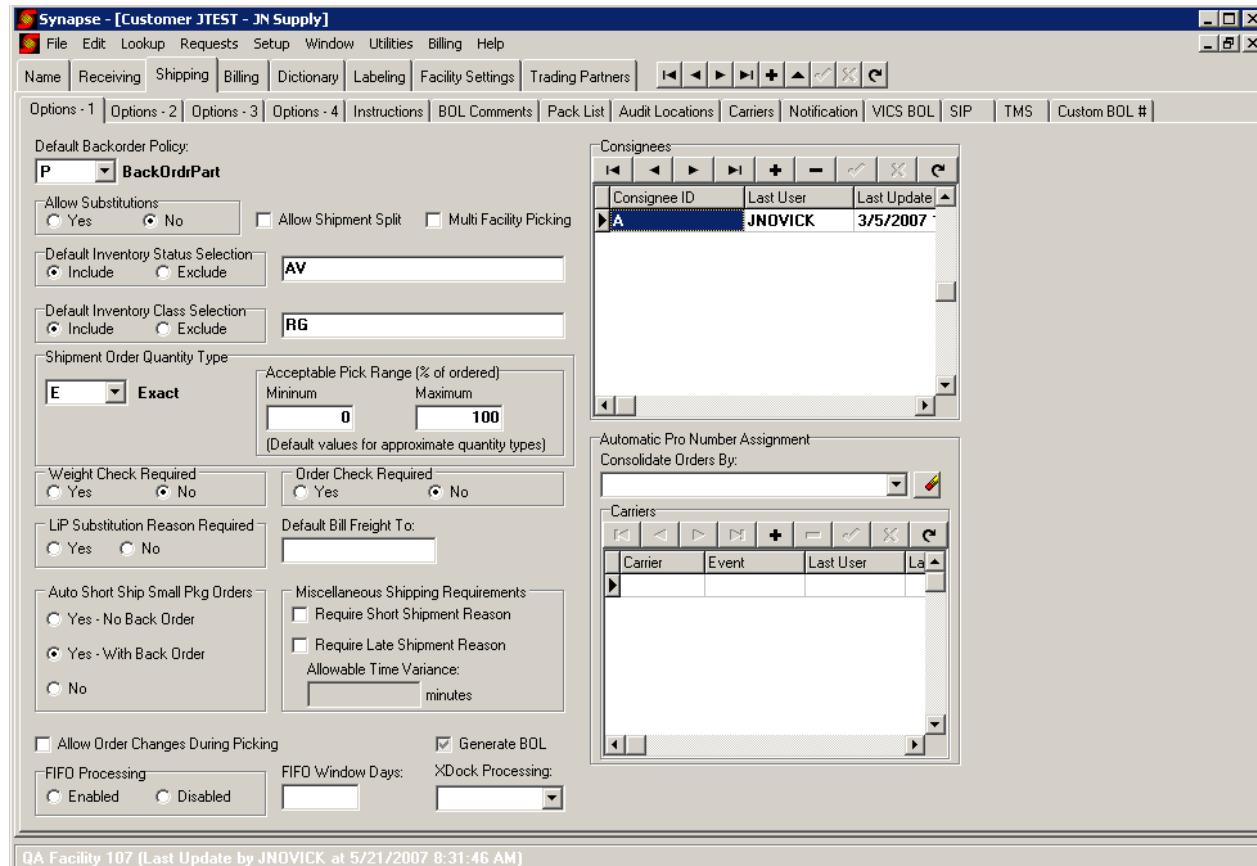
Default Bill Freight To:

Default Shipment Type:

Default Shipment Terms:

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

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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.

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Adding the Transfer Order

The screenshot shows the Synapse software interface for adding a transfer order. The main window title is "Synapse - [Order 7227-1 for Customer JTEST]". The menu bar includes File, Edit, Lookup, Requests, Setup, Window, Utilities, Billing, Help. The tabs at the top are Order Info, Shipping, Summary, Comments, Ship To, Addl. Info, Transportation, Ship Dates, and History. The Order Info tab is active, showing the following data:

Order ID:	Ship ID:	Type:	Customer ID:	Cust PO:	Reference:
7227	1	T Transfer	JTEST		GOLD MATTE FRAMES

Below this, there are fields for To Facility (A), Appointment Date/Time (8/15/2007), RMA, Bill of Lading, Status (Hold), Status by (JNOVICK), Status Update (8/10/2007 11:23:24 AM), Priority (Normal), Shippers (One-Time), Load, Stop, Shipment, Load Status, Load Appointment Date/Time, and Has Consumables. At the bottom, there are buttons for Print Receiver, Reprint PO Confirmation, Print Order Check, Print Pack List, and links for Items..., Cancel, Remove from Hold, and LiPs. A status bar at the bottom right shows Short, Cancelled, Over, and Hazardous.

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.

The screenshot shows the Synapse software interface on the Shipping tab for Order 7227-1. The top part of the screen shows the same header and tabs as the previous screenshot. The Shipping tab is active, displaying the following data:

Ship To:	FACILITY A -- Transfer Orders 512 Main Street Park Ridge, IL 60068	Shipment Type:	Pro Number:	xDock Processing:
		L LTL		S

Below this, there are fields for Shipment Terms (PPD Prepaid), Component Template, Shipping Cost, One-Time checkbox, Bill Freight To, One-Time checkbox, Carrier (ACXS ACTION EXPRESS Mini Me), Delivery Service, Saturday Delivery Okay checkbox, Stage Location, TMS Release Identifier, and FTZ 216 Authorization. At the bottom, there is a table with columns: Item, Order Qty., UOM, Entered UOM, Rcvd. Qty., Ship Qty., Ship Qty. Variance, Weight Entered - Lbs, Weight Entered - Kgs, Weight Rcvd - Lbs, Weight Rcvd - Kgs, and Weight. A yellow row is highlighted in the table.

Close out of the screen when the order detail screen is displayed. Do not add order item detail lines.

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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.

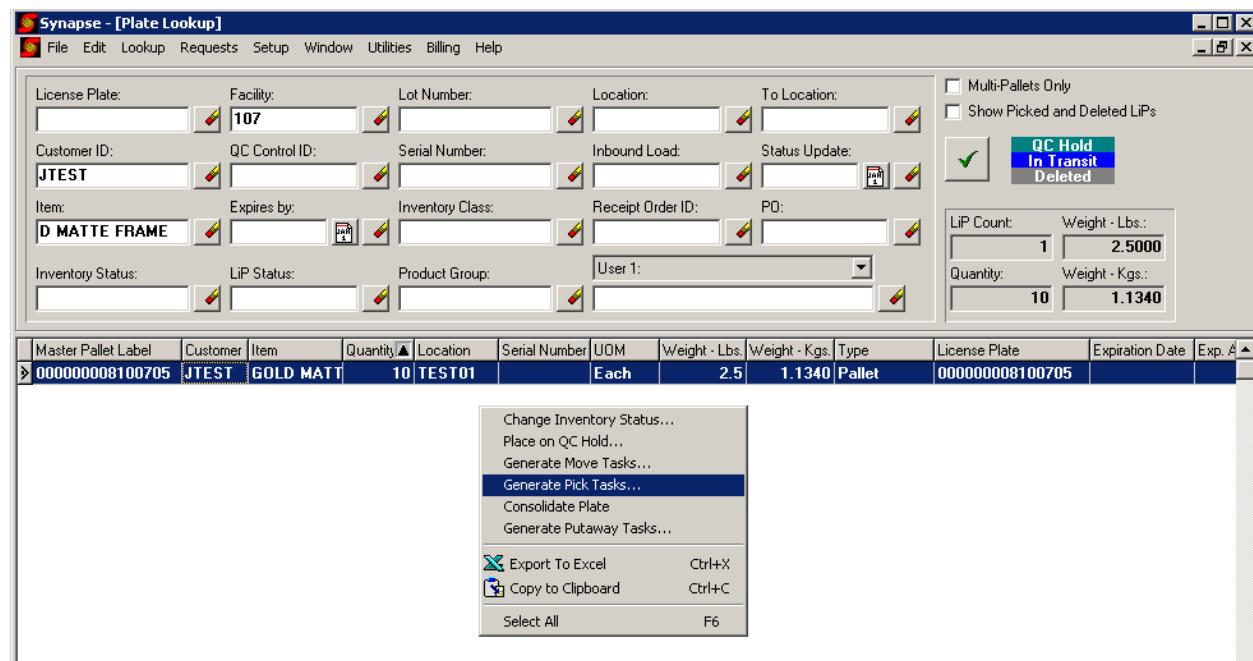
If any inventory to be transferred is mixed in a LP with other inventory that is not to be transferred, prepare the transfer LP using the Split LP function.

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

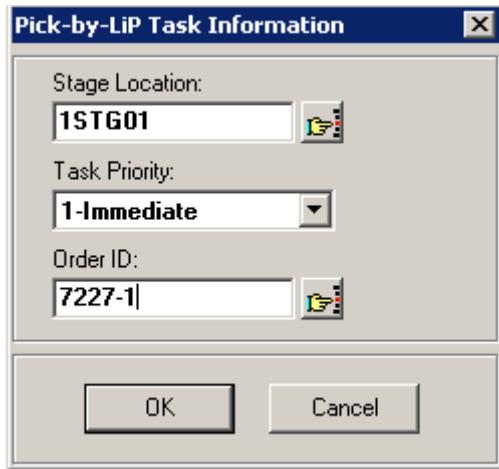
Go to the Plate Lookup screen and enter the selection criteria.

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

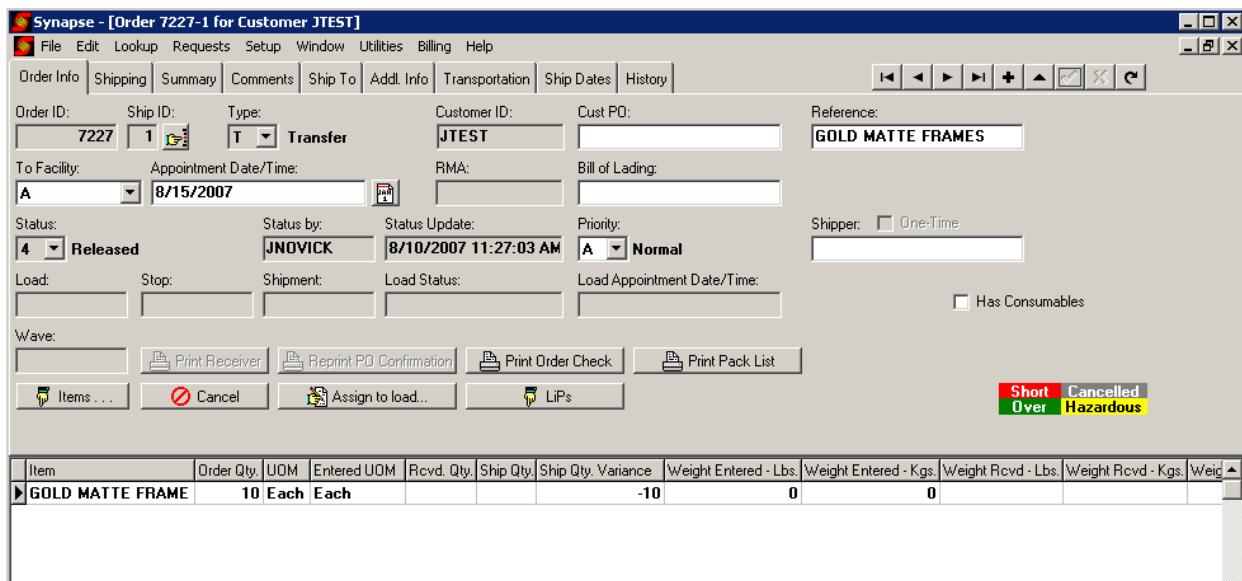


On the pop-up menu enter the Staging Location and the order/shipid of the transfer order (i.e. 12345-1). Note if you use the order lookup option on this menu, make sure the order type is "T" (Transfer).

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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.

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The screenshot shows the Synapse software interface for managing loads. At the top, the title bar reads "Synapse - [Load 3415]" and the menu includes File, Edit, Lookup, Requests, Setup, Window, Utilities, Billing, Help. Below the menu is a toolbar with buttons for Load Info, Comments, Summary, Pallet Tracking, Pro Numbers, Addl Info, Load Tracking, and various navigation and search icons. The main area displays load details: Load: 3415, Carrier: ACXS, Trailer: 081007, Stage Location: (empty), Appointment Date/Time: (empty). Type: OUTT, Bill of Lading: OutTransfer, Seal: (empty), Door Location: DOOR016, Shipment Type: (empty), Late Shipment Reason: (empty). Status: 4, Status by: JNOVICK, Status Update: 8/10/2007 11:27:49, Pro Number: (empty), Shipment Terms: (empty). Buttons at the bottom include Stop... (blue), Close (grey), Undo Arrive (yellow), LiPs (green), Cancelled (grey), Variance (blue), Hazardous (red), and HOT (red). A large grey area below the status bar is labeled "Cancelled Variance HOT". At the bottom, there are two tabs: Orders and Stops. The Stops tab is selected, showing a grid of stops:

Stop	Ship	Stop Status	Order ID	Order Status	Customer ID	Order Qty.	Rcvd. Qty.	Ship Qty.	Weight Entered - Lbs	Weight Entered - Kgs	Weight Ship - Lbs	Weight Ship - Kgs	Weight Re
1	1	Planned	7227	Released	JTEST	10	0	0	0	0	0	0	0

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.

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The screenshot shows the Synapse software interface for managing transfer orders. The main window title is "Synapse - [Load 3415]". The menu bar includes File, Edit, Lookup, Requests, Setup, Window, Utilities, Billing, Help. The toolbar contains standard icons for file operations like Open, Save, Print, and Exit. Below the toolbar are tabs for Load Info, Comments, Summary, Pallet Tracking, Pro Numbers, Addl Info, and Load Tracking. The main data entry area shows the following details:

Load:	3415	Carrier:	ACXS	Trailer:	081007	Stage Location:	Appointment Date/Time:
Type:	INT	InTransfer	Bill of Lading:	Seal:	Door Location:	Shipment Type:	Late Shipment Reason:
Status:	9	Shipped	JNOVICK	Status by:	Status Update:	Pro Number:	Shipment Terms:
				8/10/2007 11:30:19			

Buttons at the bottom include "Stops...", "Close", "Arrive", "LiPs", and status indicators for Cancelled (blue), Variance (yellow), Hazardous (red), and HOT (orange). A message bar at the bottom right says "Cancelled Hazardous HOT".

Below the main window, there is a smaller window titled "Orders" showing a single row of data:

Stop	Ship	Stop Status	Order ID	Order Status	Customer ID	Order Qty.	Rcvd. Qty.	Ship Qty.	Weight Entered - Lbs.	Weight Entered - Kgs.	Weight Ship - Lbs.	Weight Ship - Kgs.	Weight Re
►	1	1	Shipped	7227	JTEST	10	0	10	0	0	2.5	1.13399256	

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).

This screenshot is identical to the one above, showing the Synapse software interface for managing transfer orders. The main window title is "Synapse - [Load 3415]". The menu bar, toolbar, and tabs are the same. The data entry area shows the same details as the previous screenshot. The "Arrive" button is highlighted with a yellow background and a black border, indicating it is the active or next step in the process. The message bar at the bottom right still says "Cancelled Hazardous HOT".

Below the main window, there is a smaller window titled "Orders" showing a single row of data:

Stop	Ship	Stop Status	Order ID	Order Status	Customer ID	Order Qty.	Rcvd. Qty.	Ship Qty.	Weight Entered - Lbs.	Weight Entered - Kgs.	Weight Ship - Lbs.	Weight Ship - Kgs.	Weight Re
►	1	1	Shipped	7227	JTEST	10	0	10	0	0	2.5	1.13399256	

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.

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Synapse - [Load 3415]

File Edit Lookup Requests Setup Window Utilities Billing Help

Load Info Comments Summary Pallet Tracking Pro Numbers Addl Info Load Tracking Back Next + Up Down Cancel Load

Load: 3415 Carrier: ACXS Trailer: 081007 Stage Location: Appointment Date/Time:

Type: INT InTransfer Bill of Lading: Seal: Door Location: Shipment Type: Late Shipment Reason:

Status: A Arrived Status by: JNOVICK Status Update: 8/10/2007 11:34:09 Pro Number: Shipment Terms:

Orders	Stops	Print All Receivers		Count Received Plates												
		Stop	Ship	Stop Status	Order ID	Order Stat	Customer ID	Order Qty.	Rcvd. Qty.	Ship Qty.	Weight Entered - Lbs.	Weight Entered - Kgs.	Weight Ship - Lbs.	Weight Ship - Kgs.	Weight Recd - Lbs.	Weight Recd - Kgs.
►	1	1	Arrived	7227	Arrived	JTEST		10	0	10	0	0	2.5	1.13399256		

Synapse - [Order 7227-1 for Customer JTEST]

File Edit Lookup Requests Setup Window Utilities Billing Help

Order Info Summary Comments Addl. Info Receiving History Back Next + Up Down Cancel

Order ID: 7227 Ship ID: 1 Type: Transfer Customer ID: JTEST Cust PO: Reference: GOLD MATTE FRAMES

To Facility: Appointment Date/Time: RMA: Bill of Lading:

A 8/15/2007

Status: A Arrived Status by: JNOVICK Status Update: 8/10/2007 11:34:09 AM Priority: A Normal Supplier: One-Time

Load: 3415 Stop: 1 Shipment: 1 Load Status: Arrived Load Appointment Date/Time: Has Consumables

Wave:

Item	Order Qty.	UOM	Entered UOM	Rcvd. Qty.	Ship Qty.	Weight Entered - Lbs.	Weight Entered - Kgs.	Weight Rcvd - Lbs.	Weight Rcvd - Kgs.	Weight Ship - Lbs.	Weight Ship - Kgs.
GOLD MATTE FRAME	10	Each	Each	10	0	0				2.5000	

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

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Synapse - [Plate Lookup]

File Edit Lookup Requests Setup Window Utilities Billing Help

License Plate:	Facility:	Lot Number:	Location:	To Location:	<input type="checkbox"/> Multi-Pallets Only
<input type="text"/>	<input type="text"/> A	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Show Picked and Deleted LiPs
Customer ID:	QC Control ID:	Serial Number:	Inbound Load:	Status Update:	<input checked="" type="checkbox"/> QC Hold In Transit Deleted
JTEST	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Item:	Expires by:	Inventory Class:	Receipt Order ID:	PO:	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Inventory Status:	LiP Status:	Product Group:	User 1:		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
LIP Count:	Weight - Lbs.:				
3	167.5000				
Quantity:	Weight - Kgs.:				
22	75.9775				

Master Pallet Label	Customer	Item	Quantity	Location	Serial Number	UOM	Weight - Lbs.	Weight - Kgs.	Type	License Plate	Expiration Date	E
0000000000001612	JTEST	GOLD LEAF FRA	5	STG01		Case	25	11.3399	Pallet	0000000000001612		
0000000008100705	JTEST	GOLD MATTE F	10	081007		Each	2.5	1.1340	Pallet	0000000008100705		
0000000000001603	JTEST	TEAK SIDE TAB	7	STOR01		Case	140	63.5036	Pallet	0000000000001603		

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.

linux2 laptopsettings - Reflection for

File Edit Connection Setup Script Writ

11 Transfer Detail

Cust JTEST
Itm GOLD MATTE FRAME

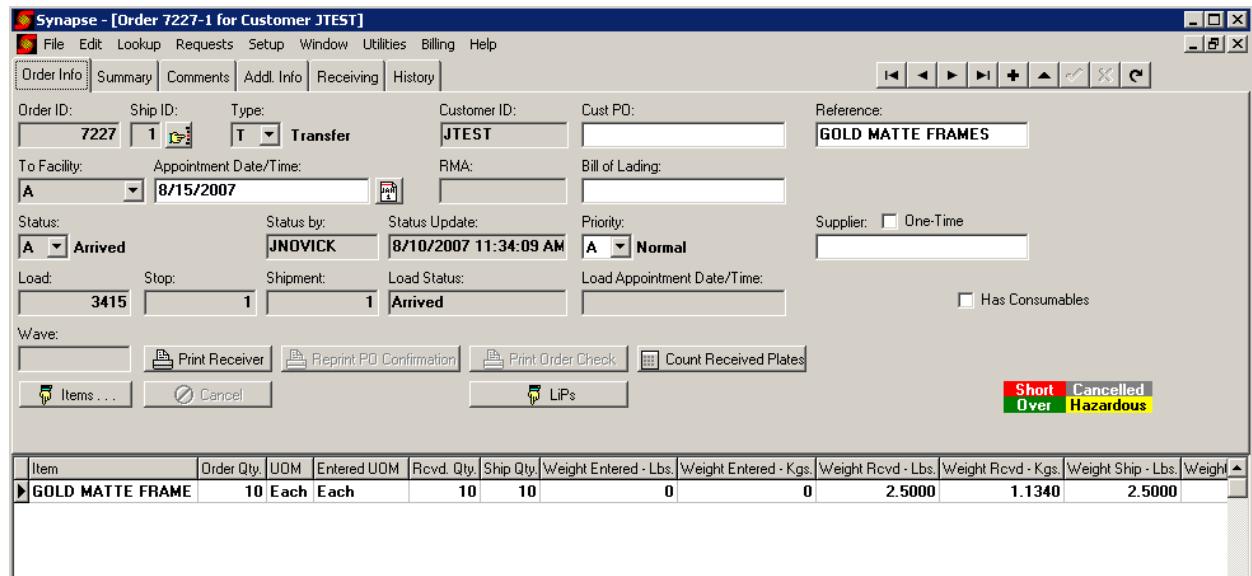
LP 08100705

Enter LP

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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 movement between the 2 facilities as the example below shows.

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Synapse - [License Plate Information for 000000008100705]

File Edit Lookup Requests Setup Window Utilities Billing Help

Main Info Addl Info | Back Forward Adjust Show Adjustments

LiP:	LiP Status:	Inventory Class:	User 1:
000000008100705	A Available	RG Regular	
Inventory Status:	Location:	Lot #:	User 2:
AV Available	A STOR01	081007	
Customer ID:	UOM:	Serial #:	User 3:
JTEST	EA Each		
Item:	Quantity:	Parent LiP:	LiP Type:
GOLD MATTE FRAME	10		PA Pallet
Weight - Lbs:	Weight - Kgs:		
2.5000	1.1340		

Activity Sub-Plates

Activity Date/Time	Item	Customer	Facility	Location	LiP Status	Inv. Status	Hold Reason	UOM	Quantity	Type	Serial #
8/10/2007 11:48:4	GOLD MATTE FRAME	JTEST	A	JSN	Moving	Available		Each	10	Pallet	
8/10/2007 11:48:2	GOLD MATTE FRAME	JTEST	A	JSN	Unassigned	Available		Each	10	Pallet	
8/10/2007 11:47:4	GOLD MATTE FRAME	JTEST	A	081007	In-Transit	Available		Each	10	Pallet	
8/10/2007 11:30:1	GOLD MATTE FRAME	JTEST	107	DOOR01G	Picked	Available		Each	10	Pallet	
8/10/2007 11:29:5	GOLD MATTE FRAME	JTEST	107	JSN	Picked	Available		Each	10	Pallet	
8/10/2007 11:29:5	GOLD MATTE FRAME	JTEST	107	DOOR01G	Picked	Available		Each	10	Pallet	
8/10/2007 11:29:4	GOLD MATTE FRAME	JTEST	107	TEST01	Available	Available		Each	10	Pallet	

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

Synapse - [Order 7227-1 for Customer JTEST]

File Edit Lookup Requests Setup Window Utilities Billing Help

Order Info Summary Comments Addl. Info Receiving History

Change Date	User ID	Action	LiP ID	Item	Lot	Short Message
8/10/2007 11:27:49	A/JNOVICK	CHANGE				Change order fields: loadno=[null]->[3415], s
8/10/2007 11:27:49	A/JNOVICK	Order To Load				Order Assigned to Load 3415/1/1
8/10/2007 11:28:04	A/JNOVICK	Order Arrived				Order Arrived at 107/DOOR01G
8/10/2007 11:29:47	A/JSN	Pick Plate	00000000485095	GOLD MATTE FRAME		Pick Qty 10 from LP:000000008100705
8/10/2007 11:29:54	A/JSN	Load Plate	00000000485095	GOLD MATTE FRAME	081007	Load plate Qty 10
8/10/2007 11:30:19	A/JNOVICK	CHANGE				Change order fields: dateshipped=[null]->[1C
8/10/2007 11:30:19	A/JNOVICK	Order Closed				Order Closed
8/10/2007 11:34:09	A/JNOVICK	Order Arrived				Order Arrived at A/DOOR02

Order Arrived at A/DOOR02

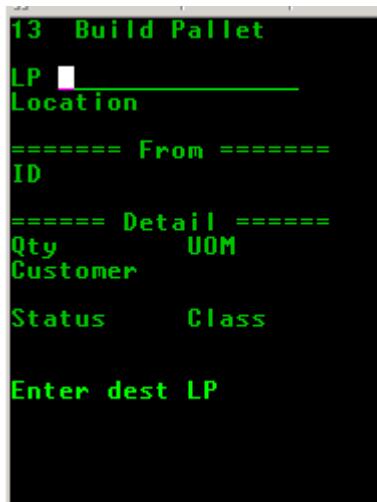
Item	Order Q	UOM	Entered UOM	Rcvd. Qty	Ship Qty	Weight Entered - Lbs.	Weight Entered - Kgs.	Weight Rcvd - Lbs.	Weight Rcvd - Kgs.	Weight Ship - Lbs.	Weight
GOLD MATTE FRAME	10	Each	Each	10	10	0	0	2.5000	1.1340	2.5000	

Return to Vendor

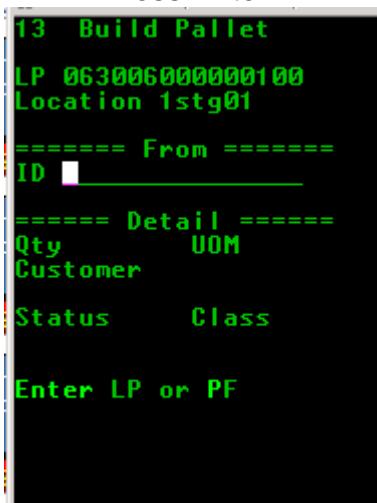
The order type 'Return To Vendor' is designed for the purpose of sending product back to the manufacturer that contains damages, defects, missing parts, etc. Pallets are built up with multiple items and quantities on the same LP (single-product LP's are also available for Return To Vendor orders). These 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.



- 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.



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

```
13 Build Pallet
LP 063006000000100
Location 1stg01

===== From =====
ID 062306000000200

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

Enter detail
```

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

```
13 Build Pallet
LP 063006000000100
Location 1stg01

===== From =====
ID 062306000000200

===== Detail =====
Qty 400 UOM EA
Customer CW
Item 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 063006000000100
Location 1stg01
===== From =====
ID █
===== Detail =====
Qty 400 UOM EA
Customer CW
Item 100E
Status OH Class RG

LP created
```

- The system will confirm that the new LP has been created.

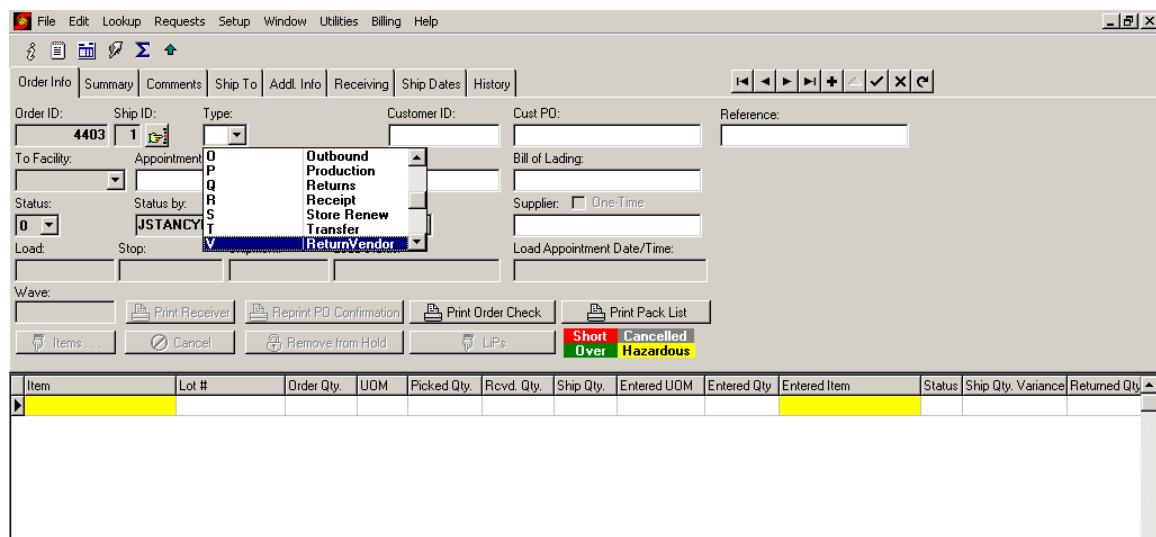
```
13 Build Pallet
LP 063006000000100
Location 1stg01
===== From =====
ID 111705000000100
===== Detail =====
Qty 25 UOM CS
Customer CW
Item 100H
Status OH Class RG
LOT 123

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.

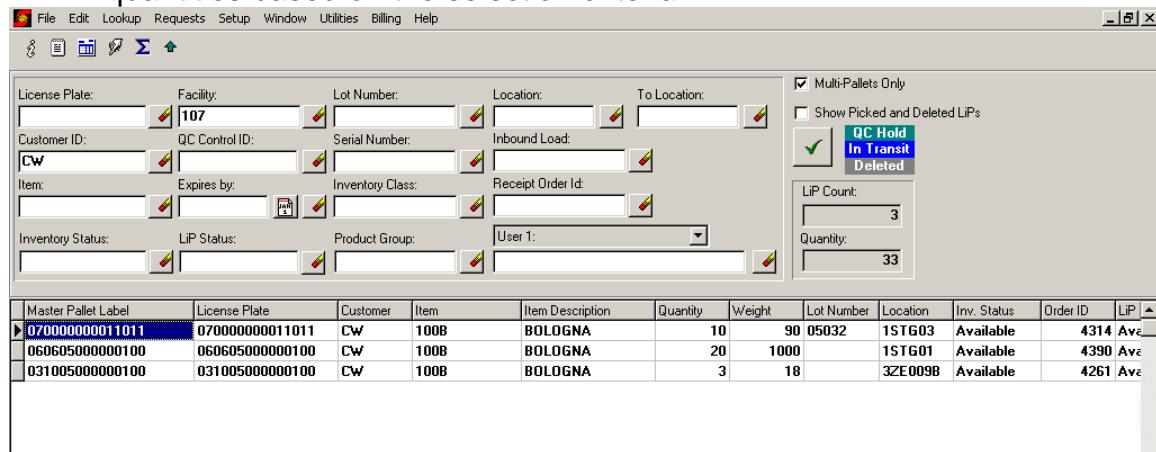
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Adding the Return to Vendor Order



Add the order with the following data

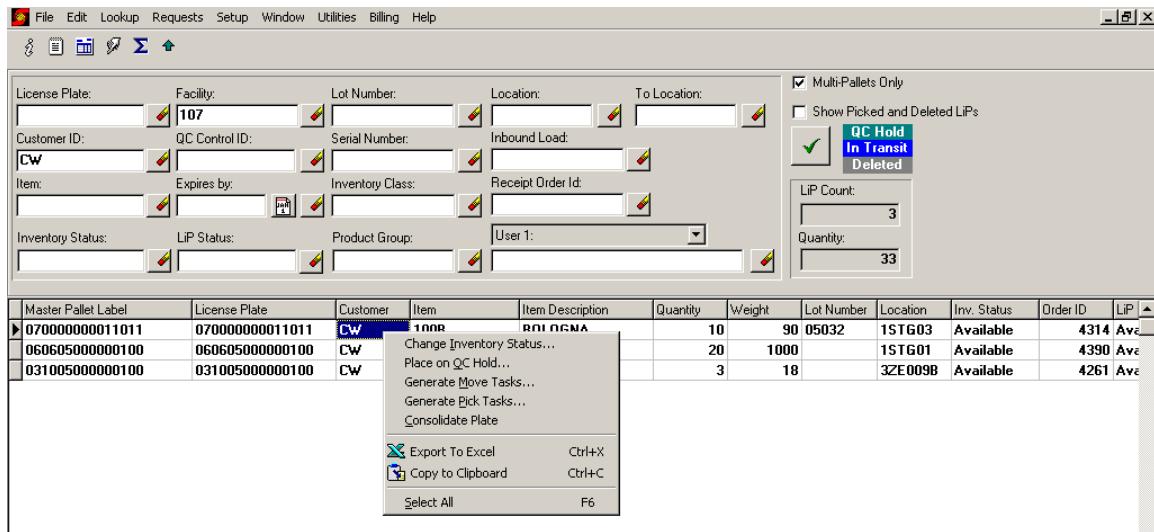
- Select V – ReturnVendor as the order type
- Enter in all of the shipping information
- The License Plate Lookup screen will automatically display the items and quantities based on the selection criteria.



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

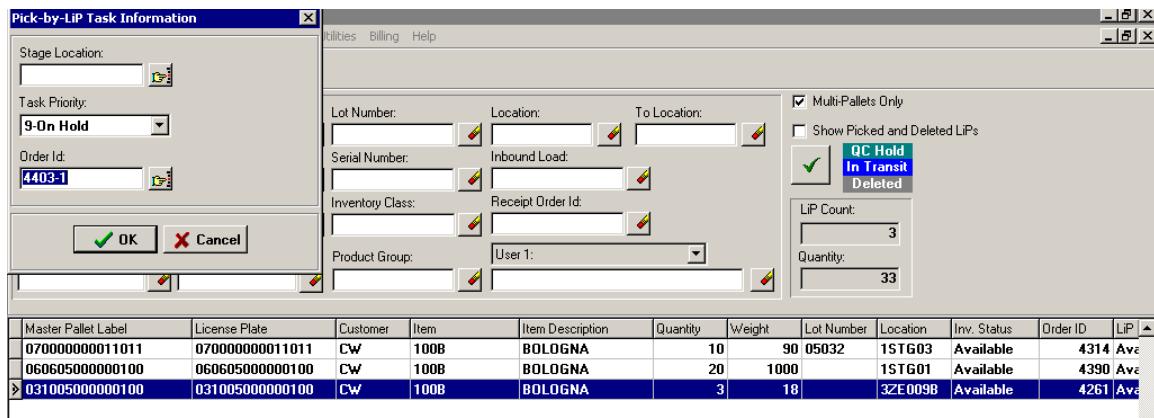
- Click on the Green check to display all of the Multi-Pallets.
- Or unselect the Multi-Pallets Only box to select from other pallets in inventory.

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- 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.

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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.