

Dock Operations

Transfer Orders

Prerequisite: Must have a Multiple Site Company

Where New Transfer Orders are located:

Dock Operations > Start a Task > New Transfer Order

What New Transfer Order does:

This function enables you to assign and move inventory to another physical site.

Why & When a Transfer Order is used:

Use a Transfer Order when you have inventory that must be moved to another facility.

How to Create a Transfer Order

1. Dock Operations > Start a Task > New Transfer Order
2. Fill in the yellow required fields first: Transfer Order Station, From Site, and To Site must be filled in. Some fields will autofill*.
* This is based on station policies
3. Fill in the Ship On Date and Deliver By Date if you know them
4. Locate the Load field. Click the down arrow to select a load.
5. If no loads are listed, click the plus icon beside Load Nbr* to Create a load.
* The Load Nbr window is the same as when selecting Dock Operations > Start a Task > New Transfer Load
6. Save
7. Double click in the middle of the empty grid field to create a product/addon line item.
8. To select a product type the desired SKU or under the Item heading to open a dropdown selection menu. Type in the commodity and stage and press TAB to populate the dropdown list.
9. Click the correct product.
10. Select and fill in the Quantity (Qty) any remaining criteria.
11. Double click in the middle empty grid to create additional product line items.
12. Highlight a product line, click the down arrow beside the Tag Number field to open a dropdown list of available matching tags OR scan/type in tag numbers.
13. Click the item row to have it autofill in the order.
14. If you do not wish to send the entire tag quantity you may Split the tag. See How to Split a Tag for instructions.
15. Press the Refresh Totals button in the lower right corner to refresh the totals of the bottom table.
16. Click the Bill of Transfer button at the top to print a Bill of Transfer.
17. Press the Loading Instructions button at the top to print Loading Instructions

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18. After assigning all tags to all product lines, Click the Mark as In Transit button near the top of the window. A popup window will open. Confirm the Load as Shipped by ;pressing the **Yes** button.
19. Save and close

Troubleshooting & Tips

- You may only use Transfer when you have multiple sites in one company. You must use **move** when you have multiple locations under a single site.
- To receive items on transfer you must make a Transfer Order Receipt

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