

Simple scenario (Item Transfer) ERP Microsoft Dynamics NAV 2018w1

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Date : 9.10.2019
For : MPH_AOMA and AOPR and BPH_EPS1
Database : MS Dynamics NAV 2016 W1
Keys : Ctrl-N=New, F4=Look-up, Ctrl-F7=entries, F7=statistics, F9=post
Shorthands : G/L General Ledger, TO-Transfer Order
Tutor-TU

Go to Menu **Warehouse->** (working space)->**Administration-> Setup> Locations**
Select Locations = White and at the top of the window select **Manage** and **View** icon
Open card Location=White and see all the tabs of this card.

See icon **Bins**. Open it, and you will see:

Code	Description	E...	Dedi...
W-01-0001		<input type="checkbox"/>	<input type="checkbox"/>
W-01-0002		<input checked="" type="checkbox"/>	<input type="checkbox"/>
W-01-0003		<input checked="" type="checkbox"/>	<input type="checkbox"/>
W-02-0001		<input type="checkbox"/>	<input type="checkbox"/>
W-02-0002		<input checked="" type="checkbox"/>	<input type="checkbox"/>

See bin contents by use of icon **Contents**

Bin Code	Fixed	De...	Dedi...	Item No.	Quantity	Quantity (Base)
W-01-0001	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	LS-75	4	4

The bin is the smallest possible storage location. Limits, Empty and Assigned -> TU, Zones will show you again

Go back by ESC key (klik several times)

Select Locations=**Blue** and **Edit**-> see Warehouse tab and Inbound and Outbound

Warehouse

Require Receive: Default Bin Selection:

Require Shipment: Outbound Whse. Handling Time:

Require Put-away: Inbound Whse. Handling Time:

Use Put-away Worksheet: Base Calendar Code:

Require Pick: Customized Calendar:

Bin Mandatory: Use Cross-Docking:

Directed Put-away and Pick: Cross-Dock Due Date Calc.:

Use ADCS:

times

Do the same action for chosen inventory Location=**Red**. Inbound handling time =1D

Warehouse

Require Receive: Default Bin Selection:

Require Shipment: Outbound Whse. Handling Time:

Require Put-away: Inbound Whse. Handling Time:

Use Put-away Worksheet: Base Calendar Code:

Require Pick: Customized Calendar:

Bin Mandatory: Use Cross-Docking:

Directed Put-away and Pick: Cross-Dock Due Date Calc.:

Use ADCS:

Outbound handling time =2D.If in your current database you may have different values,so you must rewrite it.

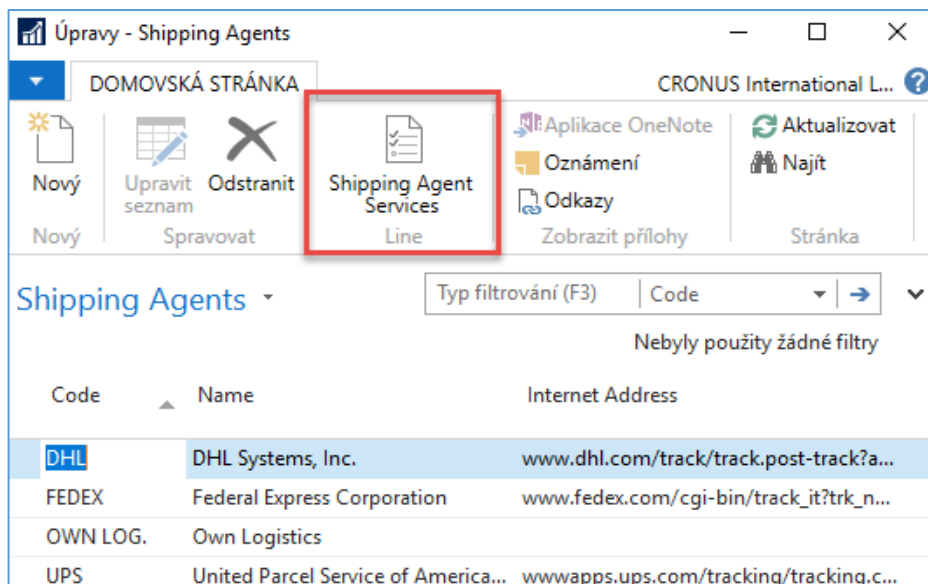
Menu **Warehouse**-> **Administration**-> **Inventory**-> **Transfer Routes**

Transfer Routes Matrix ▾

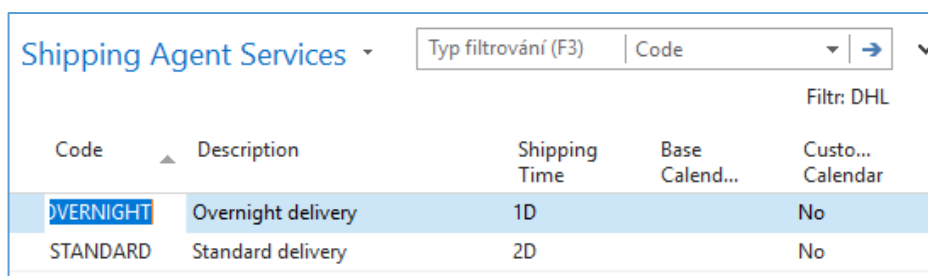
Trans... Code	Transfer-from Name	BLUE	GREEN	RED	SILVER	WHITE	YELLOW
BLUE	Blue Warehouse			OUT. LOG.		OWN LOG.	OUT. LOG.
GREEN	Green Warehouse			OWN LOG.		OWN LOG.	OWN LOG.
RED	Red Warehouse	OUT. LOG.					
SILVER	Silver Warehouse						
WHITE	White Warehouse			OWN LOG.			
YELLOW	Yellow Warehouse						

You will get this matrix window

Go to searching windows and find **Shipping agents** area



Use icon **Shipping Agent Services**



Go to the searching window and enter string **Transfer Orders** or use Menu **Warehouse-> Orders & Contacts-> Lists->Transfer Orders**

For an explanation of principles, see PWP Presentation about Transfers

No.	Transfer... Code	Transfer-to Code	In-Transit Code	Status	Assigned User ID	Receipt Date	Shipment Date
1002	BLUE	YELLOW	OUT. LOG.	Released		27.01.2019	24.01.2019
1004	BLUE	WHITE	OWN LOG.	Released		27.01.2019	25.01.2019

Ctrl-N → Create a new Transfer Order - confirm with key Enter from the screen below

Add by F4 values of Location From and To. In our case, it will be **Blue** and **Red**

In transit, the chosen lorry comes from the Transfer Routes matrix.

General														
No.:	1012	...	Department Code:											
Transfer-from Code:	BLUE		Project Code:											
Transfer-to Code:	RED		Assigned User ID:											
In-Transit Code:	OUT. LOG.		Status:	Open										
Posting Date:	01.02.2019													

Lines													
Item No.	Description	Quantity	Reserved Quantit...	Reserved Quantit...	Reserved Quantit...	Unit of Measur...	Qty. to Ship	Quantity Shipped	Qty. to Receive	Quantity Received	Shipment Date	Receipt Date	Appl.-to Item Entry
1936-S	BERLIN Guest Chair, yellow	1				PCS	1				01.02.2019	05.02.2019	0

Enter Item-1936-S (Berlin chair) and one pcs.

On the tab Transfer From you will see

Transfer-from	
Transfer-from Name:	Blue Warehouse
Transfer-from Name 2:	
Transfer-from Address:	South East Street, 3
Transfer-from Address 2:	
Transfer-from Post Code:	B27 4KT
Transfer-from City:	Birmingham
Transfer-from Contact:	Jeff Smith
Shipment Date:	01.02.2019
Outbound Whse. Handling Time:	2D
Shipment Method Code:	
Shipping Agent Code:	FEDEX
Shipping Agent Service Code:	NEXT DAY
Shipping Time:	1D
Shipping Advice:	Partial

Transfer-to	
Transfer-to Name:	Red Warehouse
Transfer-to Name 2:	
Transfer-to Address:	Main Ashford Street, 2
Transfer-to Address 2:	
Transfer-to Post Code:	TN27 6YD
Transfer-to City:	Ashford
Transfer-to Contact:	Carole Poland
Receipt Date:	05.02.2019
Inbound Whse. Handling Time:	1D

On the tab Transfer To you will see

Shipping date=1.2.2019 and Receipt date= 5.2.2019 ->4 days. Two days outbound warehouse handling time + 1 day shipping time + 1-day inbound warehouse handling time. It might be possible that in your current NAV2018w1 database you will have (you will use) different dates.

Post **TO** (transfer order) by **F9**

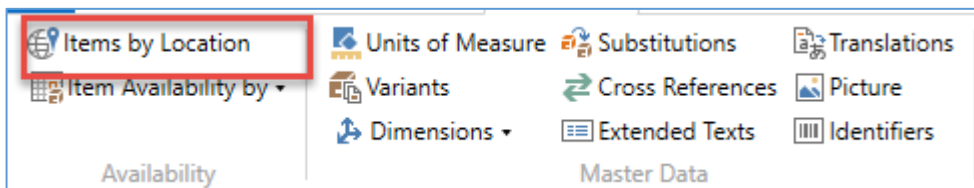
Microsoft Dynamics NAV

Ship
 Receive

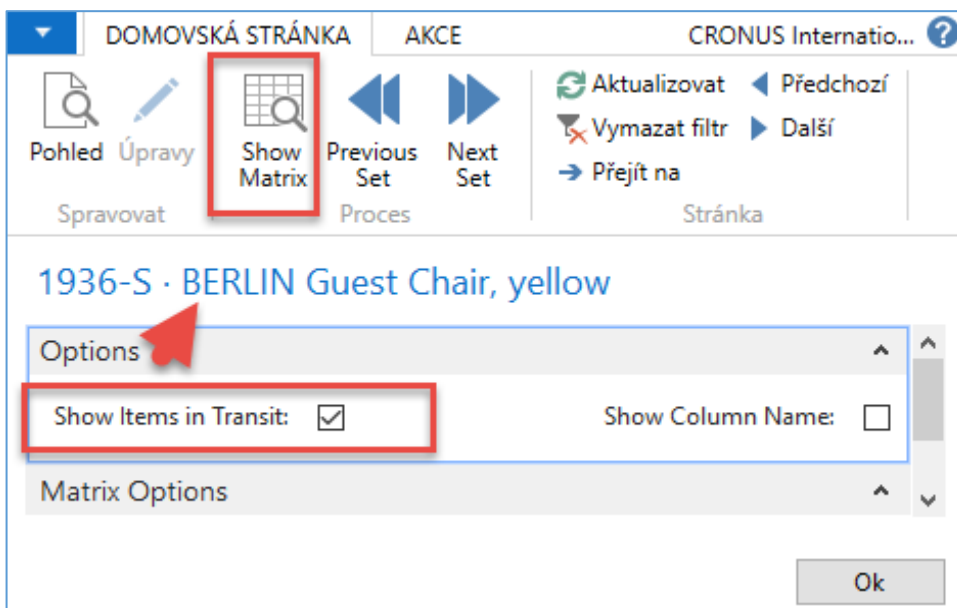
Item No.	Description	Quantity	Reserved Quantit...	Reserved Quantit...	Reserved Quantit...	Unit of Measur...	Qty. to Ship	Quantity Shipped	Qty. to Receive	Quantity Received	Shipment Date	Receipt Date
1936-S	BERLIN Guest Chair, yellow	1				PCS		1	1		01.02.2019	05.02.2019

And **TO** line changed :

Before posting **TO** for the second time see please matrix item by location from item card or item list by using Icon



and



You will get this type of screen

Items by Location Matrix ▾


No.	Description	OUT. LOG.	OWN LOG.
1920-S	ANTWERP Conference Table		
1924-W	CHAMONIX Base Storage U		
1928-S	AMSTERDAM Lamp		
1928-W	ST.MORITZ Storage Unit/Dr...		
1936-S	BERLIN Guest Chair, yellow	4	
1952-W	OSLO Storage Unit/Shelf		
1960-S	ROME Guest Chair, green		
1964-S	TOKYO Guest Chair, blue		25

Click on a number to see transfer moves

Post TO 2nd time by **F9**

You will get

Microsoft Dynamics NAV ✕

 Ship

Receive

Item Ledger Entries ▾

Zobrazit výsledky:

✕ Kde Item No. ▾ je 1936-S
✕ A Posting Date ▾ je 01.02.19
✕ A Entry Type ▾ je Transfer ▾

+ Přidat filtr

Posting Date	Entry Type	Document Type	Document No.	Item No.	Desc...	Location Code	Qua...	Invoiced Quantity	Remaining Quantity	Sales Amount (Actual)	Cost Amount (Actual)	Cost Amount (Non-Invtbl.)	Open	Order Ty
01.02.2019	Transfer	Transfer Shi...	108007	1936-S	BLUE		-1	-1	0	0,00	-97,50	0,00	<input type="checkbox"/>	Transfer
01.02.2019	Transfer	Transfer Shi...	108007	1936-S	OUT. LOG.		1	1	0	0,00	97,50	0,00	<input type="checkbox"/>	Transfer
01.02.2019	Transfer	Transfer Rec...	109004	1936-S	OUT. LOG.		-1	-1	0	0,00	-97,50	0,00	<input type="checkbox"/>	Transfer
01.02.2019	Transfer	Transfer Rec...	109004	1936-S	RED		1	1	1	0,00	97,50	0,00	<input checked="" type="checkbox"/>	Transfer

And see Item entry of chosen item **1936-S**