



# Create Agency to Agency Transfer Order

## Description

Use this task to create an agency to agency transfer order. This transfer order is created in the Vendor portal to move items from one agency to another.

## Trigger

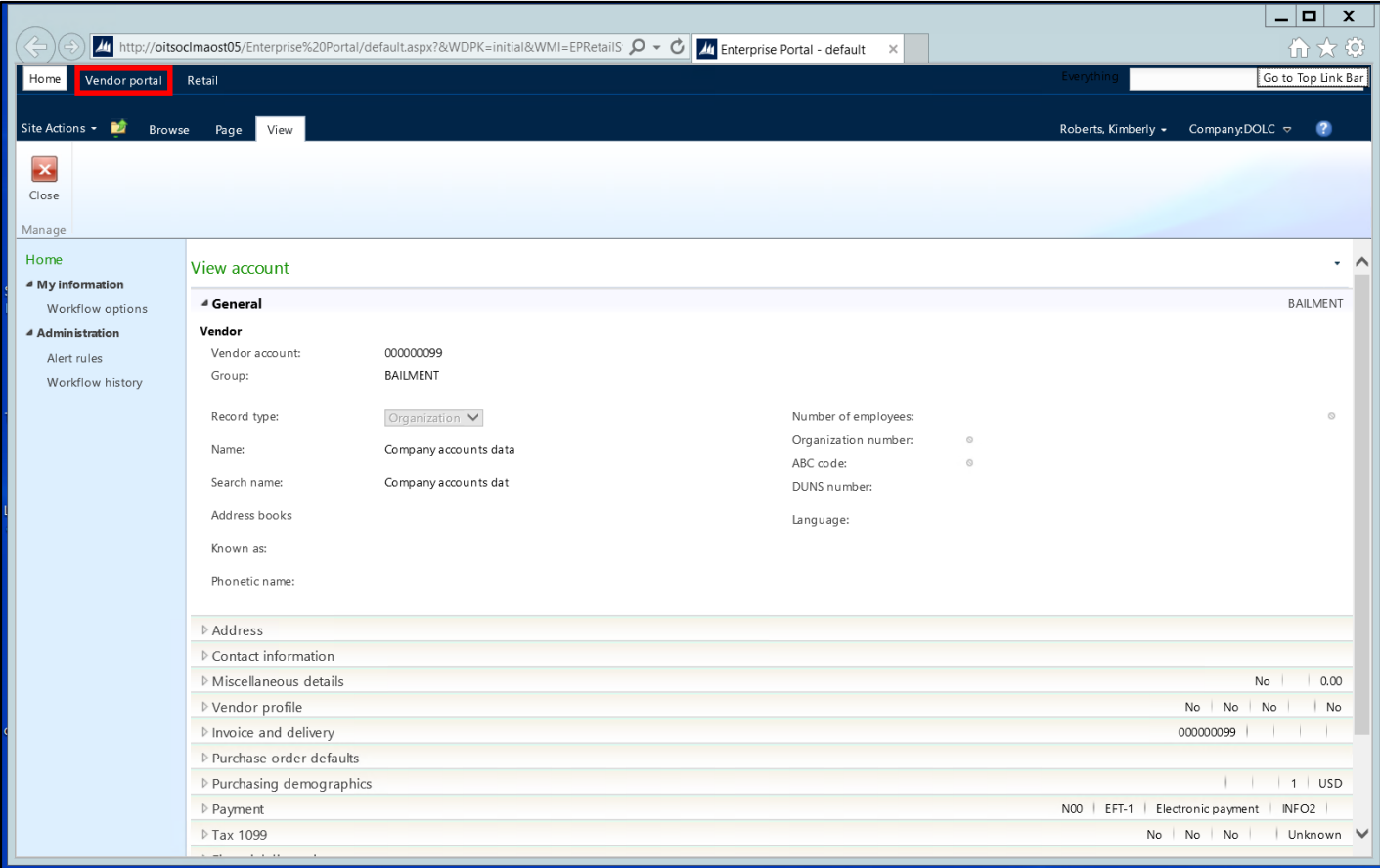
Perform this task when there is a need to move inventory from one agency to another.

## Prerequisites

The vendor/broker has determined the from and to agencies, and the items and quantities by confirming the inventories at both agencies.

# Procedure

1. Begin this task by logging into the portal.
2. Click **Vendor portal** on the toolbar.



3. Click **Transfer orders** in the Vendor portal panel.

The screenshot shows a web browser window with the URL `http://oitsocmaost05/VendorPortal/Enterprise%20Portal/default.aspx?WMI=VendProfileE`. The page title is "Profile - Vendor account: 00...". The navigation bar includes "Home", "Vendor portal", and "Retail". The main content area displays the "Vendor portal" for "BACARDI USA INC" with account number "00000099".

**Vendor portal**  
Profile - Vendor account: 00000099, BACARDI USA INC

**Company information** USD

Name: BACARDI USA INC  
Language: en-us  
Currency: USD  
Address: 2701 LE JEUNE RD  
Miami, FL 33134

**Contacts**

Name	E-mail	Telephone	Job title	Manager
This grid is empty.				

**Vendor portal** sidebar menu:

- Common
  - Profile
  - Contacts
  - Supplied products
  - Notifications
  - Price simulator
  - Transfer orders** (highlighted in red)
- Reports
  - Vendor reports

4. Click  to create a new transfer order.

Vendor portal

Common

- Profile
- Contacts
- Supplied products
- Notifications
- Price simulator
- Transfer orders


Reports

- Vendor reports

Transfer number	From	To	Ship date	Created date and time	Receipt date	Mode of delivery	Order status	State
This grid is empty.								


  

Line number	Item number	Product name	Transfer quantity	Original Qty	Inventory unit
This grid is empty.					

5. Click  in the **From** field and select the desired agency number from the drop-down list. This is the agency shipping the items. In this example, select “10100”.




The agency number can also be entered directly into the **From** field.


6. Click  in the **To** field and select the desired agency number from the drop-down list. This is the agency the items are being shipped to. In this example, select “10101”.



The agency number can also be entered directly into the **To** field.

7. Click  in the **Mode of Delivery** field and select the desired mode of delivery. In this example, select “Courier”.

8. Click  to add items.



The screenshot shows a window titled "New transfer order - Transfer number: TO000002801, 6/8/2017". The window contains the following fields and controls:

- Transfer number: TO000002801
- From: \* 10100 (dropdown menu)
- To: \* 10101 (dropdown menu)
- Mode of delivery: COURIER (dropdown menu with a close button 'x')
- Buttons: Create (highlighted with a red box) and Close

9. Click  under the **Transfer order lines** section to select items for transfer.

Transfer order

Page Edit

Save and close Close

Commit

Transfer Order Approval Process Submit

**Transfer order header**

Transfer number: TO000002801 From: 10100

Created date and time: 6/8/2017 11:26:56 AM Transit: 10100T

Order status: Created To: 10101

State: Not submitted Mode of delivery: COURIER

**Transfer order lines**

Add items Remove Cancel

Type to filter Line number


Line number	Item number	Product name	Transfer quantity	Original Qty	Inventory unit
This grid is empty.					

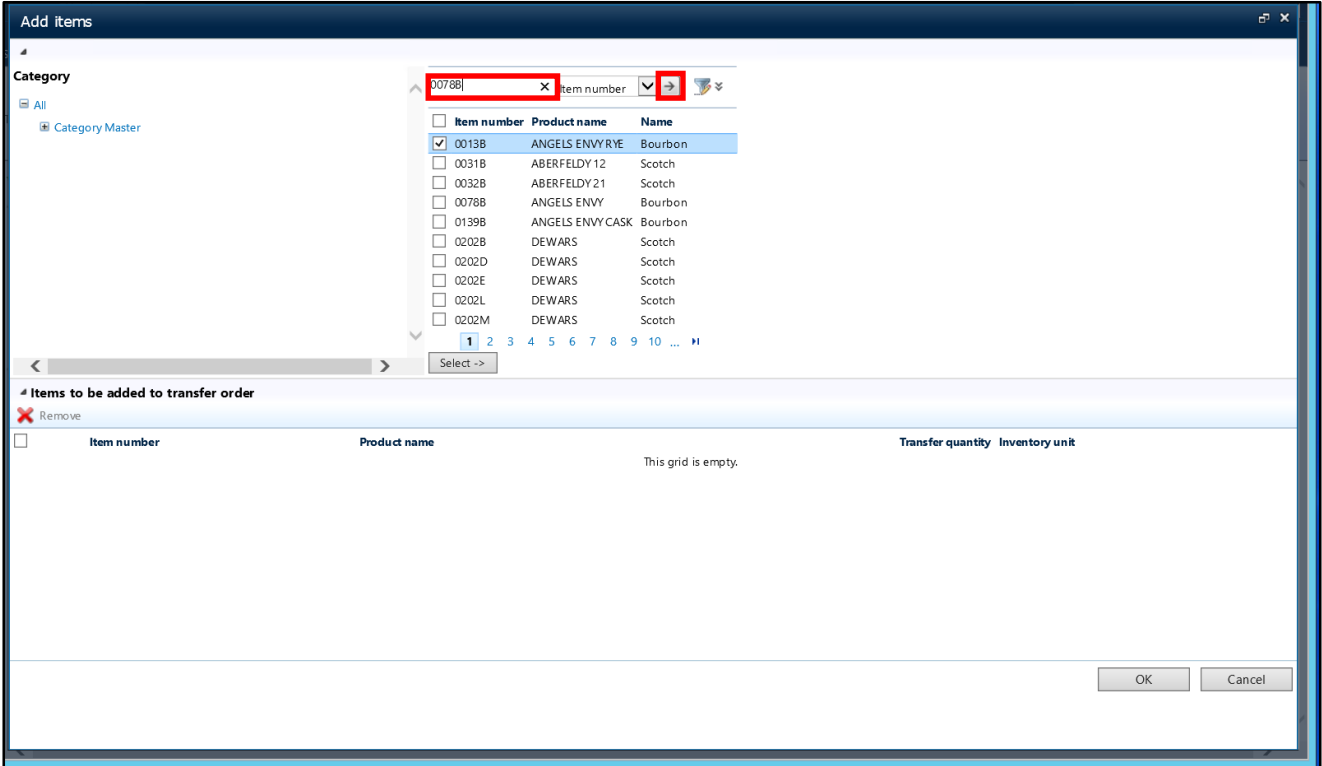
Save and close Close

10. Enter the item number in the **Item number** field. In this example, enter “0078B”.



The item can also be selected from the displayed list.

11. Click  to filter on the entered item number.



**Add items**

Category: All, Category Master

Search: 0078B | Item number | Filter

Item number	Product name	Name
<input checked="" type="checkbox"/>	0013B ANGELS ENVY RYE	Bourbon
<input type="checkbox"/>	0031B ABERFELDY 12	Scotch
<input type="checkbox"/>	0032B ABERFELDY 21	Scotch
<input type="checkbox"/>	0078B ANGELS ENVY	Bourbon
<input type="checkbox"/>	0139B ANGELS ENVY CASK	Bourbon
<input type="checkbox"/>	0202B DEWARS	Scotch
<input type="checkbox"/>	0202D DEWARS	Scotch
<input type="checkbox"/>	0202E DEWARS	Scotch
<input type="checkbox"/>	0202L DEWARS	Scotch
<input type="checkbox"/>	0202M DEWARS	Scotch

1 2 3 4 5 6 7 8 9 10 ... H

Select ->

**Items to be added to transfer order**

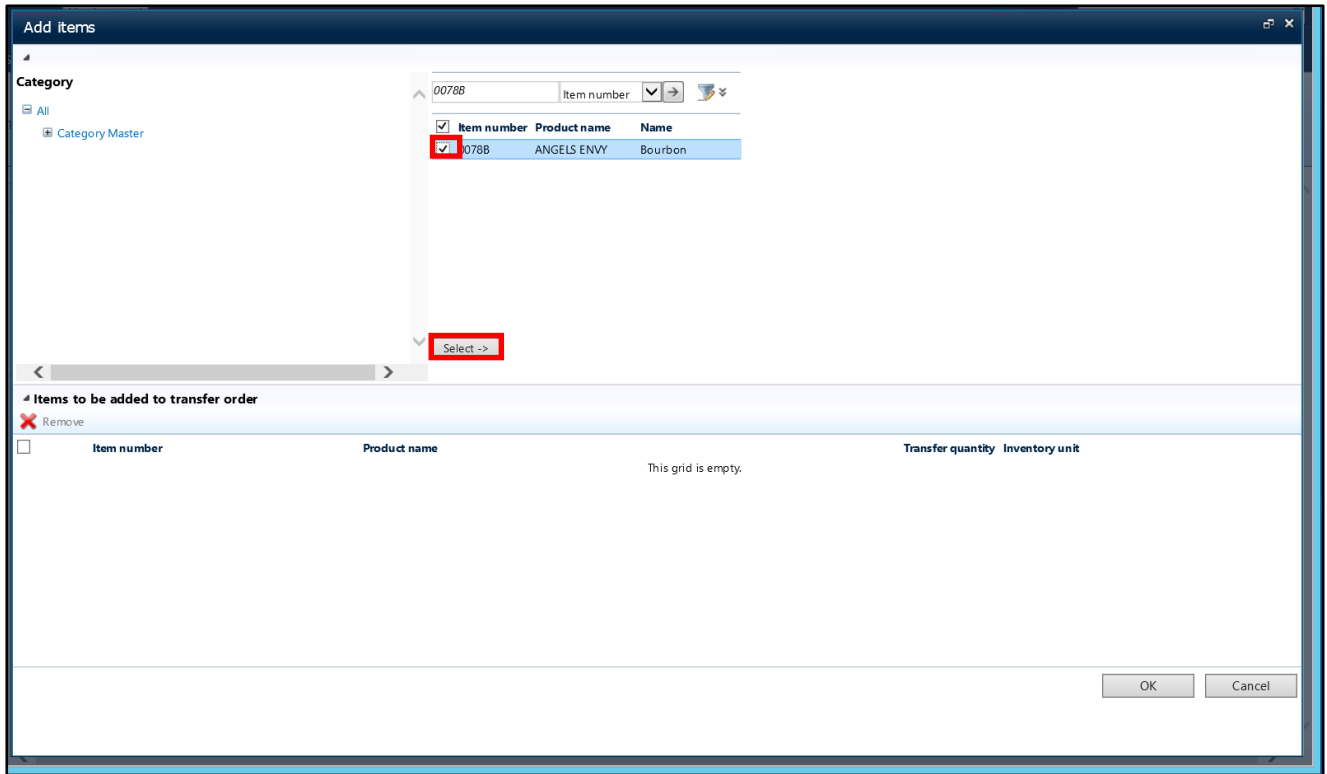
Remove

Item number	Product name	Transfer quantity	Inventory unit
This grid is empty.			

OK Cancel

12. Select  to the left of the desired **item number**.

13. Click  to bring the selected item into the item grid,





14. Update the default entry in the **Transfer quantity** field to reflect the quantity of bottles to be transferred. In this example, enter “18.00.”



The default quantity in this field is bottles per case.

The screenshot shows the 'Add Items' dialog box. At the top, there is a search bar with '0078B' entered. Below the search bar, a list of items is shown with columns for 'Item number', 'Product name', and 'Name'. The item '0078B ANGELS ENVY Bourbon' is selected. Below this, there is a section titled '# Items to be added to transfer order' with a 'Remove' button. A table below this section lists the items to be added. The table has columns for 'Item number', 'Product name', 'Transfer quantity', and 'Inventory unit'. The row for '0078B ANGELS ENVY' has '18.00' entered in the 'Transfer quantity' field, which is highlighted with a red box. At the bottom right, there are 'OK' and 'Cancel' buttons.

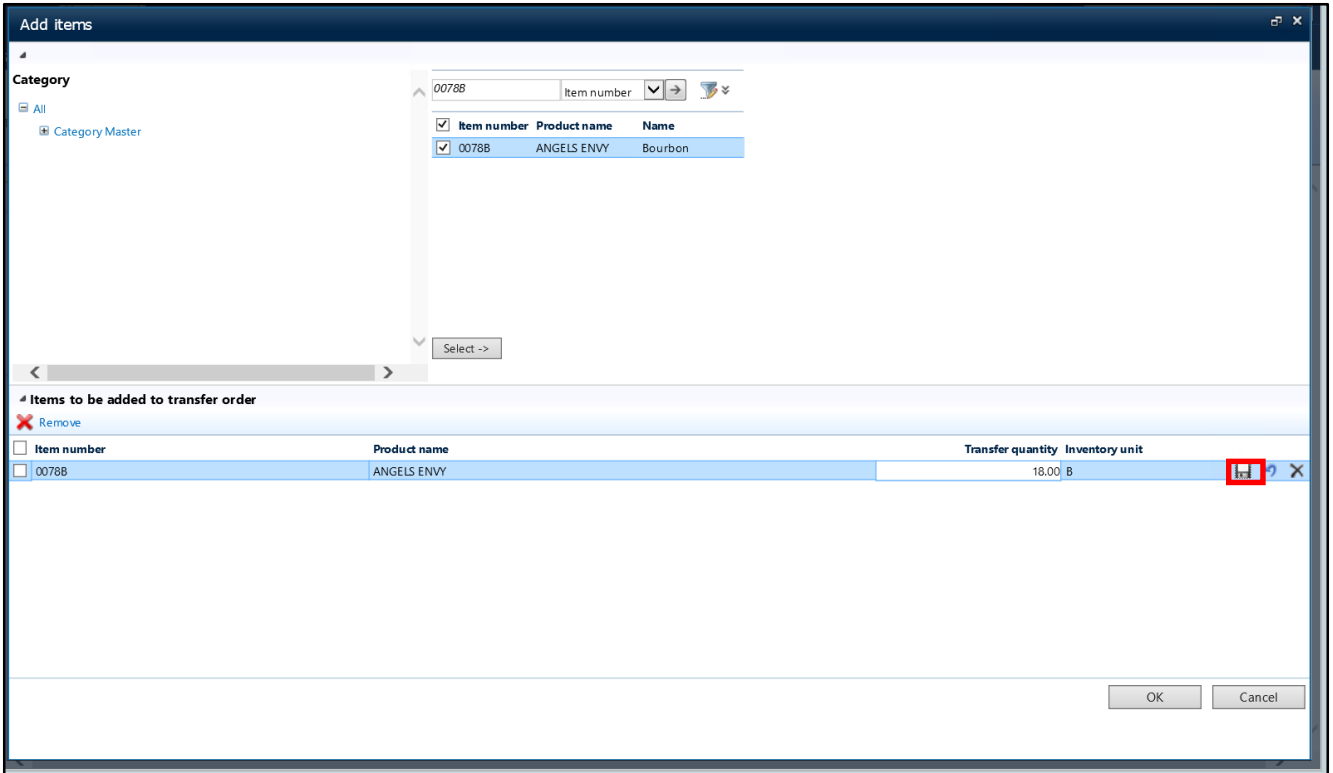
Item number	Product name	Transfer quantity	Inventory unit
<input type="checkbox"/> 0078B	ANGELS ENVY	18.00	B

15. Press "Tab" on the keyboard.

16. Click  to update the line item.



Once updated, the entire line will turn blue.



**Add items**

Category: All, Category Master

Item number: 0078B

Item number	Product name	Name
0078B	ANGELS ENVY	Bourbon

Select ->

**Items to be added to transfer order**

Remove

Item number	Product name	Transfer quantity	Inventory unit
0078B	ANGELS ENVY	18.00	B

OK Cancel

17. Click  .



To enter additional items, follow Steps 10 - 17.

**Add items**

**Category**

All

- Category Master

00788 Item number

<input checked="" type="checkbox"/>	Item number	Product name	Name
<input checked="" type="checkbox"/>	00788	ANGELS ENVY	Bourbon


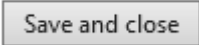
Select ->

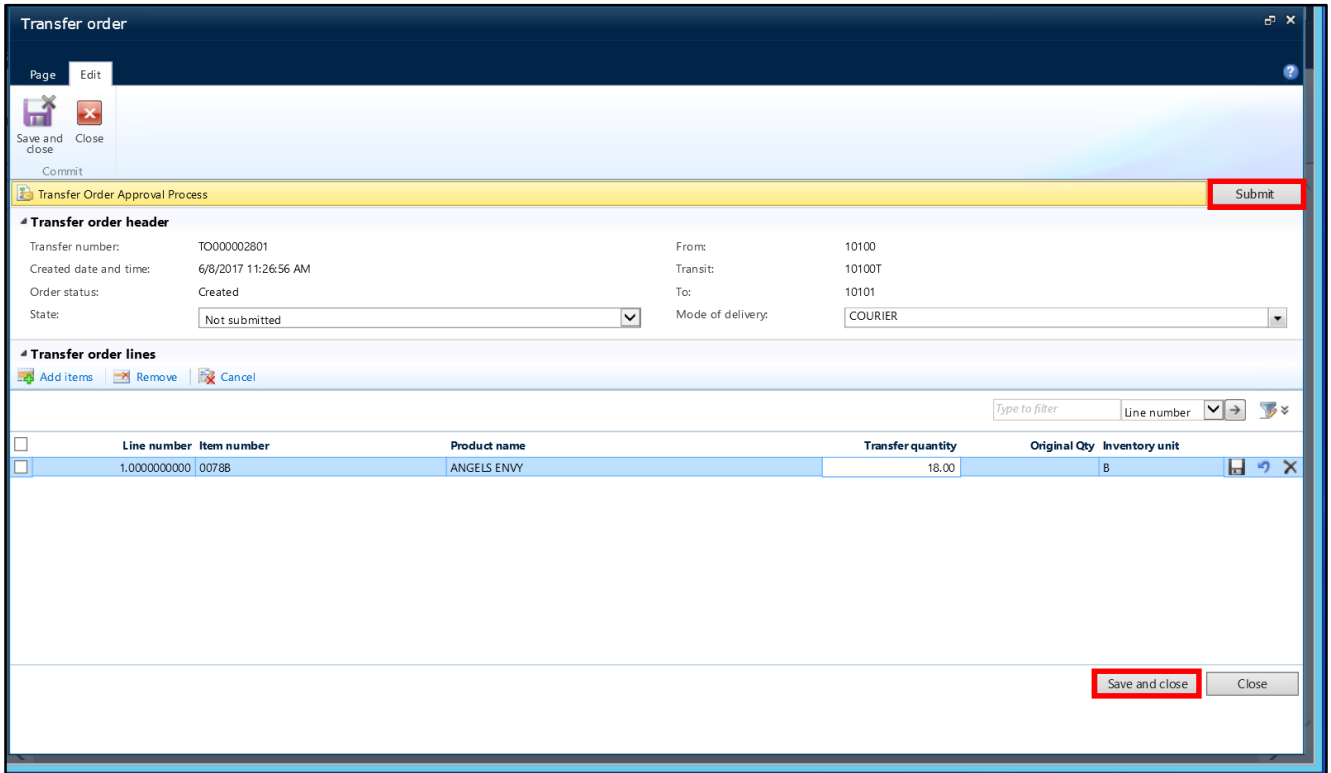
**Items to be added to transfer order**

Remove

<input type="checkbox"/>	Item number	Product name	Transfer quantity	Inventory unit
<input type="checkbox"/>	00788	ANGELS ENVY	18.00	B

18.


To Save and Submit:	To Save and Close:
Click  and go to Step 19.	Click  . You have completed this task and can submit at a later time.

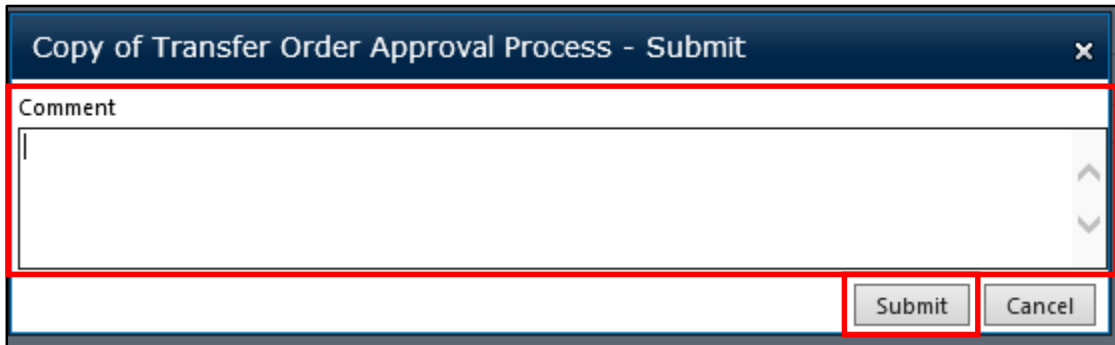


19. Enter comments in the **Comments** field if desired.

20. Click  to complete the task.



After clicking , the State of the order will change to “Submitted” and awaits manual approval from the DOLC. Upon DOLC approval, the State of the order will become “Approved”.



## Results

You have created an agency to agency transfer order.