

# Business Central Introduction Transfers

Used ERP=Microsoft Dynamics 365 Business Central

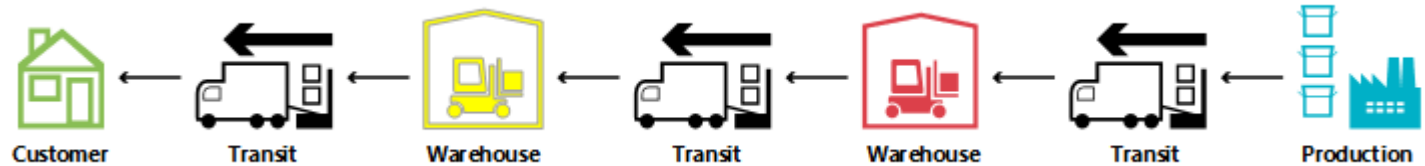
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# Transfers (Transfer items (goods) between warehouse locations)



A transfer order looks much like any other order in MS Dynamics 365 Business Central application. However, behind the scenes, it is very different.

One fundamental aspect that makes transfers in planning different from purchase and production orders (these types of orders **represent stock replenishment** actions) is that a transfer line represents demand and supply at the same time. **Replenishment System = Transfer** is used in so called **Stock Keeping Units** (we will be part of training in BPH\_PIS2 course)

The **outbound part**, shipped from the old location, is in **demand**.  
The **inbound part** to be received at the new location is supplied at that stock location.

# Structure of Transfer Order

Old version form of Transfer Order (NAV 2018) – very similar to BC from (window)

The screenshot shows the 'Edit - Transfer Order - 1011' window. The interface includes a ribbon with tabs for Home, Actions, Navigate, and Report. The 'General' section contains fields for No. (1011), Transfer-from Code (PINK), Transfer-to Code (RED), In-Transit Code (OWN LOG.), and Posting Date. The 'Lines' table below shows a single line item with Item No. AAA, Description 'Test Transfer 1', and a quantity of 17. Annotations include warehouse icons, demand and supply labels, and a red box around the 'OWN LOG.' field with a note about transport services.

**Warehouse** →

**Warehouse** →

**Demand (outbound)**

**Location PINK**  
17 pcs

**Supply (inbound)**

**Location RED**  
17 pcs

**OWN LOG.**

Own or foreign ("hired") transport services

Item No.	Description	Quantity	Reserved Quantity Inbrnd.	Reserved Quantity Shipped	Reserved Quantity Outbrnd.	Unit of Measure Code	Qty. to Ship
AAA	Test Transfer 1	17					17

# Structure of Transfer Order – Business Central

Transfer Order | Work Date: 1/23/2025

1010

Home Prepare Print/Send Order | More options

Post... Create Whse. Shipment Release Create Whse. Receipt Create Inventory Put-away/Pick...

**General** Show more

Transfer-from Code ..... RED In-Transit Code ..... OUT. LOG.  
Transfer-to Code ..... BLUE Posting Date ..... 1/23/2025  
Direct Transfer .....  Status ..... Released

Lines | Manage Functions Line Share Print

New Line Delete Line Select items...

Item No.	Description	Quantity	Reserved Quantity Inbnd.	Reserved Quantity Shipped	Reserved Quantity Outbnd.	Unit of Measure Code	Qty. to Ship	Quantity Shipp
→ 1896-S	ATHENS Desk	25	-	-	-	PCS		
1936-S	BERLIN Guest Chair, yellow	4	-	-	-	PCS		

Basically, it's a very similar form to NAV 2018.

The main distinction is the icons used to control operations

Shipment >

Transfer-from >

Transfer-to >

Warehouse >

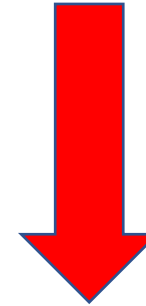
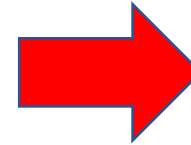
Foreign Trade >

# Inventory Locations and Bins

## Location



Code ↑	Name
BLUE	Blue Warehouse
GREEN	Green Warehouse
OUT. LOG.	Outsourced Logistics
OWN LOG.	Own Logistics
RED	Red Warehouse
SILVER	Silver Warehouse
WHITE	White Warehouse
YELLOW	Yellow Warehouse



Process Location Related Fewer options

Location ▾

Resource Locations /HITE Use As In-Transit

Zones White Warehouse

Bins

Address & Contact Show more

Address	Contact
Address ..... Merrily Grove Avenue 6, 2	Contact ..... <input type="text"/>
Address 2 ..... <input type="text"/>	Phone No. .... +44 (0)50 4567 9771
Post Code ..... WC1 2GS	Email ..... <input type="text"/>
City ..... West End Lane	Home Page ..... <input type="text"/>
Country/Region Code ..... GB	

## Inventory Zones

## Bin

See bins on the next slides

**A bin is the smallest specification of a storage position, which is therefore no longer divisible !!!**

# Locations I – stock (part of inventory management)

Code ↑	Name
BLUE	Blue Warehouse
GREEN	Green Warehouse
OUT. LOG.	Outsourced Logistics
OWN LOG.	Own Logistics
RED	Red Warehouse
SILVER	Silver Warehouse
WHITE	White Warehouse
YELLOW	Yellow Warehouse

**General**

Code ..... BLUE

Name ..... Blue Warehouse

Use As In-Transit .....

**Address & Contact** Show more

**Address**

Address ..... South East Street, 3

Address 2 .....

Post Code ..... B27 4KT

City ..... Birmingham

Country/Region Code .. GB

**Contact**

Contact ..... Jeff Smith

Phone No. .... +44-(0)20 8207 4533

Email .....

Home Page .....

Show on Map

**Edit - Online Map Setup**

Parameter Setup Page

**General**

Terms of Use ..... Microsoft Bing Maps Services Ag... Enabled

Privacy Statement ..... Microsoft Bing Maps Privacy Stat...

**Settings**

Map Parameter Setup ... BING

Route (Quickest/Short... Quickest

Show Distance in ..... Miles

If this field is checked, then the location is a car, truck, ship, train, plane  
In short, a means of transport...

# Locations II –setup for locations Blue or Red

**Warehouse**

Require Receive	<input checked="" type="checkbox"/>	Default Bin Selection	<input type="text"/>
Require Shipment	<input checked="" type="checkbox"/>	Outbound Whse. Han...	<input type="text"/>
Require Put-away	<input checked="" type="checkbox"/>	Inbound Whse. Handl...	<input type="text"/>
Use Put-away Worksh...	<input type="checkbox"/>	Base Calendar Code	<input type="text"/>
Require Pick	<input checked="" type="checkbox"/>	Customized Calendar	No
Bin Mandatory	<input checked="" type="checkbox"/>	Use Cross-Docking	<input type="checkbox"/>
Directed Put-away an...	<input type="checkbox"/>	Cross-Dock Due Date...	<input type="text"/>
Use ADCS	<input type="checkbox"/>		

In our models we will use only the **Blue** and **Red** locations.  
The other locations are set up for Advanced Warehousing (like location White)

# Locations III – setup for location White (Advanced Warehouse Management- see course PIS2)

Warehouse	
Require Receive	<input type="checkbox"/>
Require Shipment	<input type="checkbox"/>
Require Put-away	<input type="checkbox"/>
Use Put-away Worksh...	<input checked="" type="checkbox"/>
Require Pick	<input type="checkbox"/>
Bin Mandatory	<input type="checkbox"/>
Directed Put-away an...	<input checked="" type="checkbox"/>
Use ADCS	<input checked="" type="checkbox"/>
Default Bin Selection	<input type="text"/>
Outbound Whse. Han...	<input type="text"/>
Inbound Whse. Handl...	<input type="text"/>
Base Calendar Code	<input type="text"/>
Customized Calendar	No
Use Cross-Docking	<input checked="" type="checkbox"/>
Cross-Dock Due Date...	<input type="text"/>

Bins	
<b>Receipt</b>	
Receipt Bin Code	W-08-001
<b>Shipment</b>	
Shipment Bin Code	W-09-001
<b>Production</b>	
Open Shop Floor Bin ...	W-07-001
To-Production Bin Co...	W-07-002
From-Production Bin ...	W-07-003
<b>Adjustment</b>	
Adjustment Bin Code	W-11-001
<b>Cross-Dock</b>	
Cross-Dock Bin Code	W-14-001
<b>Assembly</b>	
To-Assembly Bin Code	<input type="text"/>
From-Assembly Bin C...	<input type="text"/>
Asm.-to-Order Shpt. ...	<input type="text"/>

## ADCS = Automated Data Capture System

The Automated Data Capture System (ADCS) solution provides a way for Business Central to communicate with handheld devices through web services. It would be best if you worked with a Microsoft partner who can provide the link between the web service and the specific handheld device.





# Bins I. (Location White in our demo BC version)

WHITE · White Warehouse

Process Location Related Fewer options

Zones Bins

Bins | Search + New Edit List Delete Open in Excel More options

Code ↑	Location Code	Description	Bin Type Code	Zone Code	Bin Ranking	Emp...	Ded...
→ W-01-0001	WHITE		PUTPICK	PICK	100	<input type="checkbox"/>	<input type="checkbox"/>
W-01-0002	WHITE		PUTPICK	PICK	90	<input checked="" type="checkbox"/>	<input type="checkbox"/>
W-01-0003	WHITE		PUTPICK	PICK	90	<input checked="" type="checkbox"/>	<input type="checkbox"/>
W-02-0001	WHITE		PUTPICK	PICK	100	<input type="checkbox"/>	<input type="checkbox"/>
W-02-0002	WHITE		PUTPICK	PICK	90	<input checked="" type="checkbox"/>	<input type="checkbox"/>
W-02-0003	WHITE		PUTPICK	PICK	90	<input type="checkbox"/>	<input type="checkbox"/>
W-03-0001	WHITE		PUTPICK	PICK	100	<input checked="" type="checkbox"/>	<input type="checkbox"/>
W-03-0002	WHITE		PUTPICK	PICK	90	<input checked="" type="checkbox"/>	<input type="checkbox"/>
W-03-0003	WHITE		PUTPICK	PICK	90	<input checked="" type="checkbox"/>	<input type="checkbox"/>
W-04-0001	WHITE		PUTPICK	PICK	100	<input checked="" type="checkbox"/>	<input type="checkbox"/>

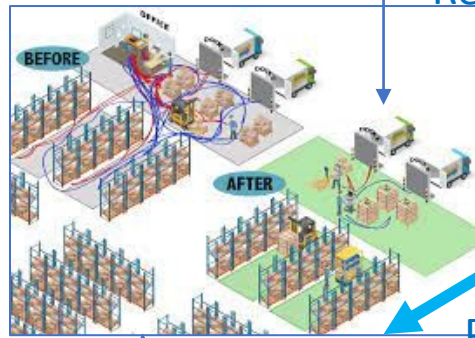
Bin numbers (codes). The bins are the smallest area (position) of the warehouse.  
Bins have several attributes (bin type, ranking, zone code, weight, volume, position)

**Bin Type Code** : you can either **put-away** items into bins or you can **pick** items from bins

# Put-away & Picking from the stock



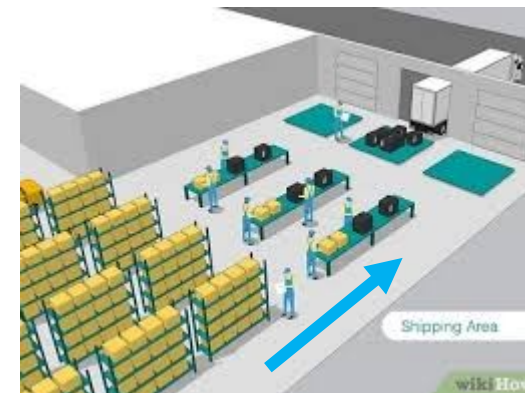
Receiving and inspection of goods



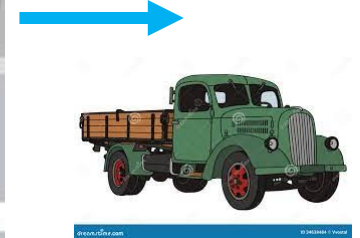
Put-away



Picking items by fork lift



Picking



# Bins II.

Bins | Search + New Edit List Delete Open in Excel **Related**

Bin Contents

TE		PUTPICK	PICK
----	--	---------	------

Bin Content | Search + New Edit List Delete Open in Excel

**Views** ×

**\*All** 📄 ⋮

Filter list by:

× Bin Code

× Location Code !

× Quantity

× Item No.

Bin Code ▼	Fixed	Default	Dedicated	Item No. ↑ ▼	Quantity
→ <u>W-01-0001</u>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LS-75	4
W-02-0001	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LS-120	10
W-02-0003	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LS-150	37
W-04-0012	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LS-10PC	20
W-04-0013	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LS-MAN-10	118
W-04-0014	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LS-2	17
W-04-0015	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LS-S15	12
W-05-0001	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LS-75	12
W-05-0002	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LS-120	6
W-05-0003	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LS-150	7
W-05-0004	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LS-10PC	38
W-05-0007	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LS-100	32
W-05-0008	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LSU-15	28

# Graphical representation I.

Location could be hall, shed or assembly shop



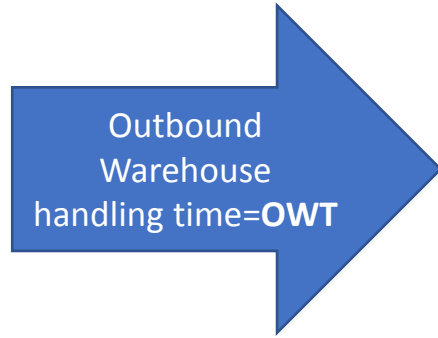
Inventory zone



Bin

# Times → Locations → Transfers

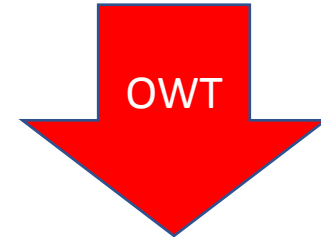
Blue location



Outsource/Own Location => Vehicle



Red location



Vendor Card | Work Date: 21/10/2022

10000 - London Postmaster

Process Request Approval New Document Navigate Vendor Actions Related Reports Fewer options

**General** Show more

No.	10000	Blocked		Balance Due (LCY)	117,201.40
Name	London Postmaster	Balance (LCY)	133,102.66		

Address & Contact Show less

**Receiving**

Location Code		Lead Time Calculation	3D
Shipment Method Code	CIF	Base Calendar Code	

Purchase Order and basic time parameters such as **Lead time**

# Parameters presented on previous slide I.

**Warehouse**

Require Receive  Bin Mandatory  Inbound Whse. Handling Time

Require Shipment  Directed Put-away and Pick  Base Calendar Code

Require Put-away  Use ADCS  Customized Calendar

Use Put-away Worksheet  Default Bin Selection

Require Pick  Outbound Whse. Handling Time  Use Cross-Docking

Cross-Dock Due Date Calc.

$OWHT + IWHT + ST = 2D + 3D + 1D = 6D$   
 (In this example). Later IWHT was changed to 2D only

**Transfer Routes**

◀ Previous Set ▶ Next Set

Options

Show  Show Transfer-to Name

Transfer Routes Matrix | Manage

Transfer-from Code 1	Transfer-from Name	BLUE	GREEN
→ BLUE	Blue Warehouse	...	...
GREEN	Green Warehouse	...	...
RED	Red Warehouse	OUT. LOG.	...
SILVER	Silver Warehouse	...	...
WHITE	White Warehouse	...	...
YELLOW	Yellow Warehouse	...	...

**General**

In-Transit Code  Shipping Agent Code

Shipping Agent Serv...

Code 1	Description	Shipping Time
→ NEXT DAY	Next day delivery	1D
STANDARD	Standard delivery	2D

**ST = Shipping Time**

# Parameters presented on previous slide I.

Customer Card

Another possibility to specify Shipping time on Customer card

**Shipping**

Ship-to Code	<input type="text"/>	Shipment Method	
Location Code	BLUE	Code	EXW
Combine Shipments	<input checked="" type="checkbox"/>	Agent	DHL
Reserve	Optional	Agent Service	OVERNIGHT
Shipping Advice	Partial	Shipping Time	1D

# Transfer Orders

Transfer Order | Work Date: 2/1/2022

1015

Report Release Posting Order Print/Send Navigate More options

**General** Show more

Transfer-from Code: BLUE Direct Transfer:  Posting Date: 2/1/2022

Transfer-to Code: RED In-Transit Code: OUT. LOG. Status: Open

Lines Manage More options

Item No.	Description	Quantity	Reserved Quantity Inbnd.	Appl.-to Item Entry	Reserved Quantity Shipped	Reserved Quantity Outbnd.	Unit of Measure Code	Qty. to Ship	Quantity Shipped	Qty. to Receive	Quantity Received	Shipment Date	Receipt Date
→ 1936-S	BERLIN Guest Chair, yellow	2	-	0	-	-	PCS	2	-			2/1/2022	2/6/2022

**Shipment** Show less

Shipment Date: 2/1/2022 Shipping Agent Code: FEDEX Shipping Advice: Partial

Outbound Whse. Handling Time: 2D Shipping Agent Service Code: NEXT DAY Receipt Date: 2/6/2022

Shipment Method Code: Shipping Time: 1D

**5 days**

Inbound WH handling time – location red =2 days -> **5 D** = 2D (Out WHSE HT Blue)+1D (shipping) + 2D (In WHSE HT Red)

WH = Warehouse



# Transfer Order – Posting two times (from **Blue Location** to Vehicle and From Vehicle to **Red Location**)

Ship  
 Receive

OK Cancel

Item Card | Work Date: 2/1/2022 **Item card**

1936-S · BERLIN Guest Chair, yellow

Process Item Prices & Discounts Request Approval Actions **Related** Fewer options

History Item **Availability** Purchases Sales Bill of Materials

Items by Location

No. Description

air, yellow

Blocked Type

### Items by Location

Options

Show Items in Transit

Column Set: OUT. LOG...OWN LOG.

No. 1	Description	OUT. LOG.
1928-W	ST.MORITZ Storage Unit/Drawers	-
1929-W	Conference Bundle 1-8	-
<b>→ 1936-S</b>	<b>BERLIN Guest Chair, yellow</b>	<b>6</b>
1952-W	OSLO Storage Unit/Shelf	-



Calculated field



# Item ledger entries (transactions) after 1st post action

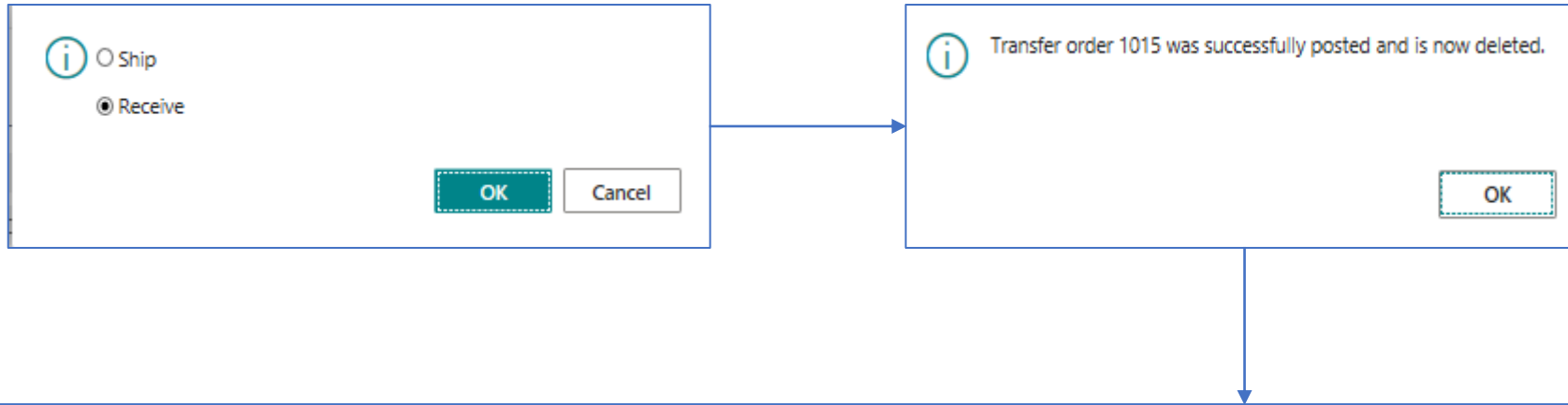
← Item 1936-S BERLIN Guest Chair, yellow | Work Date: 2/1/2022

Item Ledger Entries | Search | Entry | Open in Excel | Actions | Related | Fewer options

Posting Date	Entry Type	Docu... Type	Document No.	Item No.	Descrip...	Lot No.	Depar... Code	Project Code	Location Code	Quantity	Invoiced Quantity	Remaining Quantity	Sales Amount (Actual)	Cost Amount (Expected)	Cost Amount (Actual)
2/1/2022	Transfer	Transfe...	108010	1936-S		-			OUT. LOG.	2	2	2	0.00	0.00	195.00
1/28/2022	Transfer	Transfe...	109004	1936-S		-			OUT. LOG.	-5	-5	0	0.00	0.00	-487.50
1/28/2022	Transfer	Transfe...	108008	1936-S		-			OUT. LOG.	5	5	0	0.00	0.00	487.50
1/27/2022	Transfer	Transfe...	108005	1936-S		-			OUT. LOG.	4	4	4	0.00	0.00	390.00



# 2nd Posting of Transfer Order



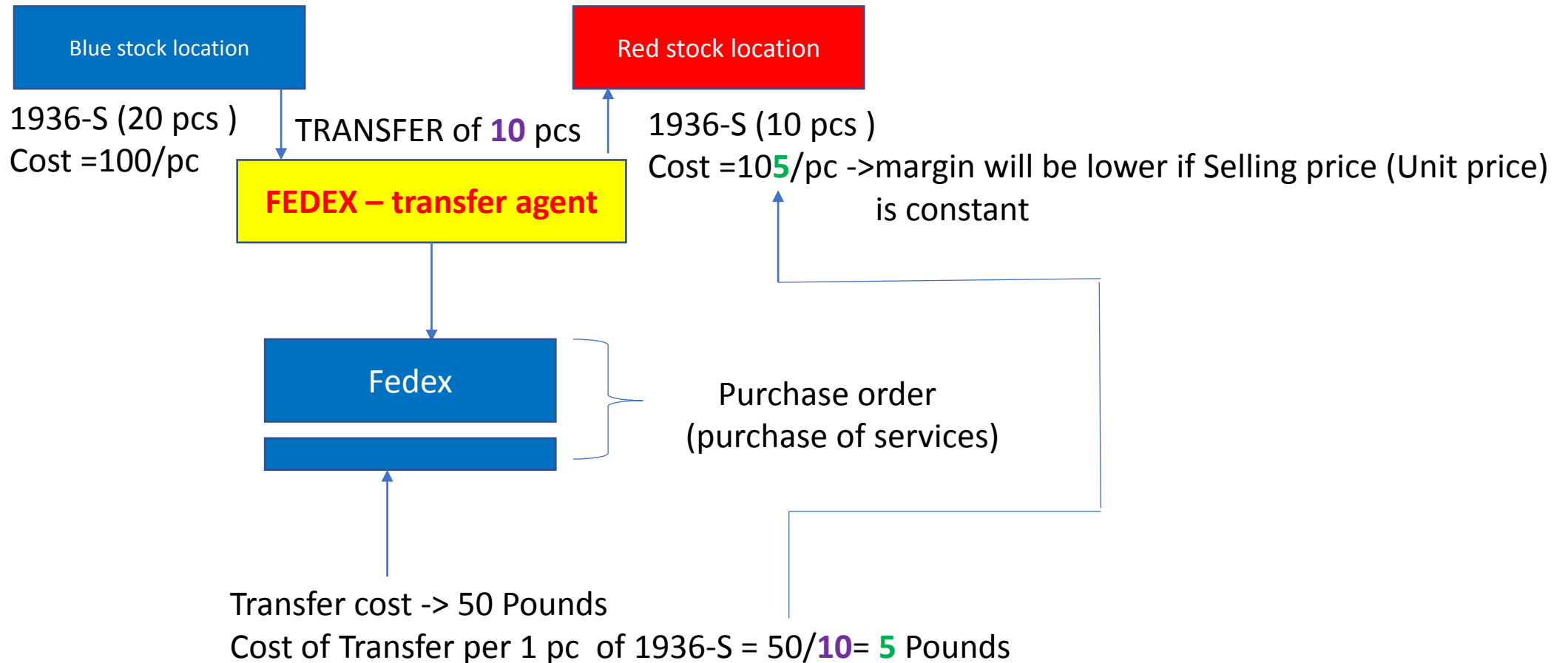
Item 1936-S BERLIN Guest Chair, yellow | Work Date: 2/1/2022

Item Ledger Entries | Search | Entry | Open in Excel | Actions | Related | Fewer options

Posting Date	Entry Type	Docu... Type	Document No.	Item No.	Descrip...	Lot No.	Depar... Code	Proje... Code	Location Code	Quantity	Invoiced Quantity	Remaining Quantity	Sales Amount (Actual) v	Cost Amount (Expected)	Cost Amount (Actual)	Cost Amount (Non-Invtbl.)	Open	Order Type	Entry No. 4
2/1/2022	Transfer	Transfe...	109006	1936-S		-			RED	2	2	2	0.00	0.00	195.00	0.00	<input checked="" type="checkbox"/>	Transfer	451
2/1/2022	Transfer	Transfe...	109006	1936-S		-			OUT. LOG.	-2	-2	0	0.00	0.00	-195.00	0.00	<input type="checkbox"/>	Transfer	450
2/1/2022	Transfer	Transfe...	108010	1936-S		-			OUT. LOG.	2	2	0	0.00	0.00	195.00	0.00	<input type="checkbox"/>	Transfer	449
2/1/2022	Transfer	Transfe...	108010	1936-S		-			BLUE	-2	-2	0	0.00	0.00	-195.00	0.00	<input type="checkbox"/>	Transfer	448

# Costing (applying additional cost for transfer)

Item number 1936-S Berlin Guest chair





"Isn't there an app for this sort of thing?"



THE END