



# Run Transfer Overview Report (Generate Report in “DOLC” Company)

## Description

Use this task to run the *Transfer overview* report. This report displays transfer order information including from and to locations, order status, items ordered, shipped and received quantities.

## Trigger

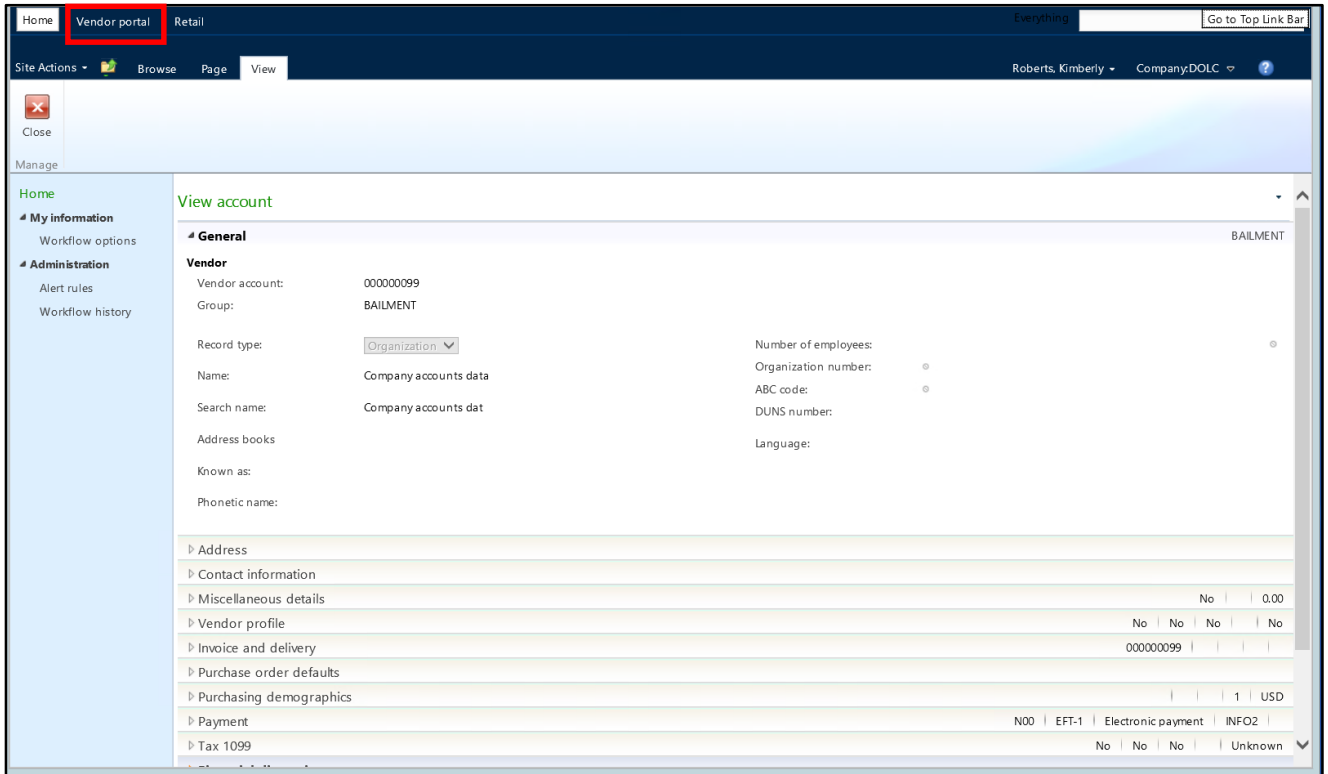
Perform this task when there is a need to view transfer orders.

## Prerequisites

Transfer orders exist in the system.

# Procedure

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



3. Click **Vendor reports** on the Vendor portal panel.

The screenshot shows a web application interface for a Vendor portal. At the top, there is a navigation bar with 'Home', 'Vendor portal', and 'Retail' tabs. A search bar contains 'Everything' and a 'Go to Top Link Bar' button. Below the navigation bar, there are 'Site Actions' and 'Browse Page' options. The user's name 'Roberts, Kimberly' and company 'Company:DOLC' are displayed in the top right.

The main content area is titled 'Home Vendor portal' and includes the profile information: 'Profile - Vendor account: 000000099, BACARDI USA INC'. The left sidebar contains a 'Vendor portal' menu with 'Common' and 'Reports' sections. The 'Reports' section has a red box around the 'Vendor reports' link.

The main content area is divided into two sections: 'Company information' and 'Contacts'. The 'Company information' section displays the following details:

|           |                                     |     |
|-----------|-------------------------------------|-----|
| Name:     | BACARDI USA INC                     | USD |
| Language: | en-us                               |     |
| Currency: | USD                                 |     |
| Address:  | 2701 LE JEUNE RD<br>Miami, FL 33134 |     |

The 'Contacts' section is a table with the following headers: Name, E-mail, Telephone, Job title, and Manager. The table is currently empty, with the text 'This grid is empty.' displayed in the center.

4. Click **Transfer overview** to display the search parameters to run the *Transfer overview* report.

The screenshot shows a web application interface with a dark blue header and a light blue sidebar. The main content area displays a list of reports under the 'Vendor reports' section. The 'Transfer overview' report is highlighted with a red box.

**Vendor portal**


Home ▸ Vendor portal ▸ Vendor reports

Vendor reports

Type to filter Title [v] [→] [🔍] [✕]

| Title  | Description   |
|--|---|
| <a href="#">Supply performance</a>                 | Print supply capacity   |
| <a href="#">DC Receiving</a>                       | Report the DC purchase order receipts that were completed within a given date range |
| <a href="#">DC inventory</a>                       | Print DC on-hand inventory  |
| <b><a href="#">Transfer overview</a></b>           | Generate report on existing transfer orders   |
| <a href="#">Vendor Inventory Adjustment Report</a> | View the inventory adjustment report  |
| <a href="#">Bailment PO and Invoice</a>            | Bailment PO and Invoice report  |
| <a href="#">Price Bulletin</a>                     | View the price bulletin report  |
| <a href="#">Agency information listing</a>         | Generate report with information about the agencies                                 |
| <a href="#">Product Information</a>                | View product information  |
| <a href="#">Price List</a>                         | View price list   |

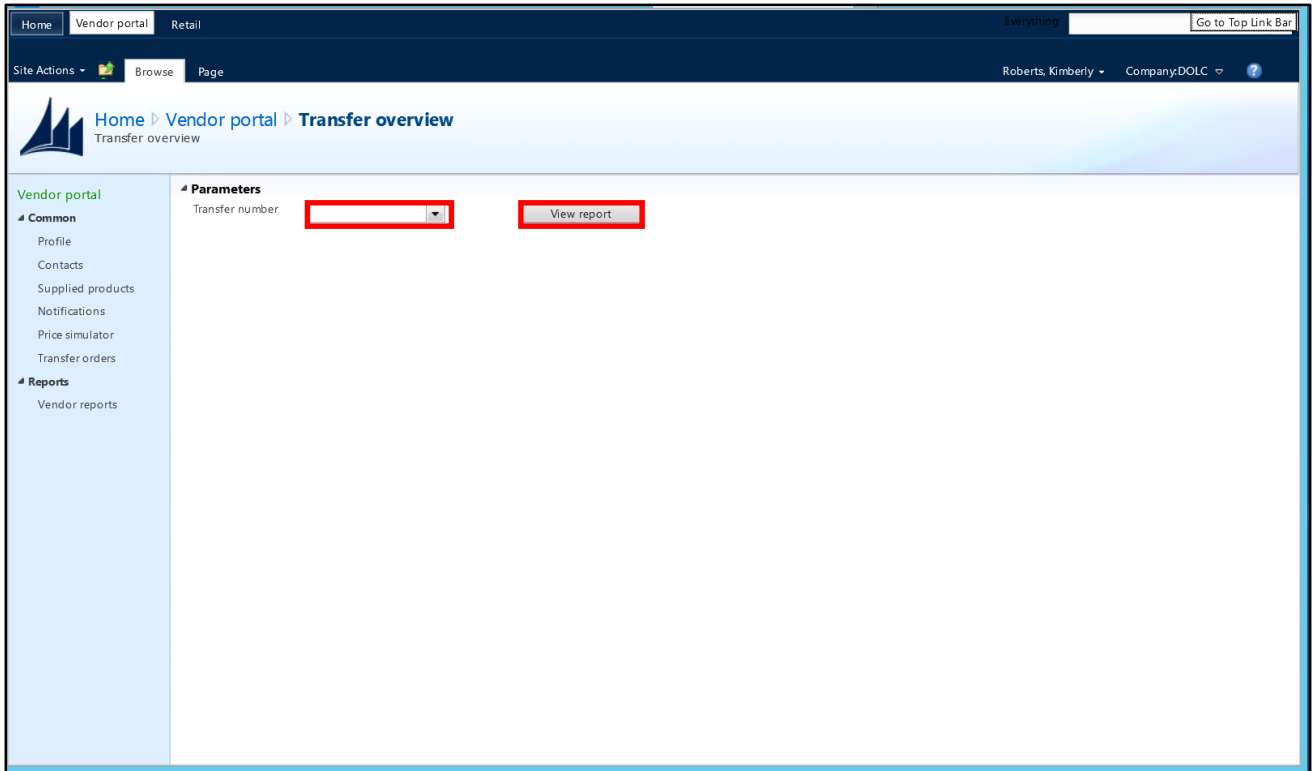
1 2

5. Click  in the **Transfer number** field and select the desired transfer order from the drop-down list. In this example, select “TO000002801.”



The transfer order number can also be entered directly into the **Transfer number** field.

6. Click  to display the transfer order.



The screenshot shows a web application interface for a 'Vendor portal'. The page title is 'Transfer overview'. In the 'Parameters' section, there is a 'Transfer number' field with a dropdown arrow and a 'View report' button. Both the dropdown arrow and the 'View report' button are highlighted with red rectangles. The left sidebar contains a 'Vendor portal' menu with options like 'Profile', 'Contacts', 'Supplied products', 'Notifications', 'Price simulator', 'Transfer orders', and 'Reports'.

## 7. Review the displayed information.

The screenshot displays a web application interface for a 'Transfer overview' report. The page header includes navigation tabs for 'Home', 'Vendor portal', and 'Retail'. A sidebar on the left lists various options under 'Vendor portal', including 'Common' (Profile, Contacts, Supplied products, Notifications, Price simulator, Transfer orders) and 'Reports' (Vendor reports). The main content area shows the report details for transfer number TO000002801, dated 6/8/2017. It lists the 'From' and 'To' parties: JUNGLE JIMS EASTGATE LLC and WAGNERS IGA MARKET INC. A table below summarizes the transfer items, showing one item: 0078B ANGELS ENVY B, with 18.00 units ordered, shipped, and received. The report also includes fields for shipping and receiving agency signatures and dates.

| Brand | Name        | Unit | Ordered | Shipped | Ship remain | Received | Receive remain |
|-------|-------------|------|---------|---------|-------------|----------|----------------|
| 0078B | ANGELS ENVY | B    | 18.00   |         | 18.00       |          | 18.00          |

## 8. Click any link on the Vendor portal panel to perform another task.

### Results

You have run the *Transfer overview* report.