



Inventory Transfer Dispatch for Backorder

How to create Inventory Transfer Dispatch to transfer parts from another location for Backordered Items

Software Development

RIMSS Business Systems Technology

Company Confidential

Copyright ©1983-2017 RIMSS Business Systems Technology

This Document contains information proprietary to RIMSS Business Systems Technology. Use or disclosure without written permission is expressly forbidden.

THESE INSTRUCTIONS APPLY TO MULTI-LOCATION DEALERSHIPS ONLY

Since you are a multi-location dealership, there is a new feature to allow you to transfer parts from one of your other locations to your location to satisfy a backorder(s).

This gives you the ability to transfer the part(s) from one or more of your other locations instead of ordering from your Supplier.

A Transfer Dispatch is created when the Sales Order or Repair Order is marked with a Transfer Quantity and the Sales Order or Repair Order is saved. If there are multiple transfer requests from the same location they will be added to the Open Transfer Dispatch, regardless of the age or the Transfer Dispatch date. Open Transfer Dispatches are driven by the requesting location and created in the transferring location. Once the Transfer Dispatch is marked as Shipped there will be a Transfer Receipt created in the receiving location. Until the receiving location marks the Transfer Receipt as Received the receiving locations QOH (Quantity on Hand) and AFS (Available for Sale) is not updated.

The screen shots shown in this Help Doc show examples of Parts Sales Orders. The same logic applies to Repair Order as well.

IMPORTANT – It is both the transferring locations and receiving locations responsibility to review the Transfer Dispatch and Transfer Receipt Lists to verify the status of those dispatches are correct and no Transfer Dispatch is in an Open status when the parts have already been physically shipped to the receiving location. The same applies to the receiving location that there are no Transfer Receipts marked as Shipped when the receiving location has physically received the parts. It is recommended that the locations review these lists frequently.

CREATING AN INVENTORY TRANSFER DISPATCH FOR BACKORDER(S)

In this example, we need to sell a quantity of 3. After entering the Qty. Sold, you receive the No Stock Pop-up showing you have 0 (zero) AFS. Based on the No Stock Pop-up display, you notice one of your other locations has plenty of stock. At this point, you can elect to Transfer 3 from the other location to your location to satisfy the backorder sale.

No Stock

Item Number	OEM Vendor #	OEM Division	Description
FF103	624		FILTER, FUEL
Package Qty	Qty On Hand	Qty Committed	AFS
12	0.0	0.0	0.0
			On Stock Order
			0.0

Company	Location	AFS	Transfer Request	Primary Bin	On Stock Order	QOH	QOO	Qty Committed	Qty Committed on Customer Order
	Location A	3 11.0000	0.0000	2H5D2	0.0000	11.0000	0.0000	0.0000	0.0000
	Location B	0.0000	0.0000		0.0000	0.0000	0.0000	0.0000	0.0000
	Location C	0.0000	0.0000		0.0000	0.0000	0.0000	0.0000	0.0000
	Location D	0.0000	0.0000		0.0000	0.0000	0.0000	0.0000	0.0000
>	Location E	2 0.0000	0.0000		0.0000	0.0000	0.0000	0.0000	0.0000

Qty: 3.0000 1

Associated Items

Assoc. Type	Price Book	Part Number	OEM Vendor	OEM Division	Description	Quantity R...	QOH	AFS	Bin	Cost Store ...
> Selected Item	FNH	FF103	624		FILTER, FUEL	1.0000	0.0000	0.0000		\$11.72

#1 Quantity needed for Sale
#2 AFS Quantity for your Location
#3 AFS Quantity for another Location

Processing the Transfer from Location A to Location E

No Stock

Item Number	OEM Vendor #	OEM Division	Description
FF103	624		FILTER, FUEL

Package Qty	Qty On Hand	Qty Committed	AFS	On Stock Order
12	0.0	0.0	0.0	0.0

CNH Info

Company	Location	AFS	Transfer Request	Primary Bin	On Stock Order	QOH	QOO	Qty Committed	Qty Committed on Customer Order
I	Location A	11.0000	4	2H5D2	0.0000	11.0000	0.0000	0.0000	0.0000
	Location B	0.0000	0.0000		0.0000	0.0000	0.0000	0.0000	0.0000
	Location C	0.0000	0.0000		0.0000	0.0000	0.0000	0.0000	0.0000
	Location D	0.0000	0.0000		0.0000	0.0000	0.0000	0.0000	0.0000
	Location E	0.0000	0.0000		0.0000	0.0000	0.0000	0.0000	0.0000

Qty: 3.0000

Sell Transfer **5** Sell AFS/BO Remaining Back Order Drop Ship Cancel

Associated Items

Assoc. Type	Price Book	Part Number	OEM Vendor	OEM Division	Description	Quantity R...	QOH	AFS	Bin	Cost Store ...
> Selected Item	FNH	FF103	624		FILTER, FUEL	1.0000	0.0000	0.0000		\$11.72

#4 Enter the Quantity needed in the Transfer Request box of the Transferring Location

#5 Press the Transfer button

After Saving the Sales Order, a new Transfer Dispatch will be created with an Open Status. Your Sales Order will reference the Transfer Qty. and Transfer Document. See next page for examples.

Sales Order showing Transfer Quantity and Transfer Dispatch Document

Name:	LEE CHESNUT	<input type="checkbox"/> Ship To	Shipping Method:	2 - Inbound - Our truck	Renameable Field
Address 1:	2710 LAUREL OAK DR		Shipment Date:	7/24/2019	<div style="border: 1px solid black; padding: 5px;"> <p>#6 Transfer Quantity</p> <p>#7 Transfer Dispatch Document #</p> </div>
Address 2:			Attention:		
Attention:			Address 1:		
City:	SAN ANTONIO		Address 2:		
State:	TX	Zip Code:	City:		
		75071	State:		
Primary Contact:	CHESNUT, ROWDY (888) 555-1212		Zip Code:		

Show Customer Information (F9)

Item Number (Ctrl-N): F2-Find Customer F3-Add Misc. Charges F4-Item Search F5-Apply Core Credits F10-Apply Discount 6 Ignore All Sales History 7

Ass... Part...	As...	Type	Item Number	Description	Bin	Quantity	List Price	Price	Amount	Subtotal	Sales Tax	Total	Force Sales Tax	Tax Group	Back Order	Drop Ship	Transfer Qty	Quantity Sold	Status	SO#	Weight	Invoice #	Transfer Documents
> @	D	Item	FF103-624	FILTER, FUEL		0.0000	\$17.90	\$17.900	\$0.000	\$0.00	\$0.00	\$0.00	<input type="checkbox"/>	PA Taxable	0.0	<input type="checkbox"/>	3.0000	0.0000	Open	0	0.54		(4076)

IMPORTANT

The Transfer Dispatch will stay in an Open Status until the Status has been changed to Shipped. If there are any Transfer Dispatches in an Open Status they will be added to with any additional transfer requests. It should be noted that Transfer Dispatches and Transfer Receipts are reviewed daily to make sure they are processed as needed. A Transfer Dispatch must have a Status of Shipped to remove the Items from Inventory at the transferring location. A Transfer Receipt must have a Status of Received to add the Item to On Hand and Committed at the receiving location.

Transfer Dispatch Status Definitions (Transferring location)

Open Items have not been removed from Inventory at transferring location – On Hand NOT Updated

Shipped Items have been removed from Inventory at transferring location – On Hand marked as Committed at transferring location

Transfer Receipt Status Definitions (Receiving location)

Shipped Items have been shipped from the transferring to location to the receiving location but not received.

Received Items have been received at the receiving location

Inventory List showing items Committed in transferring location

Select...	Inactive	Associations	Location	Price Book	Item Number	Oem Vendor	Oem Division	Description	Average Cost	QOO	QOH	Committed	AFS	Dollar Value	
	= False	ABC	ABC	ABC	ABC	ABC	ABC	ABC	=	=	=	=	≥	=	
> <input checked="" type="checkbox"/>	False	D	Location A	FNH	FF103	624		FILTER, FUEL	8.8700	0.0	11.0	8	3.0	8.0	\$97.57
<input checked="" type="checkbox"/>	False	D	Location B	FNH	FF103	624		FILTER, FUEL	11.1700	0.0	0.0	0.0	0.0	0.0	\$0.00
<input checked="" type="checkbox"/>	False	D	Location C	FNH	FF103	624		FILTER, FUEL	11.1700	0.0	0.0	0.0	0.0	0.0	\$0.00
<input checked="" type="checkbox"/>	False	D	Location D	FNH	FF103	624		FILTER, FUEL	11.1700	0.0	0.0	0.0	0.0	0.0	\$0.00
<input checked="" type="checkbox"/>	False	D	Location E	FNH	FF103	624		FILTER, FUEL	11.1700	0.0	0.0	9	0.0	0.0	\$0.00

#8 Item shows 3 Committed since Transfer Dispatch is in Open Status (Transferring Location)

#9 Item not showing Committed since Transfer Receipt is in Shipped Status (Receiving Location)

Processing the Transfer Dispatch (transferring location)

Inventory → Find → Inventory Dispatch

RIMSS WinNetStar Telephony Inventory Transfer Dispatch - 4076

Save Save and Close Save and New Print Void

General Attachments

Inventory Transfer

Location

From: Location A Shipping Date: 7/24/2019 Dispatch Status: Open Doc. #: 4076

To: Location E Shipping Method: Expected Delivery Date: Open

Memo: Transfer Request

Shipped

Change Dispatch Status from Open to Shipped

Processing the Transfer Receipt (receiving location)

Inventory → Find → Transfer Receipt

RIMSS WinNetStar Telephony Inventory Transfer Receipt - 5000313

Save Save and Close Print Void

General Attachments

Inventory Transfer

Location

From: Location A Received Date: 7/24/2019 Dispatch Status: Shipped Doc. #: 5000313

To: Location E Shipping Method: Expected Delivery Date: Shipped

Memo: Transfer Request

Received

Change Dispatch Status from Shipped to Received

Inventory List after Transfer Dispatch marked as Received

Location: Location E | Price Book: All Price Books | Item Number: ff103 | OEM Vendor: ALL | OEM Division: | Item Description:

Category: | Group: | Class: | Pricing Source: | Stock Class: | Include Catalog | Select All

Item Inventory Report Layout

Drag a column header here to group by that column

Select...	Inactive	Associations	Location	Price Book	Item Number	Oem Vendor	Oem Division	Description	Average Cost	QOO	QOH	Committed	AFS	Dollar Value
	= False								=	=	10	= 11	≥	=
	False	D	Location E	NH	FF103	624		FILTER, FUEL	8.8700	0.0	3.0	3.0	0.0	\$26.61

#10 QOH updated after Transfer Receipt marked Received

#11 Committed updated after Transfer Receipt marked Received

Since your Inventory Transfer Dispatch has been marked Received you can finalize your Sales Order or Repair Order.