



Run Transfer Overview Report

Description

Use this task to run the *Transfer Overview* report. This report displays details on transfer orders shipping to and from an Agency. For transfer orders in status “Created”, the report can assist Agents in deciding how to modify their weekly replenishment order. Once the transfer order has shipped and is enroute to the Agency, the transfer orders in status “Shipped” can be printed prior to the truck arriving to aid the Agent in receiving the inbound transfer orders.

Trigger

Perform this task when updating Replenishment transfer orders, or when an inbound transfer order has shipped, prior to the truck arriving.

Prerequisites

Transfer orders for the Agency exist in the system.

Procedure

1. Begin this task by logging into the Enterprise portal.
2. Click **Retail** on the toolbar.

The screenshot shows the Enterprise portal interface. The top navigation bar includes links for Home, Procurement, Sales, Project management, Service management, Vendor portal, Customer self-service, Budgeting, and **Retail** (highlighted). The left sidebar lists various Retail reports under 'Common' and 'Reports' categories. The main content area is divided into sections: 'Store information' showing address, store number (30702), and name; 'Opening hours' from 12:00:00 AM to 12:00:00 AM; 'Stock counts' with an empty grid; and 'Receiving' orders with a table of inventory transfers.

Order number	Type	Delivery note number	Driver details
TO000000015	Inventory transfer		
TO000000031	Inventory transfer		
TO000000102	Inventory transfer		

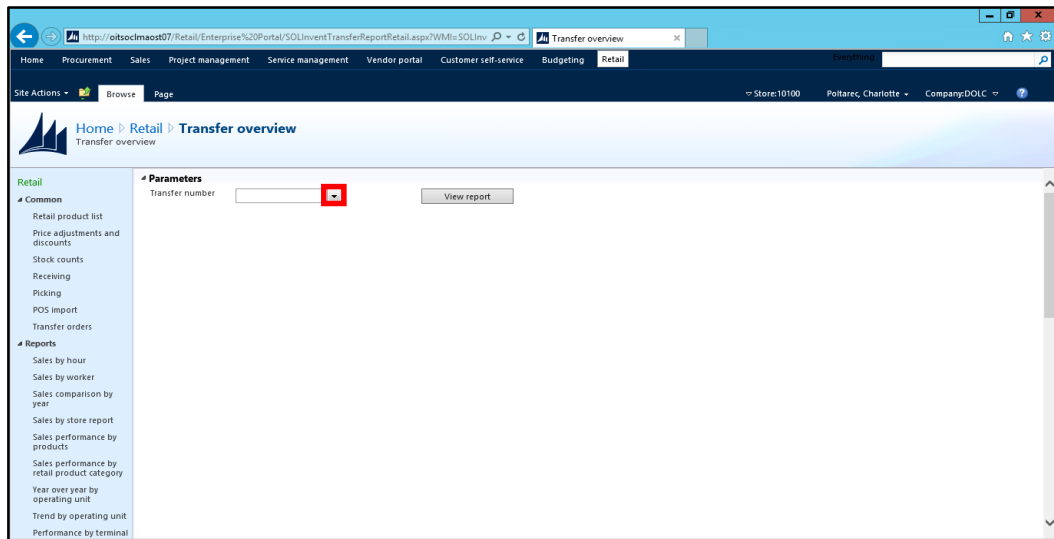
3. Scroll down as needed and click **Transfer overview** in the **Retail** panel to run the *Transfer overview* report.

The screenshot shows a web application interface for a retail system. The top navigation bar includes links for Home, Procurement, Sales, Project management, Service management, Vendor portal, Customer self-service, Budgeting, and Retail. The left sidebar contains a navigation menu with various reports, and 'Transfer overview' is highlighted with a red box. The main content area displays two tables: 'Receiving' and 'Picking', each with columns for Order number, Type, Delivery note number, and Driver details.

Order number	Type	Delivery note number	Driver details
TO000000015	Inventory transfer		
TO000000031	Inventory transfer		
TO000000102	Inventory transfer		

Order number	Delivery note number	Driver details
TO000000040		
TO000000054		

- Click  to the right of the **Transfer number** field to display a drop down list of transfer orders for the Agency.



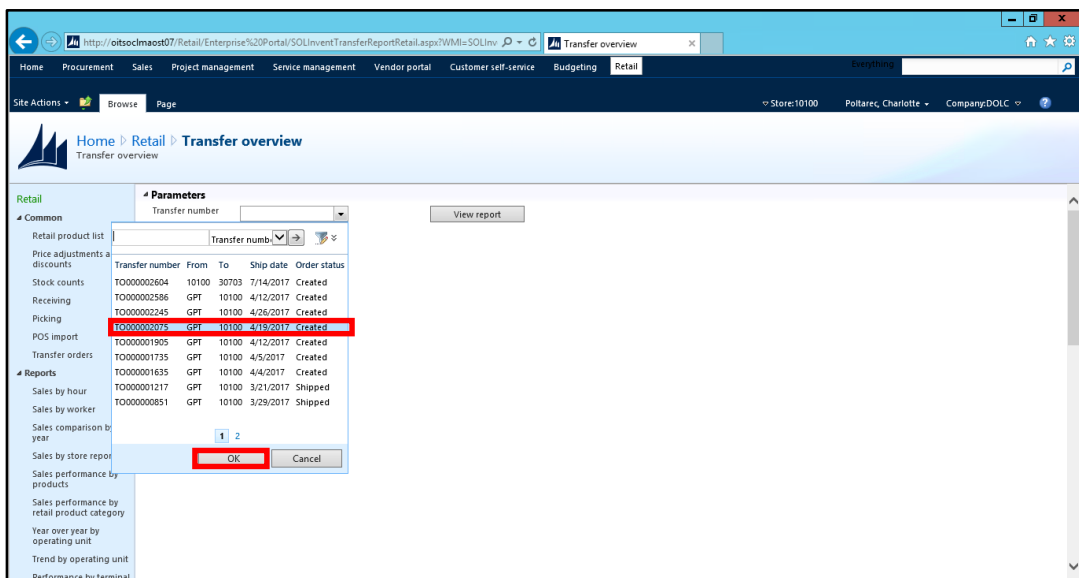
- Highlight the appropriate order. For this example, highlight **Transfer number** “TO000002075.”



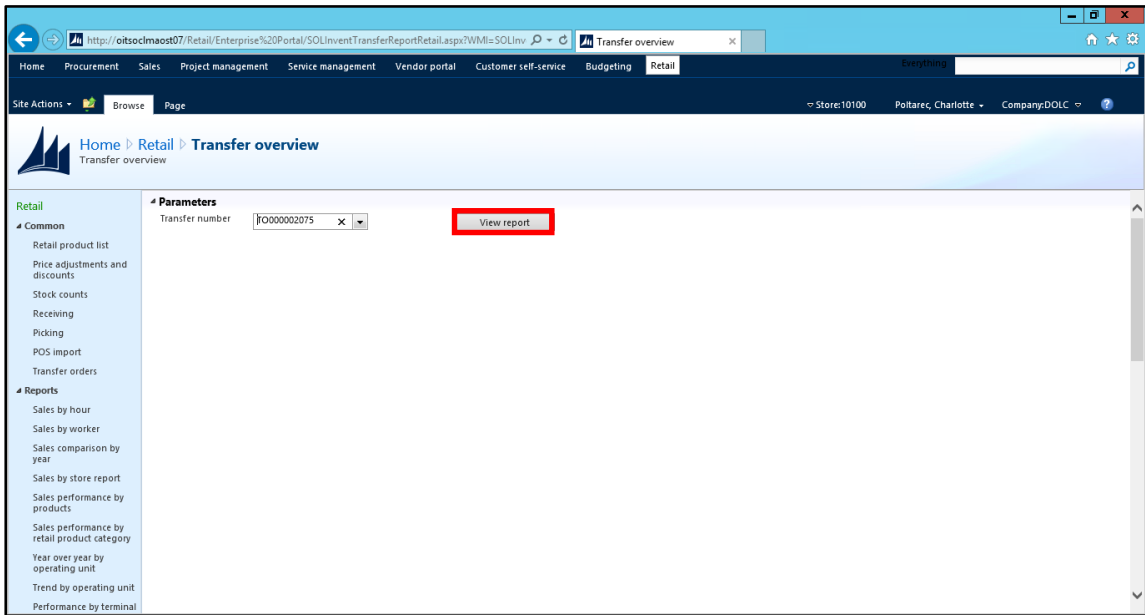
To aid in modifying a weekly replenishment order prior to submitting, the order must be in **Order status** “Created.”

If using this report to aid in receiving, the **Order status** must be “Shipped.”

- Click  .



7. Click **View report** to run the report for the selected transfer order.

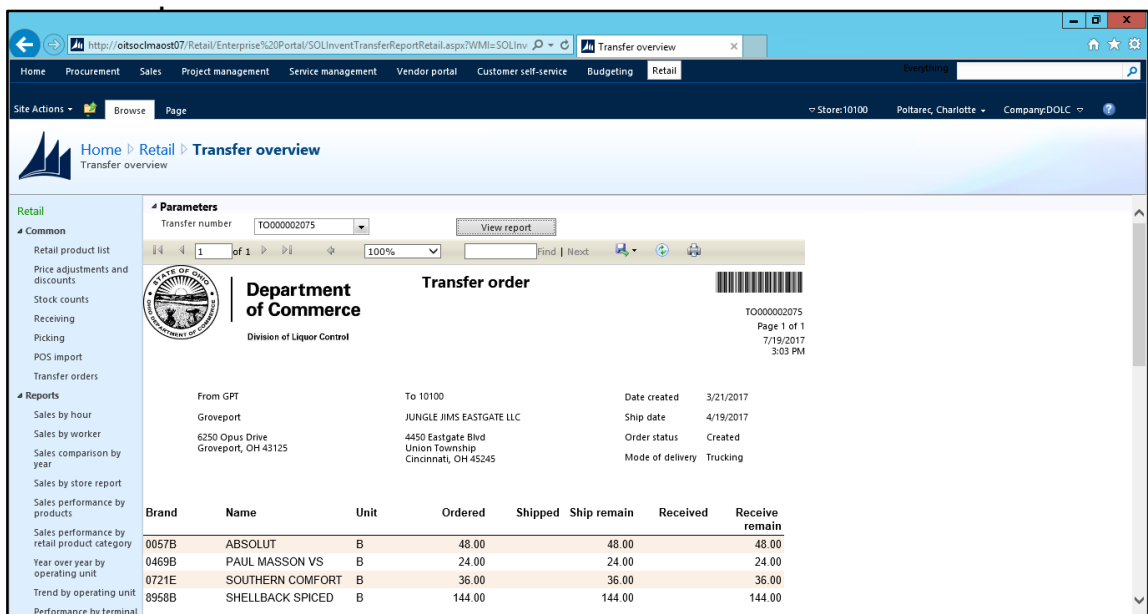


8. Review the displayed information.



You may need to scroll down and/or page down to see all product lines.

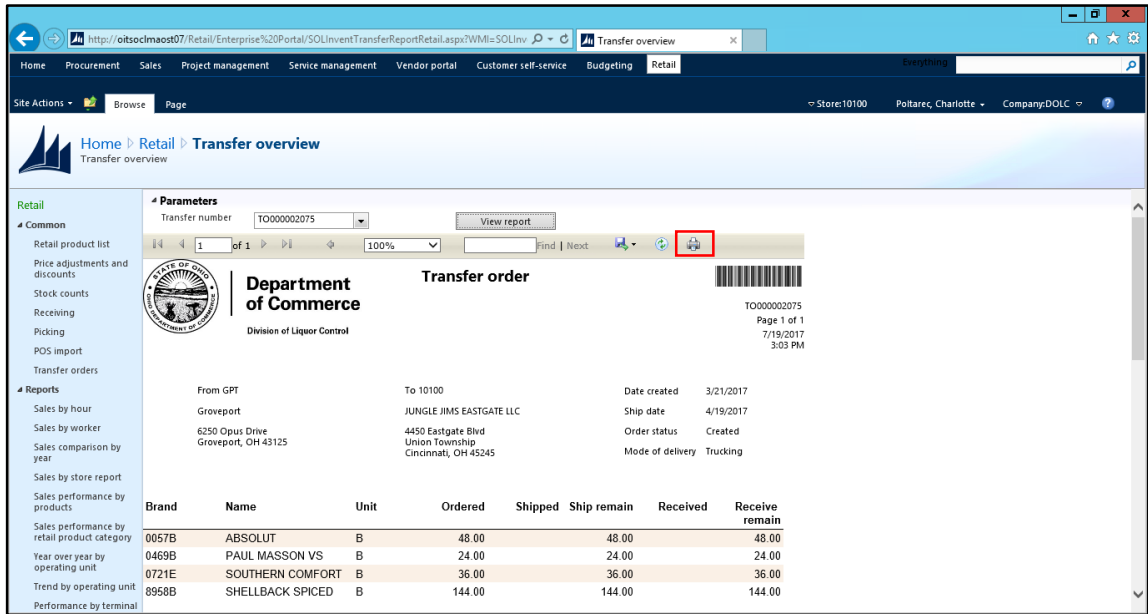
If the order is in status “Shipped”, the actual quantity shipped will appear in the **Shipped** column.



9. Click  to print the report.



If the printer icon is not available, you can also print by selecting CTRL+P on the keyboard to print the report.



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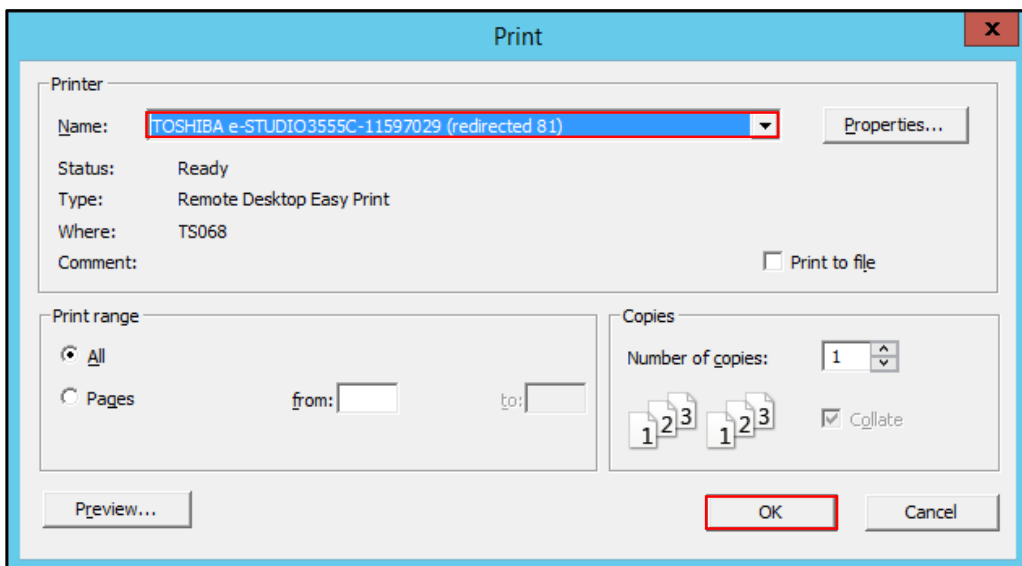
Transfer order

TO000002075
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Brand	Name	Unit	Ordered	Shipped	Ship remain	Received	Receive remain
0057B	ABSOLUT	B	48.00		48.00		48.00
0469B	PAUL MASSON VS	B	24.00		24.00		24.00
0721E	SOUTHERN COMFORT	B	36.00		36.00		36.00
8958B	SHELLBACK SPICED	B	144.00		144.00		144.00

10. Select the appropriate printer.

11. Click .



Print

Printer

Name: TOSHIBA e-STUDIO3555C-11597029 (redirected 81) Properties...

Status: Ready

Type: Remote Desktop Easy Print

Where: TS068

Comment: Print to file

Print range

All

Pages from: to:

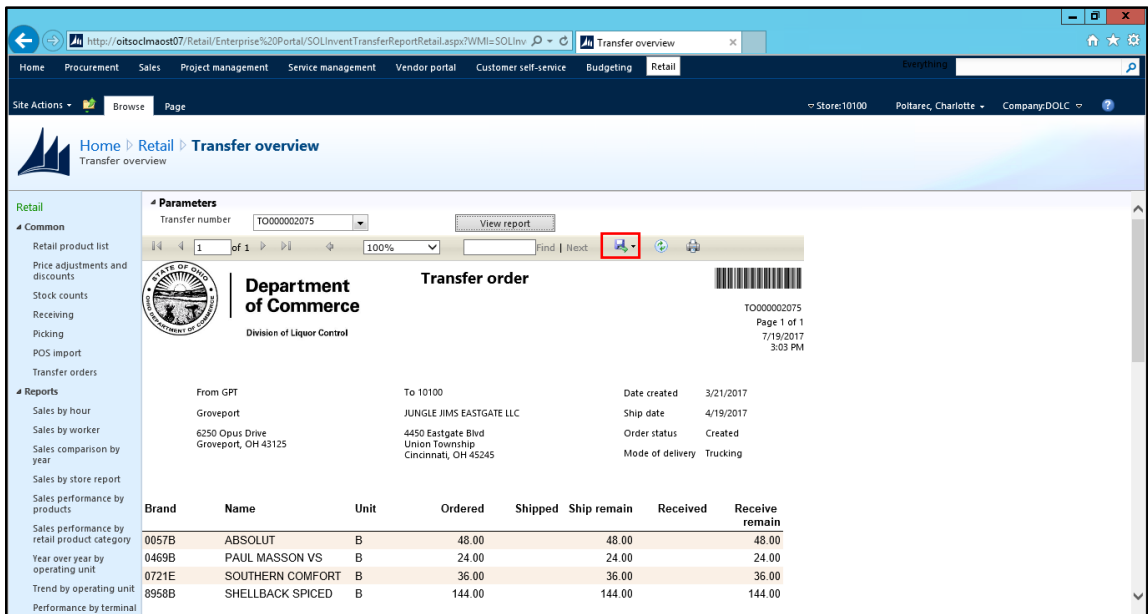
Copies

Number of copies: 1

Collate

Preview... OK Cancel

12. Click  to print the report to PDF.



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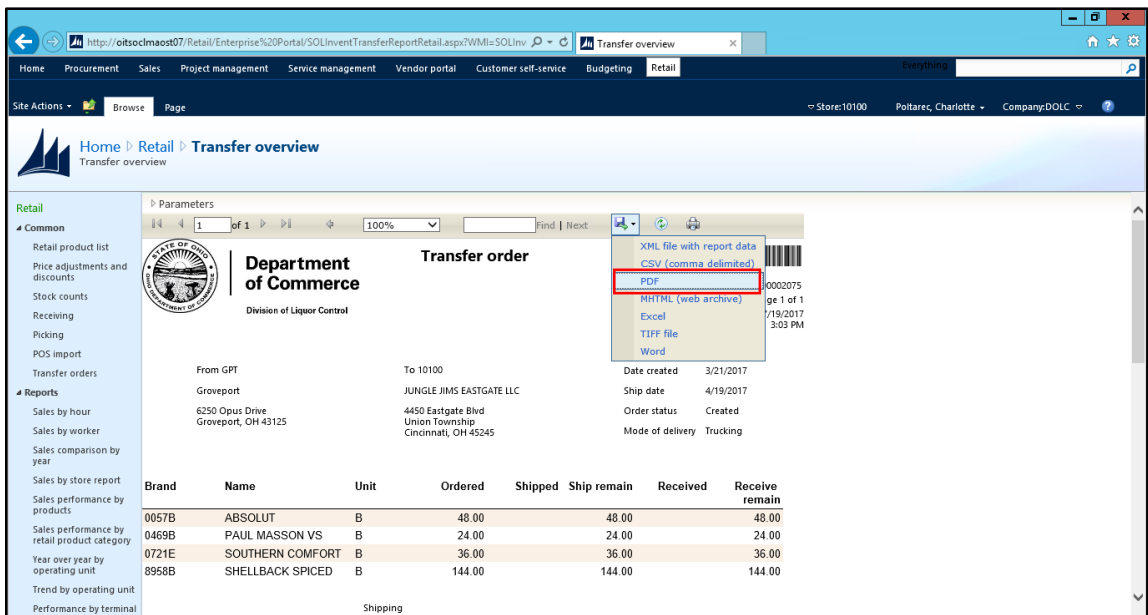
Transfer order

Transfer number: T0000002075

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Brand	Name	Unit	Ordered	Shipped	Ship remain	Received	Receive remain
0057B	ABSOLUT	B	48.00		48.00		48.00
0469B	PAUL MASSON VS	B	24.00		24.00		24.00
0721E	SOUTHERN COMFORT	B	36.00		36.00		36.00
8958B	SHELLBACK SPICED	B	144.00		144.00		144.00

13. Select **PDF** from the drop down list.



Transfer order

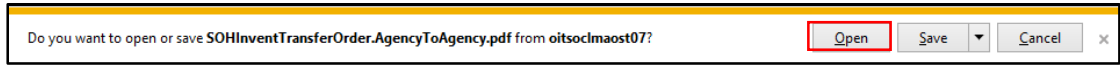
Transfer number: T0000002075

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Brand	Name	Unit	Ordered	Shipped	Ship remain	Received	Receive remain
0057B	ABSOLUT	B	48.00		48.00		48.00
0469B	PAUL MASSON VS	B	24.00		24.00		24.00
0721E	SOUTHERN COMFORT	B	36.00		36.00		36.00
8958B	SHELLBACK SPICED	B	144.00		144.00		144.00

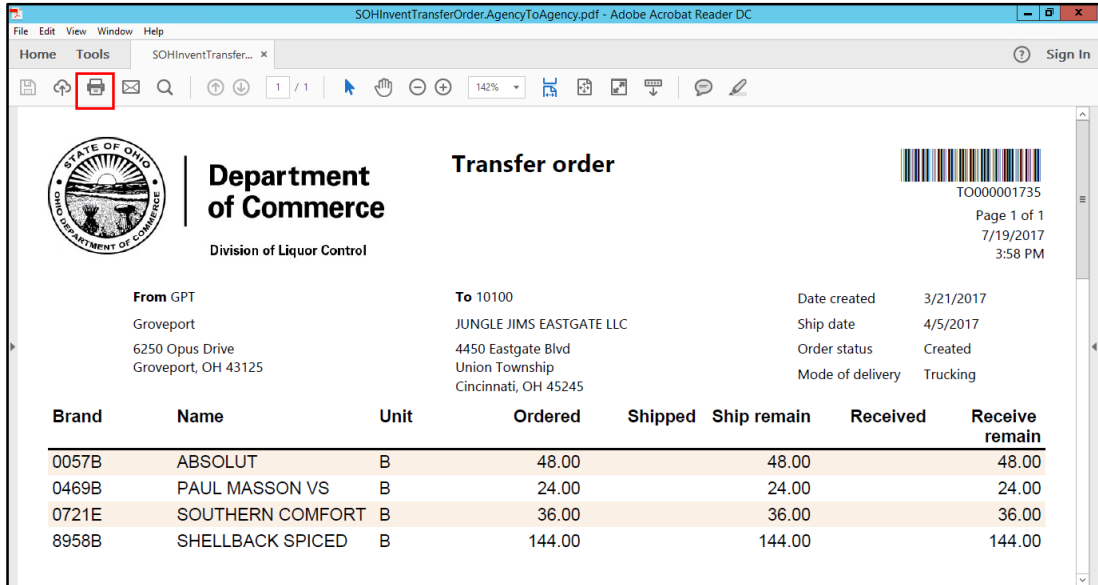
Shipping

14. If the following message appears at the bottom of the screen, click [Open](#) .



The order displays in PDF format.

15. Click  to print.



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Transfer order

TO000001735
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From GPT
Groveport
6250 Opus Drive
Groveport, OH 43125

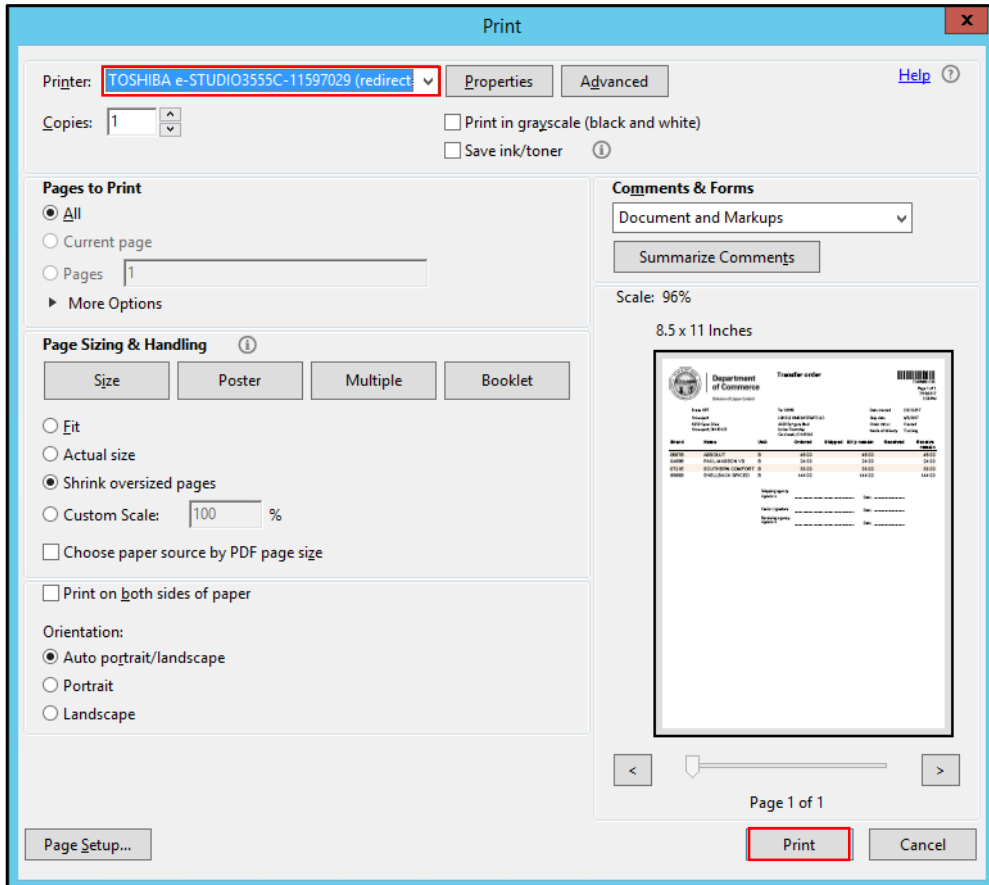
To 10100
JUNGLE JIMS EASTGATE LLC
4450 Eastgate Blvd
Union Township
Cincinnati, OH 45245

Date created 3/21/2017
Ship date 4/5/2017
Order status Created
Mode of delivery Trucking

Brand	Name	Unit	Ordered	Shipped	Ship remain	Received	Receive remain
0057B	ABSOLUT	B	48.00		48.00		48.00
0469B	PAUL MASSON VS	B	24.00		24.00		24.00
0721E	SOUTHERN COMFORT	B	36.00		36.00		36.00
8958B	SHELLBACK SPICED	B	144.00		144.00		144.00

16. Select the appropriate printer.

17. Click **Print** to complete this task.



Results

You have run and printed the *Transfer Overview* report.