

# **TRANSFER ORDER ENHANCEMENT**

*App For Microsoft Dynamics 365 – Business Central*

**AMJS CONSULTING**



The document outlines several enhancements to the "Transfer Order" feature within Microsoft Dynamics Business Central, designed to improve the user experience. These enhancements include workflow approval, automatic item reservation in transfer orders, management of orders with from and to dimensions, default setup of "direct transfer" on transfer routes, and default quantities for shipping and receiving. These improvements streamline the transfer process, providing a centralized platform for efficient and organized inventory management within the Dynamics Business Central environment.

### **Transfer Order Enhancement**

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[Vendor Bank Account Approval Workflow](#)

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# FEATURE HIGHLIGHTS

## TRANSFER LINE DETAILS FACTBOX

In the standard edition of Business Central, the Sales Line Details factbox provides comprehensive information about a specific sales line item. This includes details such as the item number, required quantity, and comprehensive availability details such as shipment date, item availability, available inventory, and various receipt and reservation statuses. However, this functionality is not available for transfer orders in the standard version. To address this limitation, we have integrated the same capabilities into the transfer order module, enabling efficient management and fulfillment of transfer orders with the same level of detailed insights as provided for sales orders.

Transfer Order 1013 Save

X The available inventory for item 1906-S is lower than the entered quantity at this location. [Show details](#) | [Don't show again](#)

Home Prepare Print/Send Order Actions Related Reports Automate Fewer options

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

---

**General** Show more

Transfer from Code: EAST In-Transfer Code:   
 Transfer to Code: WEST Posting Date: 5/26/2024   
 Direct Transfer:  Status: Open

Lines Manage Functions Line

[New Line](#) [Delete Line](#) [Select Items...](#)

Item No.	Description	Quantity	Reserved Quantity	Received Quantity	Reserved Quantity	Unit of Measure Code	Qty. to Ship	Quantity Shipped	Qty. to Receive
1906-S	Chaise dartyto MEXCCO. noire	1	--	--	--	PCS	1	--	1
1906-S	Socle mobile ATHENES	1	--	--	--	PCS	1	--	1

---

**Details** Attachments (0)

**Transfer Line Details**

Item No. 1906-S   
 Required Quantity 1

**Attachments**   
 Documents 0

**Availability**   
 Shipment Date 6/16/2024   
 Item Availability 48   
 Available Inventory 51   
 Scheduled Receipt 7   
 Reserved Receipt 0   
 Reserved Equipments 0   
 Reserved from stock None

**Item**   
 Unit of Measure Code PCS   
 Qty. per Unit of Measure 1

## ITEM TRANSFER BLOCKS

In the standard edition of Business Central, items can be designated as blocked for sales or blocked for purchase. However, this functionality was unavailable for Transfer Orders. We have now introduced the same capability to Transfer Orders, allowing users to block items from being included in transfers. This enhancement ensures consistency across different transaction types and provides greater control over inventory management processes.

The screenshot displays the 'Inventory' form for a Transfer Order. The 'Transfer Blocked' checkbox is highlighted with a red box. Below the form, the 'General' section shows transfer details, and the 'Lines' section contains a table with one line item. An error message is shown at the bottom of the lines table.

**Inventory** Show less

Shelf No.

Created From Catalog Item

**Transfer Blocked**

Search Description

Inventory

Qty. on Purch. Order

Qty. on Sales Order

Qty. on Project Order

Qty. on Assembly Order

Qty. on Asm. Component

Stockout Warning

Prevent Negative Inventory

Net Weight

Gross Weight

Unit Volume

Over-Receipt Code

Transfer Order 1013

Home Prepare Print/Send Order Actions Related Reports Automate Fewer options

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

● The page has an error. [Refresh \(F5\)](#) to undo the change, or correct the error.

**General** Show more

Transfer-from Code  In-Transit Code

Transfer-to Code  Posting Date

Direct Transfer  Status

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 Shipped	Qty. to Receive
1968-S	Chaise dactylo MEXICO. noire	1	--	--	--	PCS	1	--	1
1906-S									

● You cannot transfer item 1906-S because the Transfer Blocked check box is selected on the item card.

## DEFAULT TRANSFER QUANTITY

In the standard edition of Business Central, Transfer Orders lack the configurable options present in Sales and Purchases, such as setting default quantities and preventing automatic filling of Quantity to Ship and Quantity to Receive fields. Notably, Transfer Orders do not offer the ability to set a default quantity of 1 for items. Our recent updates address these limitations, bringing Transfer Orders in line with Sales and Purchases by offering customizable controls and enhancing flexibility in inventory management.

Inventory Setup

General Posting Journal Templates More options

General >

Location >

Transfer

Reserve ..... Never

Skip Manual Reservation .....

Default Item Quantity .....

Default Quantity to Ship ..... Remainder

Default Quantity to Receive ..... Remainder

- ❖ **Default Item Quantity:** Specifies that the Quantity field is set to 1 when you fill in the Item No. field.
- ❖ **Default Quantity to Ship:** Specifies the default value that is inserted in the Qty. to Ship field on transfer order lines.
- ❖ **Default Quantity to Receive:** Specifies the default value that is inserted in the Qty. to Ship field on transfer order lines.

## AUTO RESERVE ITEM

In the standard version of Business Central, automatic quantity reservation is performed for sales orders but not for Transfer Orders. This operation needs to be manually performed. Our functionality now enables automatic reservation at the Transfer Order level. This prevents conflicts with other processes by ensuring that the necessary items and quantities are automatically reserved.

### Setup reservation policies on items

The Reserve field on the item card provides the option to configure reservation policies for specific items. By default, it is set to Optional, allowing users to reserve the item on transfer order using a dedicated action on the sales line page or through the reservation worksheet, as detailed later in this post.

Planning Show less

Reordering Policy	<input type="text"/>	Reorder-Point Parameters	
Reserve	Optional	Reorder Point	15
Order Tracking Policy	None	Reorder Quantity	0
Stockkeeping Unit Exists	No	Maximum Inventory	0
Dampener Period	<input type="text"/>	Overflow Level	0

### Setup reservation policies for Transfer Order

The Reservation field in the inventory setup operates in a similar manner to the one on the item card. When these two fields are combined, they establish the reservation policy for transfer order lines.

Inventory Setup

General Posting Journal Templates More options

General >

Location >

Transfer

Reserve	Never	Default Quantity to Ship	Remainder
Skip Manual Reservation	<input checked="" type="checkbox"/>	Default Quantity to Receive	Remainder
Default Item Quantity	<input checked="" type="checkbox"/>		

The table below demonstrates how the values of both fields impact the reservation policy:

Reserve Field Inv. Setup	Reserve Field Item Card	Reserv. On Transfer Lines
Always	Always	Automatic
Always	Optional	Automatic
Always	Never	Cannot reserve
Optional	Always	Automatic
Optional	Optional	Manual Reservation
Optional	Never	Never
Never	Always	Never
Never	Optional	Never
Never	Never	Never

**ⓘ Note**

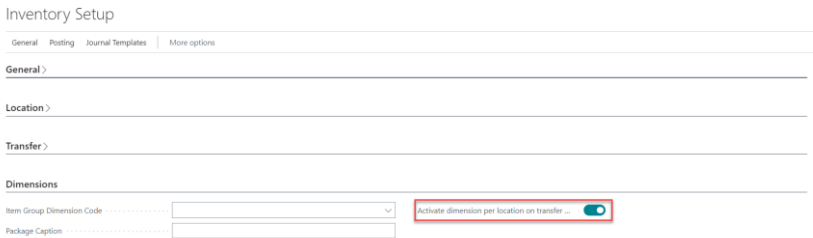
**Skip Manual Reservation:** When activated, this feature prevents the display of reservation confirmation messages for transfer lines that are not fully automatically reserved.



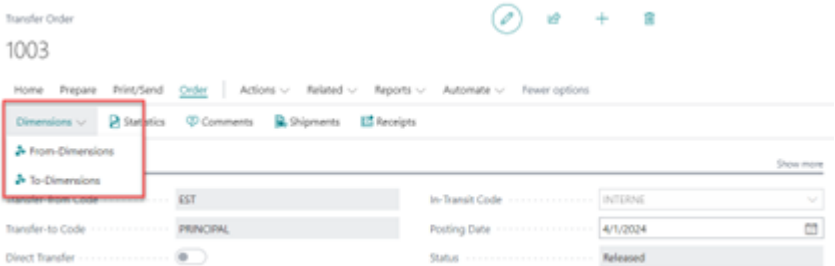
## MULTI DIMENSIONS

Dimensions act as identifiers, categorizing entries for tracking and analysis through various reporting tools. They can signify aspects like department or project affiliation. In the standard version, due to the involvement of multiple locations in transfer order documents, the order of data entry becomes critical. Default dimensions are replicated from the last location field (with the In-Transit Location being excluded). [Microsoft Learn](#)

With our enhancement, Transfer Orders now facilitate the transfer of location dimensions from the originating to the destination location. This guarantees that dimension information accurately represents both the origin and destination locations in Item Ledger Entries, Value Entries, and GL Entries, offering a comprehensive perspective of inventory movement between various locations.



- ❖ **Activate dimension per location on transfer:** When enabled, users will have the capability to define two distinct dimensions on transfer orders: the "From-Dimension" and the "To-Dimension."



The following examples demonstrate how the dimension will be applied, illustrating both the from-dimension and to-dimension.

You have the following setup:

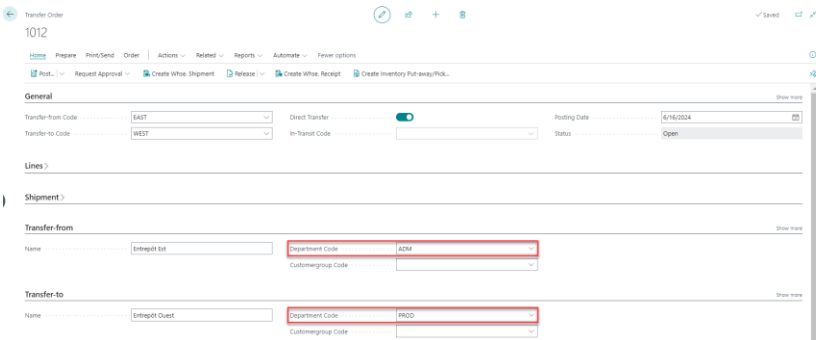
- Location EST: Department dimension is ADM
- Location WEST: Department dimension is PROD

You specify the location on a transfer order as follows

- 1- From Location: EAST
- 2- To Location: WEST

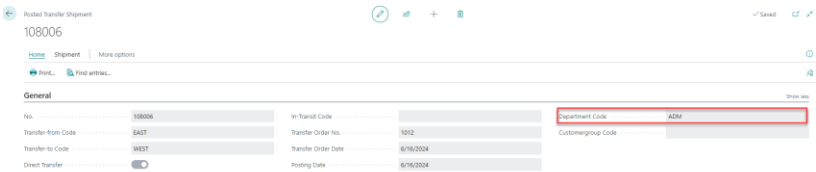
⇒ The ADM dimension will be copied from location EAST to (From-Dimension)

⇒ The PROD dimension will be copied from location WEST to (To-Dimension)

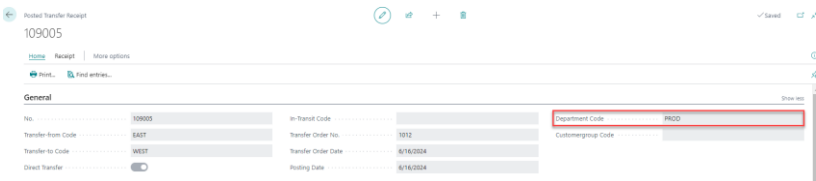


In the posted document and ledger entries, the result will be as follows:

- The ADM dimension will be copied to “Posted Transfer Shipment”



- The PROD dimension will be copied to “Posted Transfer Receipt”



- Corresponding ledger entries will show the ADM dimension for all transaction related to from-location (EAST)
- Corresponding ledger entries will show the PROD dimension for all transaction related to to-location (WEST)

Item Ledger Entries

Posting Date	Entry Type	Document Type †	Document No. †	Order Type	Order No.	Item No.	Department Code	Customergro... Code	Location Code	Quantity
6/16/2024	Transfer	Transfer Shipment	108006	Transfer	1012	1968-S	ADM		EAST	-1
6/16/2024	Transfer	Transfer Shipment	108006	Transfer	1012	1968-S	ADM			1
6/16/2024	Transfer	Transfer Receipt	109005	Transfer	1012	1968-S	PROD			-1
6/16/2024	Transfer	Transfer Receipt	109005	Transfer	1012	1968-S	PROD		WEST	1

General Ledger Entries

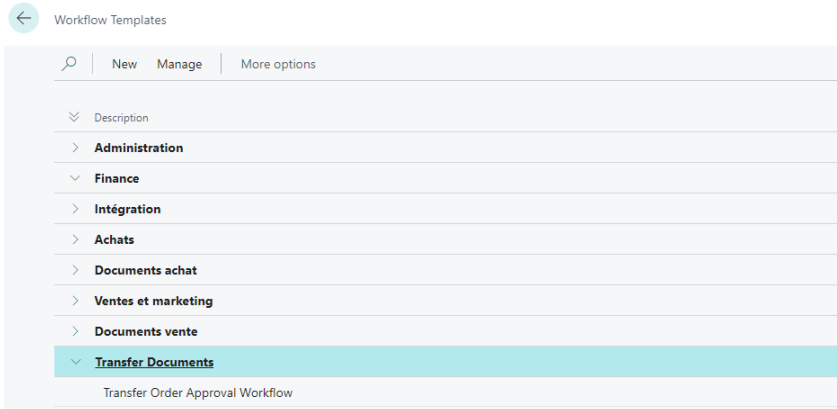
Posting Date †	Document Type	Document No. †	G/L Account No.	Description	Department Code	Customergro... Code	Gen. Posting Type	Gen. Bus. Posting Group
6/16/2024		108006	320000	Direct Cost on 06/16/24	ADM			
6/16/2024		108006	603710	Direct Cost on 06/16/24	ADM			
6/16/2024		108006	370000	Direct Cost on 06/16/24	ADM			
6/16/2024		108006	603710	Direct Cost on 06/16/24	ADM			
6/16/2024		109005	370000	Direct Cost on 06/16/24	PROD			
6/16/2024		109005	603710	Direct Cost on 06/16/24	PROD			
6/16/2024		109005	370000	Direct Cost on 06/16/24	PROD			
6/16/2024		109005	603710	Direct Cost on 06/16/24	PROD			

## APPROVAL WORKFLOW

Approval workflows in Microsoft Dynamics 365 Business Central are vital for automating and streamlining business processes. Users can create custom workflows or use predefined templates to match specific needs, such as vendor payment approvals or customer credit limit exceedances. These workflows enable notifications, document holds, and approvals from designated individuals. However, in the standard version, there is no feature for setting up approval workflows for transfer orders. With our application, businesses can seamlessly implement approval workflows for transfer orders, offering enhanced control and efficiency in managing inventory transfers. Overall, these tailored workflows enhance operational efficiency, support decision-making, and ensure consistent, structured management of business activities.

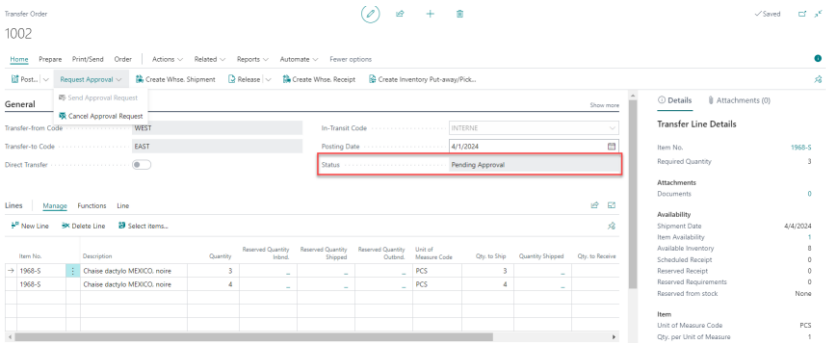
### Workflow Templates

You can automate the process of approving new or changed transfer order, by enabling the **Transfer Order Approval workflow**.



## Workflow Process

With our application, businesses can seamlessly implement approval workflows for transfer orders, ensuring a smooth and structured process similar to standard Business Central approval workflows for sales or purchase orders.



## Workflow notification

Email notifications within Business Central's approval workflows are designed to promptly inform users when their action is required. These notifications are triggered when an event necessitating their response occurs, such as the need for an approver to review a newly requested record.

Hello ,

You are registered to receive notifications related to CRONUS International Ltd.  
This is a message to notify you that:

[Transfer Header 1005 requires your approval.](#)

Transfer-from Green Warehouse  
Transfer-to White Warehouse  
Details Created ByADMIN

Approval Due Date 16/06/24  
[Transfer Header 1005](#) (Custom Link)

Notification messages are sent automatically and cannot be replied to. But you can change when and how you receive notifications: [Notification Settings](#) (Windows Client)

# PRICING

<b>Offer</b>	<b>Included Features</b>	<b>Price (User)</b>
Basic	Workflow Approval (*)	\$1/year
Premium	All Basic Offer Features	\$17/Month
	Email notification layout for workflow approval	
	Transfer Line Details FactBox	\$197/Year
	Item Transfer Block	
	Default Transfer Quantity	
	Auto reserve Item	
Multi Dimension		

(\*) The layout of email notification is not included



**Your ideas matter to us! If you have innovative concepts or suggestions for our Transfer Order Enhancement app, we'd love to hear from you. Submit your ideas effortlessly by sending us an email at [idea.tr@amjs-consulting.com](mailto:idea.tr@amjs-consulting.com)**

**We appreciate your input and look forward to considering your ideas to enhance our Transfer Order Enhancement App. Thank you for being a part of our innovation journey!**