

ORDER POWER!

Warehouse Transfers

**User Guide
Release 4.0.1**



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Computer Solutions, Inc. 1991-2001

Warehouse Transfers

Warehouse Transfers Document Version 4.0.1

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Warehouse Transfers

Warehouse Transfers options automate the process of determining what merchandise to move between your warehouses and stores. The **Warehouse Transfers** options are accessible from the *Inventory Control* menu (figure 1).

INV01 ANDREA	OP! 4.0 DEVELOPMENT - CO# 001 ORDER POWER! Inventory Control	10/11/01 DSP108S1
Select one of the following :		
24. Empty Locations Report	31. Replenishment Transaction List	
25. Suggested Warehouse Transfers	32. Add/Update Pick Replenishment	
26. Add/Upd Warehouse Transfer	33. Post Replenishments	
27. Warehouse Transfer Document	34. Receive from In-Transit Locn	
28. Post to In-Transit		
29. Receive from In-Transit		
30. Print In-Transit Shipment		
	51. AS/400 Operational Assistant	
	80. Main Menu	
	81. Change Company	
	90. Signoff	
		Bottom
Selection		
====> _		
F1=Help F3=Exit F9=Command Line F12=Cancel		
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Inventory Control menu (figure 1)

These options comprise **Warehouse Transfers**:

Option	Description
25. Suggested Warehouse Transfers	Display the <i>Suggested Warehouse Transfers panel (figure 5)</i> to set up a Transfer batch or list
26. Add/Upd Warehouse Transfer	Display the <i>Inventory Transfer Selection panel (figure 6)</i> to work with Transfer batches
27. Warehouse Transfer Document	Display the <i>Warehouse Transfer Document panel (figure 9)</i> to print a Warehouse Transfer Document
28. Post to In-Transit	Display the <i>Warehouse Transfers Post to In-Transit panel (figure 10)</i> to Post shipments
29. Receive from In-Transit	Display the <i>Receive From In-Transit Prompt panel (figure 11)</i> to receive transferred inventory into the destination warehouse
30. Print In-Transit Shipment	Display the <i>In-Transit Shipment List panel (figure 13)</i> to print an In-Transit Shipment List

Setting up *ORDER POWER!* for Warehouse Transfers

You must set up two areas of *ORDER POWER!* to use **Warehouse Transfers**.

- In-transit Warehouse and Location *see below*
- Item/Warehouse record..... *see page 3*

Using a *In-transit Warehouse* for Warehouse Transfers

When you are processing a **Warehouse Transfer**, *ORDER POWER!* uses a logical **Warehouse** (a **Warehouse** record that does not represent a physical place) to indicate the location of inventory after it has left its origin and before arriving at its destination.

To create an *In-transit Warehouse and Location*

1. From the *ORDER POWER! Main Menu*, select: **Work with Files>Warehouses** to display the *Warehouse Inquiry panel*, then press **F6=Create** to display the *Warehouse Prompt panel*.
2. Complete this field:

Warehouse

Type a user-defined code to identify a **Logical Warehouse** that you will use to indicate the location of inventory after it has left its origin and before arriving at its destination.

3. Press **Enter** to display the *Warehouse Update panel 1* (figure 2).

```

OPI 4.0 DEVELOPMENT - CO# 001
Warehouse Update

Warehouse      ITR                               ?Logistics Pro Warehouse ____
Description    In-Transit Warehouse
Address        In-Transit Warehouse
              _____

City, ?State   On the Road _____ , FL
Zip, ?Country 33015 _____ , US
Allow Customer Orders N Y/N      ?Default Inventory Location _____
Allow Blank Location Y Y/N      ?Default Receiving Location _____
Safety Stock in Days 000          Override GL Department ____ Blank, 000-
Pick Replenishment Overfill % 000
Pick: Only from Preferred Y Y/N
      If Y, Drive Negative N Y/N
      Other Non-bulk Locns N Y/N
      Bulk Locations N Y/N
      Outer Packs N Y/N
      Inner Packs N Y/N
      Selling UOM Units N Y/N
Delete _

F1=Help F3=Exit F4=?List F12=Cancel
  
```

Warehouse Update panel 1 (figure 2)

4. You must complete the following required fields. Accept all other defaults:

Description

Type a descriptive name for your **In-transit Warehouse**.

Address

Type any address to prevent this field from remaining blank.

City / State / Zip / Country

Type any **City** and a valid **State** and **Country**. **ORDER POWER!** will verify that the zip code actually exists in the State you entered, so be sure it is a correct combination.

Allow Blank Location

Type **Y**(es).

Pick: Only from Preferred

Type **N**(o).

Other Non-bulk Locns

Type **Y**(es).

Bulk Locations

Type **N**(o).

5. Press **Enter** twice to update the record and complete creating your **In-transit Warehouse**.

To set the In-transit Warehouse in the Company Profile

1. From the **ORDER POWER! Main Menu**, select: **Work with Files>Company Profile>F15 (Maintenance)>Inventory**, then Press **Enter** twice to display *Company Profile Update panel 3.1 (figure 3)*.

Company # 001	OP! 4.0 DEVELOPMENT - CO# 001 Profile Update	Panel 3.1
Characters to exclude in search triplets:		
This company. ~- @#%~&*()- =+¢!\;: ' " { } < > , . ? /		
Inventory Defaults:		
In-Transit Warehouse. ... <u>1TR</u>		
F1=Hel p F3=Exi t F12=Cancel F22=Audi t		

Company Profile Update panel 3.1 (figure 3)

2. In the **In-Transit Warehouse** field, type the code for the logical warehouse you created in the previous section.
3. Press **Enter** to update the **Company Profile**.

Setting up the Item/Warehouse record for Warehouse Transfers

If you intend to use the **Suggested Warehouse Transfers** option , you must establish minimum and maximum quantities for each **Item** in its Item/Warehouse record in order for **Warehouse Transfers** to calculate how much inventory you will need to move.

To set up the Item/Warehouse record for Warehouse Transfers

1. From the **ORDER POWER! Main Menu**, select **Work with Files** → **Items** to display the *Item Selection panel*.
2. Complete the Item Code field, then press **Enter** to display the *Item Inquiry panel*.
3. Type **8** (Qty) beside the **Item** you want to work with to display the *Item Quantities Inquiry window*.
4. Type **2** (Change) beside the warehouse you want to work with to display the *Item Quantities Update panel* (figure 4).

TRAINS	OP! 4.0 DEVELOPMENT - CO# 001		
Great Train Robbery	Item Quantities Update		
	?Warehouse		
	AWB		
Preferred:			
?Pick Location	_____	Quantity on Hand	30.000
?Put Away Location	_____	Quantity on Pick	
?Receiving Location	_____	Quantity on PO	
?Ship Via	_____		
Stock Qty	_____		
Minimum Stock Level	10.000		
Maximum Stock Level	100.000		
E. O. Q. Level	_____		
Safety Stock in Days	_____		
?Cycle Code	A		
Replenishment Overfill %	_____		
F1=Help F3=Exit F4=?List F12=Cancel			Delete _

Item Quantities Update panel (figure 4)

5. Complete these fields:

Minimum Stock Level

Type the minimum quantity (in stocking units of measure) of an **Item** that you want kept on hand. **ORDER POWER!** uses this information in generating the **Items Below or At Minimum Report** which is run from the **ORDER POWER! Purchase Orders menu**.

Maximum Stock Level

Type the maximum quantity (in stocking units of measure) of an **Item** that you want kept on hand.

6. Press **Enter** to update the Item Quantity record.

Working with Warehouse Transfers

Suggested Warehouse Transfers

The **Suggested Warehouse Transfers** option allows you to set up the rules you want **ORDER POWER!** to apply when suggesting **Warehouse Transfers**. You can choose to create a list with or without a batch of transfer transactions. Batches do not take effect until you run the **Post to In-Transit** option.

To set up Suggested Warehouse Transfers

1. From *Inventory Control menu* (figure 1), select **Suggested Warehouse Transfers**, then press **Enter** to display the *Suggested Warehouse Transfers panel* (figure 5).

OP! 4.0 DEVELOPMENT - CO# 001			
Suggested Warehouse Transfers			
?From Warehouse.	_____		
Pick Sequence.		1=Highest Priority	
Bulk.	1		
Non-Bulk.	2		
Preferred Location.	3		
Pickable Locations Only. .	N	Y/N	
Retain Quantity.	1	1=Committed Orders + Warehouse Minimum	
		2=Committed Orders Only	
		3=All Orders + Warehouse Minimum	
		4=All Orders Only	
?To Warehouse.	_____		
Held Orders.	1	1=Include	2=Omit
Replenish to.	1	1=Minimum	2=Maximum
Select Items Below.	1	1=Minimum	2=Maximum
Phase Out Items.	1	1=Include	2=Omit
Create Batch.	N		3=Only
Use Current Printer Defaults	Y	Y/N	
Submit to Batch.	N	Y/N	
Save Changes.	N	Y/N	
F1=Help F3=Exit F4=?List F12=Cancel			

Suggested Warehouse Transfers panel (figure 5)

2. Complete these fields:

?From Warehouse

Type a user-defined code for the **Warehouse** from which you want to move inventory.

Pick Sequence: Bulk / Non-Bulk / Preferred Location

Type a sequence number (1-3) to indicate, in descending order, inventory locations that you want **ORDER POWER!** to suggest for picking **Warehouse Transfers**.

Pickable Locations Only

Type **Y**(es) or **N**(o) to indicate whether or not you want **ORDER POWER!** to suggest transferring only inventory from **Warehouse Locations** that you set up with **Y**(es) in the **Allow Pick** field.

Retain Quantity

Type a code to indicate the quantity of inventory you want to retain in the **From Warehouse**. **ORDER POWER!** will not suggest transfers that would cause inventory to fall below the selected level:

- 1=Committed Orders + Warehouse Minimum
- 2=Committed Orders Only
- 3=All Orders + Warehouse Minimum
- 4=All Orders Only

?To Warehouse

Type a user-defined code for the **Warehouse** to which you want to move inventory.

Held Orders

Type a code to specify whether to include held orders in the requirements for the **To Warehouse**.

- 1=Include
- 2=Omit

Replenish to

Type a code to specify the quantity of inventory you want to use in calculation requirements for the **To Warehouse**.

- 1=Minimum The minimum on hand quantity defined by you in the **To Warehouse's** Item/Warehouse record
- 2=Maximum The maximum on hand quantity defined by you in the **To Warehouse's** Item/Warehouse record
- 3=Entire From Qty The maximum quantity possible based on your selection in the **Retain Quantity** field above

Select Items Below

Type a code to specify which **Items** you want to transfer, based on the existing quantity in the **To Warehouse**.

- 1=Minimum Items below the minimum on hand quantity defined by you in the Item/Warehouse record
- 2=Maximum Items below the maximum on hand quantity defined by you in the Item/Warehouse record

Phase Out Items

Type a code to specify whether to include **Phase Out Items**.

- 1=Include
- 2=Omit
- 3=Only

Create Batch

Type **Y**(es) to indicate you want to create a **Transfer Batch** based on your selections, or **N**(o) to create a listing only.

Use Current Printer Defaults

Type a code to indicate whether to change the existing printer defaults for the current report.

- Y** (es) accept the existing printer defaults
- N** (o) display the *Printer Defaults panel* to make changes the current printer defaults

Submit to Batch

Type a code to indicate whether the report should be submitted to a job queue to process behind the scenes in batch mode and immediately free up your terminal or run the report interactively which locks the terminal until the report has completed.

- Y** (es) indicates that the report will be submitted as a batch job
- N** (o) indicates that the report will be run interactively

Save Changes

Type a code to indicate whether any changes you made should be permanently applied to subsequent displays of this panel. This eliminates redundant data entry.

- Y (es) save changes
- N (o) use print defaults this time only

3. Press **Enter** to create the **Suggested Warehouse Transfers** listing and batch.

Add/Update Warehouse Transfers

The **Add/Upd Warehouse Transfer** option allows you to view Suggested Item Transfers for the specific Originating/Destination warehouse pair that you specify. This can include **Items** from various different batches.

To work with Warehouse Transfer shipments

1. From *Inventory Control menu (figure 1)*, select **Add/Upd Warehouse Transfer**, then press **Enter** to display the *Inventory Transfer Selection panel (figure 6)*.

OPI 4.0 DEVELOPMENT - CO# 001
Inventory Transfer Selection

?Warehouse: From... ___
 To..... ___

F1=Help F3=Exit F4=?List F12=Cancel

Inventory Transfer Selection panel (figure 6)

2. Complete these fields:

?Warehouse: From/To

Type a user-defined code for the **Warehouses** you want to transfer inventory from and to.

3. Press **Enter** to display the *Inventory Transaction Inquiry panel (figure 7)*.

```

OP! 4.0 DEVELOPMENT - CO# 001
Inventory Transaction Inquiry

Position To: _____

2=Change 5=Display
Tran
Line Code Date Item Whs/Location Whs/Location Quantity
_ 45 014 9/28/01 TRAINS MIA GARY FTL 1.000

F1=Help F3=Exit F6=Create F7=Bkwd F8=Fwd F10=Top F12=Cancel F18=Bottom
Bottom

```

Inventory Transaction Inquiry panel (figure 7)

4. Type **2=Change** beside the **Item Transaction** you want to work with, then press **Enter** to display the *Warehouse Transfer Entry* (figure 8).

```

OP! 4.0 DEVELOPMENT - CO# 001
Warehouse Transfer Entry

Transaction Date: _/28/01

Line: 45
?Item: TRAINS Warehouse: MIA ?Location: GARY
Transfer To: Warehouse: FTL
Entry Quantity: 1.000 ?Unit of Measure: EACH

Info 1 _____
Info 2 _____
Info 3 _____
?REASON COD _____

F1=Help F3=Exit F4=?List F12=Cancel F23=User Delete: _

```

Warehouse Transfer Entry (figure 8)

5. Make any changes you want in these fields:

?Item

Type the **Item** code for the **Items** you want to transfer.

?Location

Type a **Location** code that exists in the **Warehouse** you are shipping from.

Entry Quantity

Type the quantity of **Items** in the Unit of Measure specified in the next field.

?Unit of Measure

Type the **Unit of Measure** that applies to this **Item**.

Info Fields 1 / 2 / 3

Type the requested information into these three user-defined fields.

?Reason Code

Type a user-defined code that indicates the reason for either the transfer, or for the manual change.

6. Press **Enter** to update the **Item Transaction**.

Warehouse Transfer Document

The **Warehouse Transfer Document** option creates a listing, similar to a pick list, to be used in the **From Warehouse** to pick inventory for transfer.

To create a Warehouse Transfer Document

1. From *Inventory Control* menu (figure 1), select **Warehouse Transfer Document**, then press **Enter** to display the *Warehouse Transfer Document* panel (figure 9).

OP! 4.0 DEVELOPMENT - CO# 001 Warehouse Transfer Document	
?Originating Warehouse	_____
?Destination Warehouse	_____
Sort By	1 1=Item 2=Location
Use Current Printer Defaults..	Y Y/N
Submit to Batch.....	N Y/N
Save Changes.....	N Y/N
F1=Help F3=Exit F4=?List F12=Cancel	

Warehouse Transfer Document panel (figure 9)

2. Complete these fields:

?Originating Warehouse

Type a user-defined code for the **Warehouse** to which you want to move inventory.

?Destination Warehouse

Type a user-defined code for the **Warehouse** from which you want to move inventory.

Sort By

Type a code to indicate the order in which you want **ORDER POWER!** to sort the **Warehouse Transfers** on the **Warehouse Transfer Document**.

- 1=Item
- 2=Location

Use Current Printer Defaults

Type a code to indicate whether to change the existing printer defaults for the current report.

- Y (es) accept the existing printer defaults
- N (o) display the *Printer Defaults* panel to make changes the current printer defaults

Submit to Batch

Type a code to indicate whether the report should be submitted to a job queue to process behind the scenes in batch mode and immediately free up your terminal or run the report interactively which locks the terminal until the report has completed.

Y (es) indicates that the report will be submitted as a batch job

N (o) indicates that the report will be run interactively

Save Changes

Type a code to indicate whether any changes you made should be permanently applied to subsequent displays of this panel. This eliminates redundant data entry.

Y (es) save changes

N (o) use print defaults this time only

3. Press **Enter** to create the **Warehouse Transfer Document**.

Post to In-Transit

The **Post to In-Transit** option creates a **Shipment** based on the records existing in the **Transfer Batch(es)** you have created for a specific Originating/Destination warehouse pair or to adds to an existing batch.

When the batches are posted, **ORDER POWER!** creates 014 (Inventory Transfer) transactions and moves the inventory to the **In-Transit Warehouse** you specified in the **In-Transit Warehouse** field on *Company Profile Update panel 3.1 (figure 3)*.

To post inventory to the In-Transit location

1. From *Inventory Control menu (figure 1)*, select **Warehouse Transfer Document**, then press **Enter** to display the *Warehouse Transfers Post to In-Transit panel (figure 10)*.

OP! 4.0 DEVELOPMENT - CO# 001
Warehouse Transfers Post to In-Transit

Create A New Shipment # :
?Originating Warehouse ___
?Destination Warehouse ___
Expected Shipment Date _____
Expected Receipt Date _____

OR

?Add to Existing Shipment # _____

F1=Help F3=Exit F12=Cancel

Warehouse Transfers Post to In-Transit panel (figure 10)

If you are creating a new shipment, complete these fields:
(**ORDER POWER!** uses this information, plus the Shipment Number to create a description of this shipment's location in the **In-Transit Warehouse**.)

?Originating Warehouse

Type a user-defined code for the storage area from which you want to move inventory. The **Warehouse** may be either a physical or logical warehouse, such as a retail store.

?Destination Warehouse

Type a user-defined code for the storage area to which you want to move inventory. The **Warehouse** may be either a physical or logical warehouse, such as a retail store.

Expected Shipment Date / Receipt Date

Type the dates you expect the shipment to leave and arrive at your **Warehouses**.

- or -

If you are adding to an existing shipment, complete this field.

?Add to Existing Shipment #

Type the number of the shipment to which you want to add inventory.



The **Shipment** number appears on the **Warehouse Transfers Posting** report., or you can press F4 in the **Add to Existing Shipment** field to select it from the *Shipment Inquiry* window.

4. Press **Enter** to post the shipment to the In-Transit location you specified in the **In-Transit Warehouse** field on *Company Profile Update panel 3.1 (figure 3)* and print the **Warehouse Transfers Posting** report.

Receive from In-Transit

When a shipment is received (physically) at the destination Warehouse, you must then use the **Receive from In-Transit** option to create 014 (Inventory Transfer) transactions to moves the inventory to the appropriate **Receiving Location** at that **Warehouse**.

To receive inventory from the In-Transit location

1. From *Inventory Control menu (figure 1)*, select **Receive from In-Transit**, then press **Enter** to display the *Receive From In-Transit Prompt panel (figure 11)*.

OP! 4.0 DEVELOPMENT - CO# 001
Receive From In-Transit Prompt

?Shipment Number _____
 ?Destination Warehouse _____
 Receive Date 10/01/01
 Commit Upon Receipt N Y/N

F1=Help F3=Exit/No Post F4=?List F15=Exit/Post

Receive From In-Transit Prompt panel (figure 11)

2. Complete these fields:

?Shipment Number
Type the shipment number you are receiving.

?Destination Warehouse
Type a user-defined code for the **Warehouse** that is receiving the inventory.

Receive Date
Type the date you are receiving the inventory.

Commit Upon Receipt
Type **Y**(es) or **N**(o) to indicate whether or not you want to commit the inventory you are receiving to customer orders upon receipt.



The **Destination Warehouse** field is a quality check. If the **Warehouse** code you enter does not agree with the Destination Warehouse related to the Shipment, **ORDER POWER!** will change it for you when you press **Enter**.

If this happens, check to see if you entered the correct shipment number.

3. Press **Enter** to display the *Warehouse Transfer Receive from Intransit panel* (figure 12).


```

                                OPI 4.0 DEVELOPMENT - CO# 001
00000007      Warehouse Transfer Receive from Intransit
MIA to FTL 10/04/01 10/05/01
1=Select 6=UOM
Pstn _____

Item/      Commit  Quantity to be  Qty Received  Whse
Description (Y/N)  Received      Today
TRAINS    N          14.000
Great Train Robbery

F1=Help F3=Exit F7=Bkwd F8=Fwd F10=Top F11=Select All F12=Cancel
F18=Bottom F23=Fully Receive
                                Bottom

```

Warehouse Transfer Receive from Intransit panel (figure 12)

4. Complete the receiving process as you would Purchase Orders in **ORDER POWER!**.

Print In-Transit Shipment

The **Print In-Transit Shipment** option creates a listing that can be used for Bill of Lading or insurance purposes.

To print the In-Transit Shipment List

1. From *Inventory Control menu* (figure 1), select **Print In-Transit Shipment**, then press **Enter** to display the *In-Transit Shipment List panel* (figure 13).

```

                                OPI 4.0 DEVELOPMENT - CO# 001
                                In-Transit Shipment List

Shipment Number ..... 1 1=All      2=Select
Print Item Cost ..... 4 1=Avg     2=Replacement 3=Last 4=None
Print Suggested Retail Price . Y Y/N
Use Current Printer Defaults.. Y Y/N
Submit to Batch..... N Y/N
Save Changes..... N Y/N

F1=Help F3=Exit F12=Cancel

```

In-Transit Shipment List panel (figure 13)

2. Complete these fields:

Shipment Number

Type the Shipment number for which you want the report.

Print Item Cost

Type a code to indicate which, if any, item cost (from the Item file) you want to appear on the report.

- 1=Average
- 2=Replacement
- 3=Last
- 4=None

Print Suggested Retail Price

Type **Y**(es) or **N**(o) to indicate whether or not you want to Print Suggested Retail Price (from the Item file) on the report.

Use Current Printer Defaults

Type a code to indicate whether to change the existing printer defaults for the current report.

- Y** (es) accept the existing printer defaults
- N** (o) display the *Printer Defaults panel* to make changes the current printer defaults

Submit to Batch

Type a code to indicate whether the report should be submitted to a job queue to process behind the scenes in batch mode and immediately free up your terminal or run the report interactively which locks the terminal until the report has completed.

- Y** (es) indicates that the report will be submitted as a batch job
- N** (o) indicates that the report will be run interactively

Save Changes

Type a code to indicate whether any changes you made should be permanently applied to subsequent displays of this panel. This eliminates redundant data entry.

- Y** (es) save changes
- N** (o) use print defaults this time only

3. Press **Enter** to create the **In-Transit Shipment List**.