

Business Central Introduction Transfers

Used ERP=Microsoft Dynamics 365 Business Central

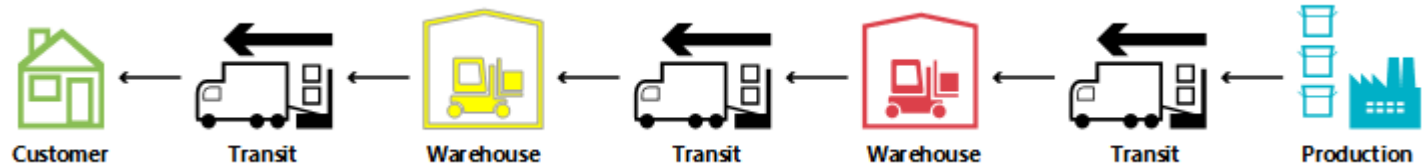
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Transfers (Transfer items (goods) between warehouse locations)



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

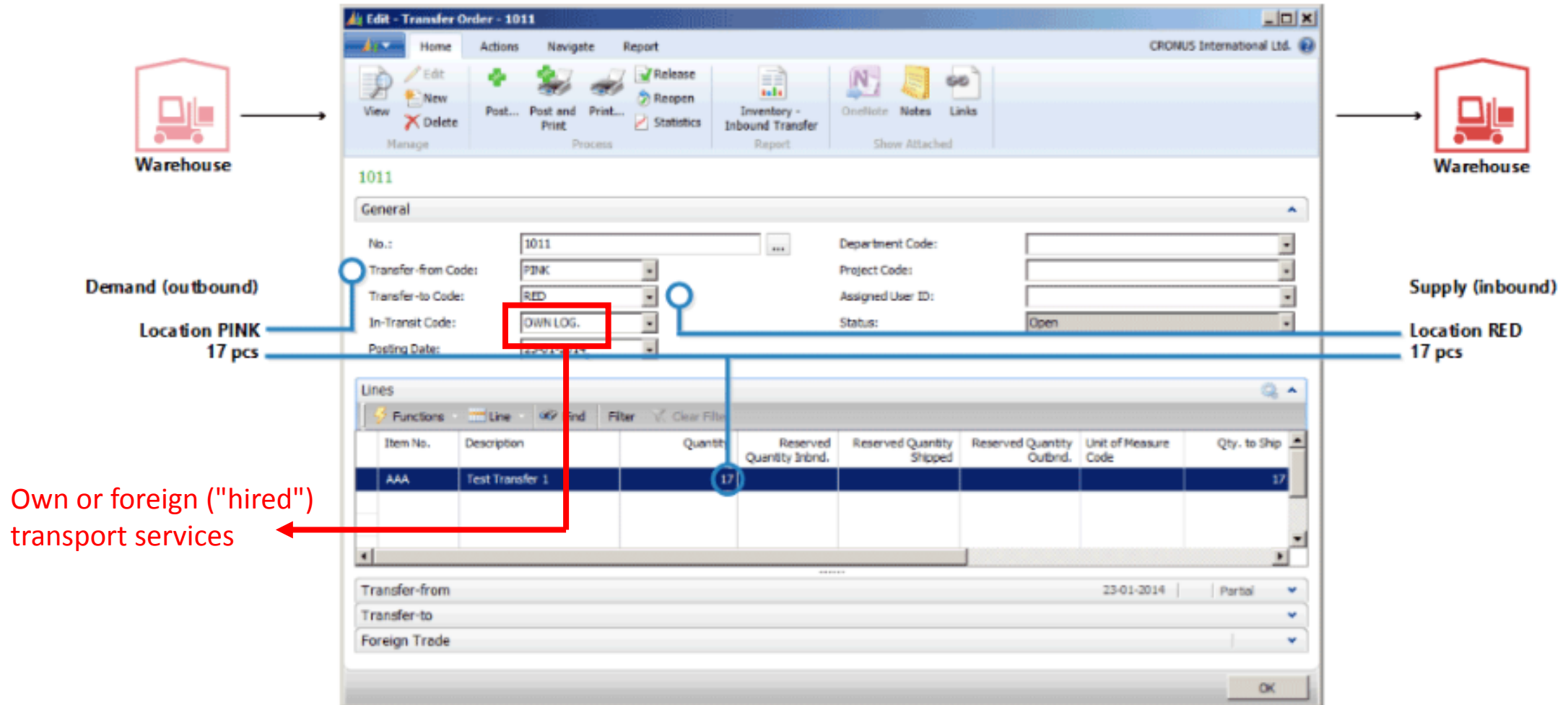
One fundamental aspect that makes transfers in planning different from purchase and production orders (these types of orders **represent stock replenishment** actions) is that a transfer line represents demand and supply at the same time.

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)



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

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.

The main distinction is the icons used to control operations

Shipment >

Transfer-from >

Transfer-to >

Warehouse >

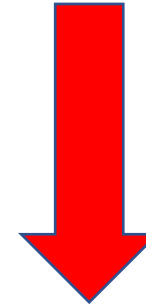
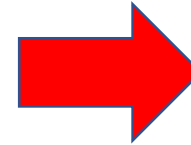
Foreign Trade >

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)

Search New Manage Process Report Navigate Open in Excel

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 Use As In-Transit

Name Blue Warehouse

Address & Contact Show more

Address	Contact
Address South East Street, 3	Contact Jeff Smith
Address 2	Phone No. +44-(0)20 8207 4533
Post Code B27 4KT ...	Email
City Birmingham ...	Home Page
Country/Region Code .. GB	

[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

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

Locations III – setup for location White (Advanced Warehouse Management)

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		
Receipt	Adjustment	
Receipt Bin Code	W-08-001	
Shipment	Cross-Dock	
Shipment Bin Code	W-09-001	
Production	Assembly	
Open Shop Floor Bin ...	W-07-001	
To-Production Bin Co...	W-07-002	
From-Production Bin ...	W-07-003	
	Adjustment Bin Code	W-11-001
	Cross-Dock Bin Code	W-14-001
	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"/>

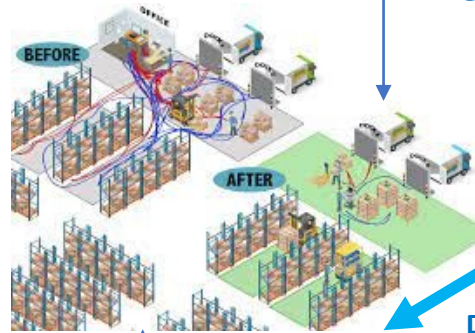
Bin numbers. The bins are the smallest area (position) of the warehouse.
Bins have several attributes (bin type, ranking, zone code, weight, volume, position)

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

Put-away & Picking from the stock



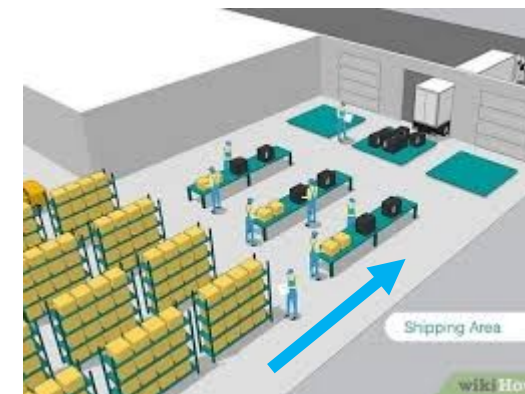
Receiving and inspection of goods



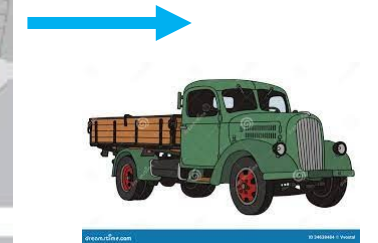
Put-away



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
W-0*

× Location Code !
WHITE

× Quantity
>0

× Item No.
L*

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

Graphical representation I.

Location could be hall, shed or assembly shop



Inventory zone



Bin

Times → Locations → Transfers

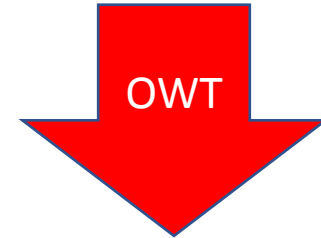
Blue location



Outsource/Own Location => Vehicle



Red location



Vendor Card | Work Date: 2/1/2022
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 Service

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 Show less

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

5 Days = 2D (Outbount WHT Blue)+1D (shipping time) + 2D (Inbount WHT Red)

WH = WareHouse HT=handling time

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	-
→ 1936-S	BERLIN Guest Chair, yellow	6
1952-W	OSLO Storage Unit/Shelf	-



Calculated field

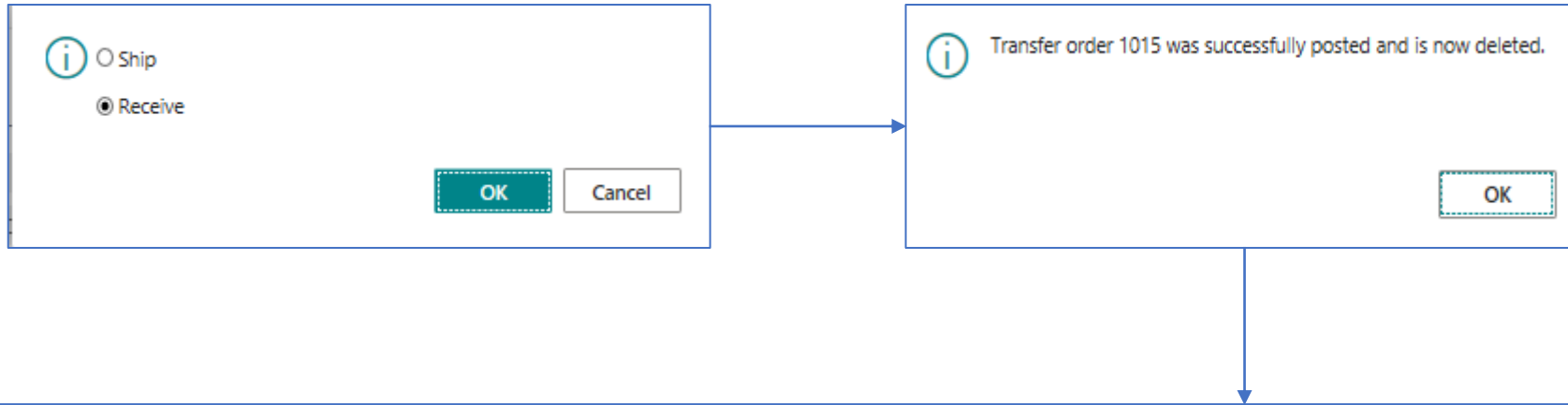
Item ledger entries (transactions) after 1st post action

← 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



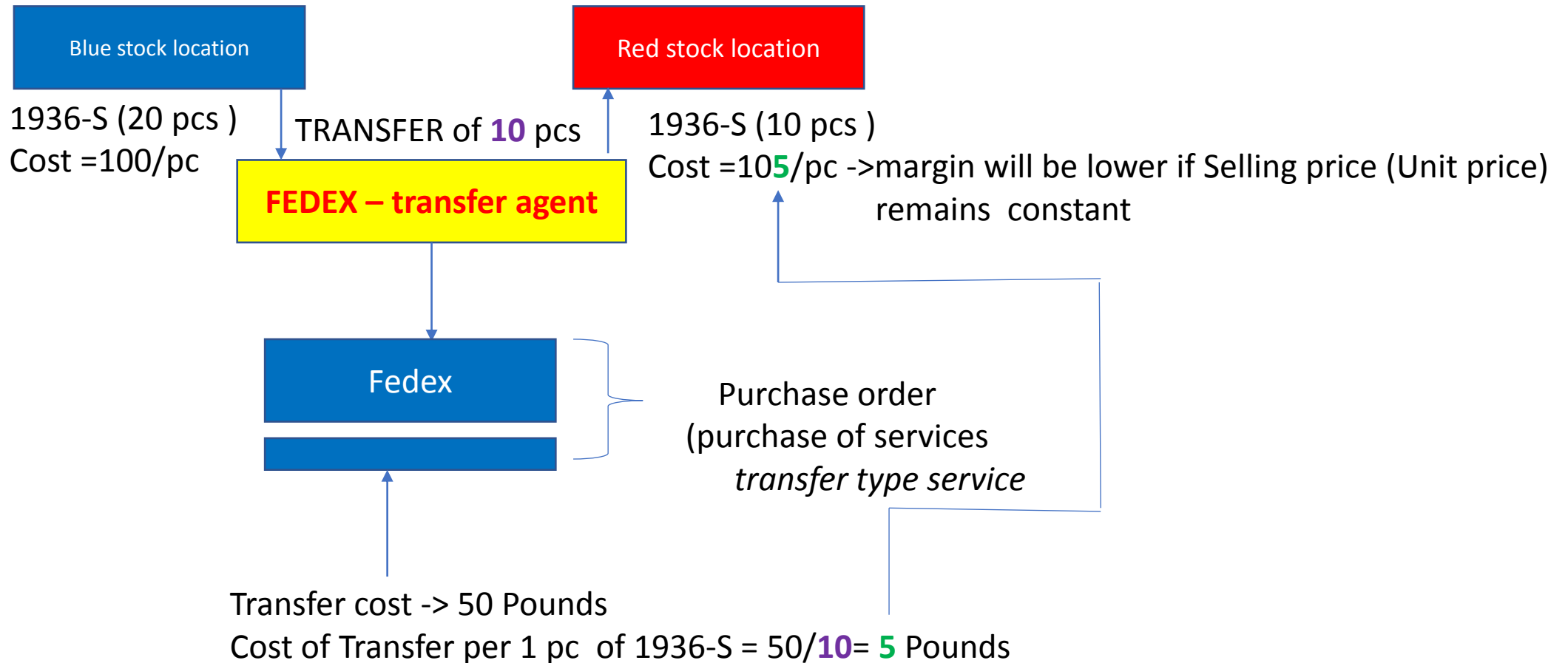
Item 1936-S BERLIN Guest Chair, yellow | Work Date: 2/1/2022

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)	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 of transfer)

Item number 1936-S Berlin Guest chair





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



THE END