

VERSION 3.0  
NOVEMBER 28, 2022

# Apps for Greentree

## INVENTORY LOCATION TRANSFER

APP NUMBER: 010034

Powered by:

**MYOB** Greentree

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## FEATURES

### 1. The Inventory Location Transfer App controls the process of creating and fulfilling location transfers, end-to-end.

Create an Inventory Location Transfer request from:

- The Data Entry menu - to control, re-balance or replenish stock levels
- During Sales Order entry - if there is insufficient stock available to fulfil the order
- During Factory Order entry - if there is insufficient stock available to fulfil the order

Administer and record the progress of the Transfer through each stage:

- Creation of the Transfer
- Despatch from the sending location
- Receipt at the receiving location

Monitor the status of the Transfer using a Greentree Workflow Desktop Panel.

Other benefits include better control of stock levels as you can obtain excess stock from other branches rather than ordering in more.

As of Greentree version 3D@6 the App supports Location Transfers of Serial/Lot tracked items.

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## IMPORTANT NOTES

- We recommend that you test the configuration of the App thoroughly in a test system prior to deploying the App in your live Greentree system.
- If the sales order is cancelled or if the quantity is changed this will NOT update the location.
- Sales orders that have linked Location Transfer Requests, can be cancelled but not deleted.
- We recommend creating a desktop panel to identify and highlight order lines that require action. This desktop should then be assigned to the relevant user(s)

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## OTHER REQUIREMENTS

**Greentree Modules:** Inventory, Sales Orders, Manufacturing, Workflow (optional but recommended)

**Associated Apps:** None.

# USER INSTRUCTIONS

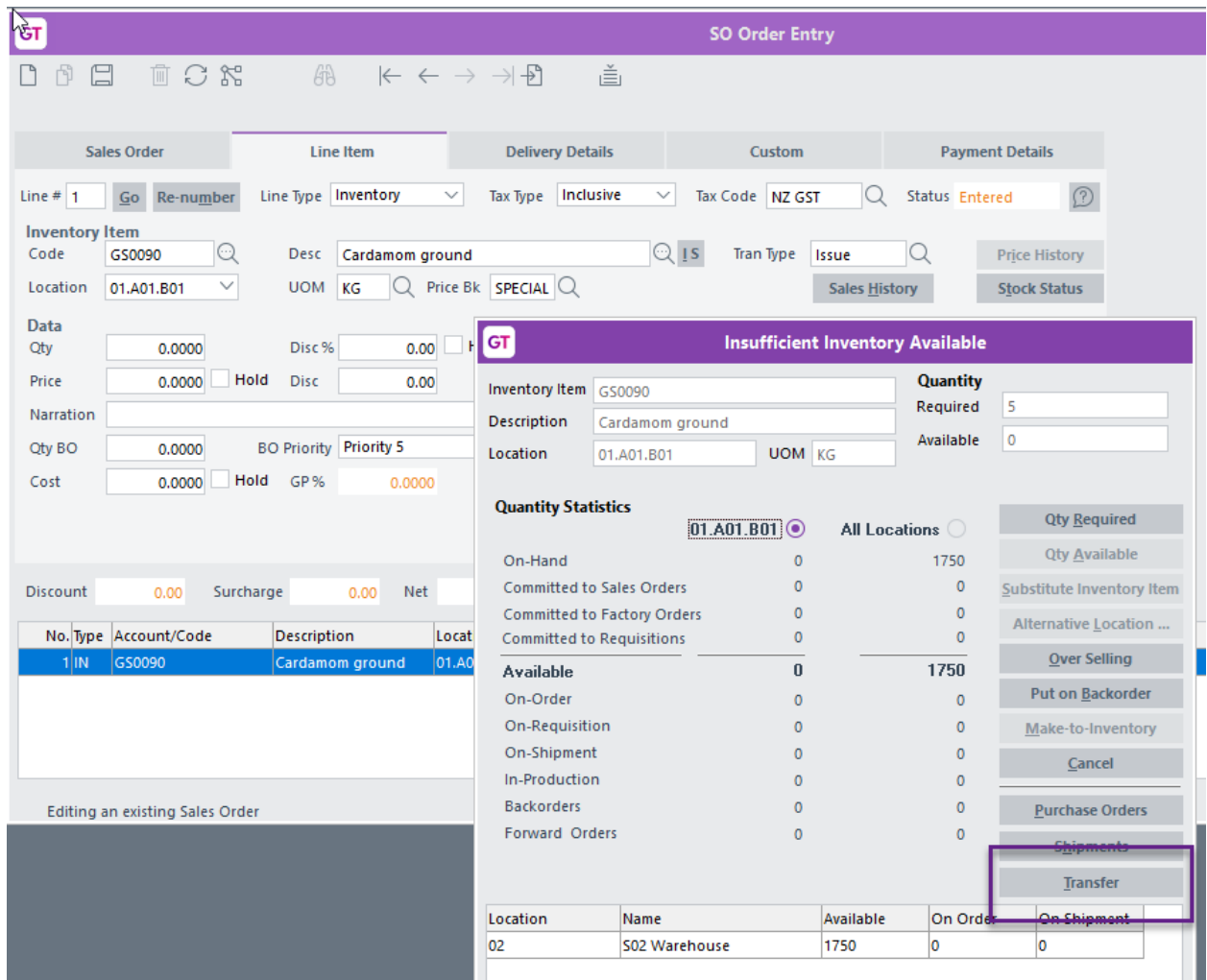
## END-TO-END PROCESS

### CREATING THE INVENTORY LOCATION TRANSFER REQUEST

This example illustrates a situation where there is Insufficient Stock at the user's location to complete a Sales Order.

When the Insufficient Inventory Available box appears during Sales Order Entry, you can choose to request that stock be transferred to you from another location.

1. Select the menu item | Data Entry | Sales Order | Sales Order Entry |
2. Complete the header fields, enter the required stock item on the line



If no stock is available from your location, the insufficient stock form is displayed. Stock held at all other locations is displayed at the bottom of the form.

3. Select a location to transfer from by clicking on it.

4. Click the Transfer button and The **Location Transfer Request** form is displayed.

The screenshot shows the 'Location Transfer Request' form. At the top, the branch is set to '01 (Auckland)'. The 'Document Details' section includes fields for Reference (500069), Date (31/10/18), Expected date (31/10/18), Status (Entered), and Entered by (SUPER). The Description is 'SO 500069 Transfer', From Location is '02', To Location is '01.A01.B01', and Narration is 'Branch transfer from 02 to 01.A01.B01 to supply Sales Order'. A 'Send Request' button is highlighted with a red box. Below the form is a table with the following data:

Stock Code	Description	UOM	Quantity	Cost	Total	Send Qty	Receive Qty	Available Qty	Status	Analysis Code	Narration
G50090	Cardamom ground	KG	5,0000	1,2000	6,0000			1750,0000	Entered	MISC	
									Entered		

- Branch** This will default to the branch selected under User Preferences
- Reference** The reference will default to mirror the Sales Order number the Transfer was populated from
- Date** This will default to the current date
- Expected date** Enter the date on which the items are expected to be received
- Status** This indicates the stage or status of the Transfer. The system will automatically maintain/update this field
- Description** This field will default to include the SO number and indicate that it is a transfer.
- From Location** This field will default based on the Location line you clicked while in the Insufficient Inventory Available screen.
- To Location** This field will default based on the location selected on the Sales Order.
- Narration** The narration field will auto populate. It will contain details regarding the transfer and related SO number. This can be overridden.
- Delivery to Customer** If this is ticked then the customer name and address will be populated and displayed from the sales order delivery details. In this situation, the generating branch will still have to confirm receipts of the transfer and then release their own packing slip. The branch sending the goods will have to put a comment on their own packing slip to say that the line is being supplied separately.

- If the item you have chosen is Serial/Lot tracked, and if the setting **Auto Suspend on Send** is not ticked in the App's Module control during configuration – the Serial/Lot Number Entry form will pop up.

The screenshot shows the 'Serial/Lot Number Entry' window. At the top, the title bar reads 'GT Serial/Lot Number Entry'. Below the title bar are icons for save, refresh, and search. The main form area contains the following fields:

- Inventory item: **GS0075** (code) and **Caraway seed - Bulk** (description)
- Location: **02**
- Unit of measure: **KG**
- Quantities section:
  - Required: **5.0000**
  - Entered: **5.0000**
  - Difference: **0.0000**

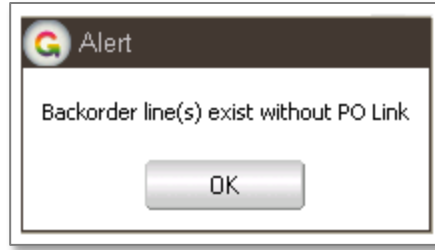
Below the quantities is a table with the following data:

Lot Number	Description	Qty available	Quantity
66970		1000.0000	5.0000

On the right side of the form, there are five buttons: **Auto allocate**, **Auto generate**, **Suspend**, **OK**, and **Cancel**.

Select or auto-allocate a Serial/Lot number per item quantity.

- You can choose to **Send** the request now, or if you think there may be other items for your sales order that you don't have in stock you can **Save** which allows them to be appended.
- Clicking **Send Request** or **Save** will close the transfer form and set the status of the Location Transfer Request to **Pending**.
- Complete the rest of your sales order line.
- You can then **Print** or **Save** your Sales Order. Note the Sales Order will have a status of Backorder with the quantity of the location transfer shown as backordered.
- The system will provide the following alert if the **Enable Auto Append Apply on SO-PO Linking** has been selected in the Location Transfer Request control screen(as detailed in the configuration section of this document)



11. Click **OK**
12. This will invoke the SO-PO Linking Form. This is a standard Greentree function which is available if the PO module is in use.

### MONITORING TRANSFERS VIA THE WORKFLOW DESKTOP

One or more panels may be set up on the workflow desktop allowing you to monitor and take action on Location Transfers, depending on their status.

Location Transfer Requests			
Status	Pending		
Location	<Any>		
reference	From Loc	To Loc	description
500069	02	01.A01.B01	SO 500069 Transfer

Double-click on any line in the workflow desktop panel to open the Transfer request form in order to see the full details or to perform an action.

Valid Status for Location transfer requests are:

- Entered**                      Has been entered but not processed
- Pending**                      Transfer has been sent to the From location
- Sent to In-Transit**              From location has sent the goods
- Completed**                      Goods have been received by the requesting location
- Cancelled**                      Request was cancelled

## CONFIRMING DESPATCH OF INVENTORY FROM A LOCATION TRANSFER REQUEST

### 1. Drill into the Transfer Request

Branch: 01 (Auckland)

Document Details

Document details

Reference: 500069 Description: SO 500069 Transfer

Date: 31 / 10 / 18 From Location: 02

Expected date: 31 / 10 / 18 To Location: 01.A01.B01

Status: Pending Narration: Branch transfer from 02 to 01.A01.B01 to supply Sales Order

Entered by: SUPER  Deliver to Customer

Stock Code	Description	UOM	Quantity	Cost	Total	Send Qty	Receive Qty	Available Qty	Status	Analysis Code	Narration
GS0090	Cardamom ground	KG	5.0000	1.2000	6.0000	5.0000	0.0000	1750.0000	Pending	MISC	Entered

- Print the transfer so warehouse staff have a piece of paper to identify the items to pick and pack by clicking the Print transfer button
- Once stock has been picked you can optionally add a freight charge for sending the items to the other location
- Click on the blank line and enter a valid freight item – must be defined in App control.
- If the item you have chosen is Serial/Lot tracked, and if the setting **Auto Suspend on Send** is ticked in the App's Module control during configuration - right-click your mouse on the line and select "Serial/Lot" from the right-click menu, for the item or items being sent.

Item	UOM	Quantity	Cost
...y seed - Bulk	KG	5.0000	3.6500

Right-click menu options: Cancel, Serial/Lot

The Greentree Serial/Lot selection screen will appear prompting you to remove the Suspend line (usually by clicking on the line and pressing the Shift+F2 keys).



**GT** Serial/Lot Number Entry

Inventory item:  Caraway seed - Bulk

Location:  Unit of measure:

Quantities

Required:  Entered:  Difference:

Lot Number	Description	Qty available	Quantity
Suspense	Suspense Lot		10.0000
<input type="text"/>	<input type="text"/>		

Auto allocate  
Auto generate  
Suspense  
OK  
Cancel

Then select or auto-allocate a Serial/Lot number per item quantity.

- Click the **Confirm Sent** button – this will book the I stock out of the sending location and into an In-transit location – specified in App control.

## CONFIRMING RECEIPT OF INVENTORY FROM A LOCATION TRANSFER REQUEST

When the goods arrive in the receiving warehouse, check they are as requested

1. Drill into the Location Transfer Request from the desktop
2. Edit quantities on the Location transfer request as necessary
3. Click Confirm Received

Description	UOM	Quantity	Cost	Total	Send Qty	Receive Qty	Available Qty	Status	Analysis Code	Narration
Cardamom ground	KG	5.0000	1.2000	6.0000	5.0000	5.0000	1745.0000	Sent to In-Transit	MISC	

This will update the status to Completed.

The goods will have been transferred out of In-Transit and to the requesting location. If a Freight charge was added this will be expensed.

If the transfer was linked to a Sales Order or Factory Order, the stock will be committed or sent to Packing Slip depending on the App Control setting.

Because this item is setup to be expensed, the item will also have a Negative adjustment created (as per the App control transaction type)

31/10/18	31/10/18	Location Transfer	500069.1.0	S1123	02	-1.0000	EA	-10.00	-1	
31/10/18	31/10/18	Location Transfer	500069.1.0	S1123	9801	1.0000	EA	0.00	1	Transfer from S
31/10/18	31/10/18	Location Transfer	500069.1.0	S1124	9801	-1.0000	EA	-9.90	-1	
31/10/18	31/10/18	Location Transfer	500069.1.0	S1124	01.A01.B01	1.0000	EA	0.00	1	Transfer from Ir
31/10/18	31/10/18	Negative Adjustment	500069.1.0	S1124	01.A01.B01	-1.0000	EA	-9.80	-1	

If the Transfer request to commit IN on receipt is ticked in the App Control, the sales order line will be released but no packing slip generated. If it is not ticked, then the sales order line will be released, and the packing slip will be generated.

## TRANSFERRING STOCK TO SUPPLY A FACTORY ORDER

When you raise a Factory Order, if you have insufficient stock of any component, this can be transferred from another location.

Editing an existing factory order There are 27 factory orders

1. Select the component line from the location you want to transfer from
2. Click the Location transfer button. This will then process the same as the Sales Order detailed above.

## MANUAL INVENTORY LOCATION TRANSFER REQUEST

If you know that you have insufficient stock of something and there is excess stock in another location, you can manually enter a location transfer request.

1. Select the menu item | [Data Entry](#) | [Inventory](#) | [Location Transfer Request Entry](#) |
2. Complete the form per below

Reference

Type a number for this location transfer request

- Description** This appears on the desktop and can be printed on your transfer so should explain why the transfer is being requested
- From Location** Select the location to transfer stock From
- To Location** Select your requesting location
- Narration** Type any other information either the sending or receiving location may require

3. Enter the stock items required. You may enter several.
4. If an item you have chosen is Serial/Lot tracked, and if the setting **Auto Suspend on Send** is not ticked in the App's Module control during configuration - right-click your mouse on the line and select "Serial/Lot" from the right-click menu.

1.2000	12.0000		
3.6500	36.5000		

Cancel  
 Serial/Lot

The Greentree Serial/Lot selection screen will appear prompting you to select or auto-allocate a Serial/Lot number per item quantity.

GT
Serial/Lot Number Entry
⌵ □ ✕

Inventory item

Location

Unit of measure

**Quantities**

Required	10.0000	Entered	10.0000	Difference	0.0000
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Lot Number	Description	Qty available	Quantity
78996		200.0000	10.0000

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## ADDITIONAL NOTES FOR WHEN BIN MANAGEMENT IS IN USE

Location transfers when bin management is in use will have extra steps involved, to select Bins From and Bins To.

Bins From are able to be adjusted until Confirm Sent is clicked (when the stock is moved to the In-transit location).

Bins To must be entered before the transfer can be Confirm Received.

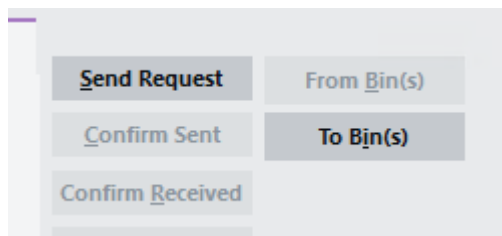
The location transferred to is at that point locked.

From Bins and To Bins buttons visibility – buttons will only be enabled if bins are in use in to/from warehouse.

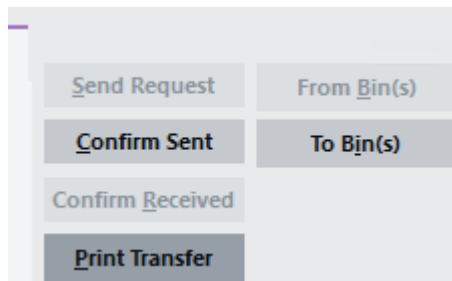
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## LOCATION TRANSFER STATUS SUMMARY

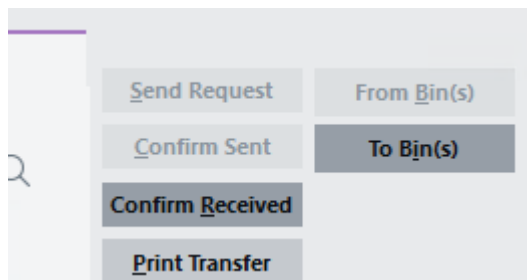
Initial status is Entered.



Send request > Status becomes Pending



Confirm sent > Status becomes Sent to In-Transit



Enter To bins details. Buttons don't change

Confirm Received > Status becomes Completed.

## IMPLEMENTATION GUIDE

Please refer to the Important Notes section above before installing and configuring this App.

### APP INSTALLATION

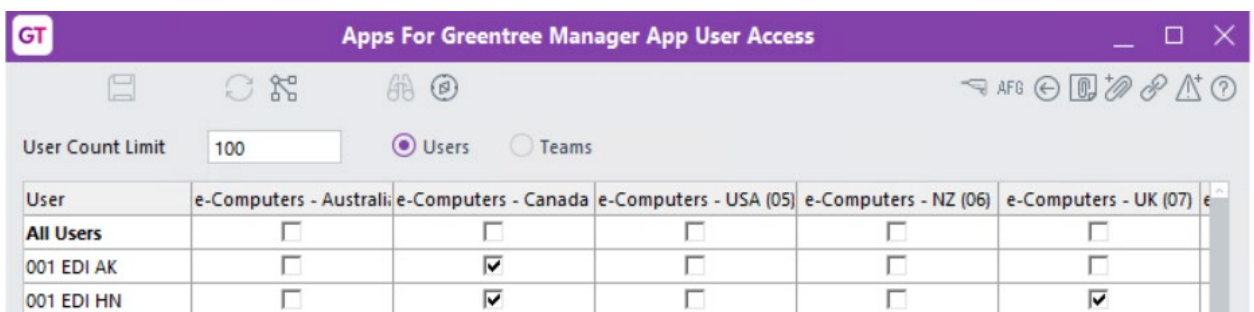
1. Log into Greentree as the Super user
2. Select the menu item | System | Apps For Greentree | Apps Module Control |
3. Either enter the New Registration Codes supplied and click Install App or click the Check for Purchased Apps button to display a list of apps recently purchased or renewed to install in bulk.



4. Select/Highlight the Inventory Location Transfer App.



5. Click on the Edit Users button and select the users who will be configured to use Inventory Location Transfer, for which companies.



6. Once you have selected the users, Save the settings, and Close the window.
7. Save and Close the Module Control form.

## OTHER GREENTREE CONFIGURATION

Complete the following set-up in Greentree before configuring the App.

### IN TRANSACTION TYPES SETUP

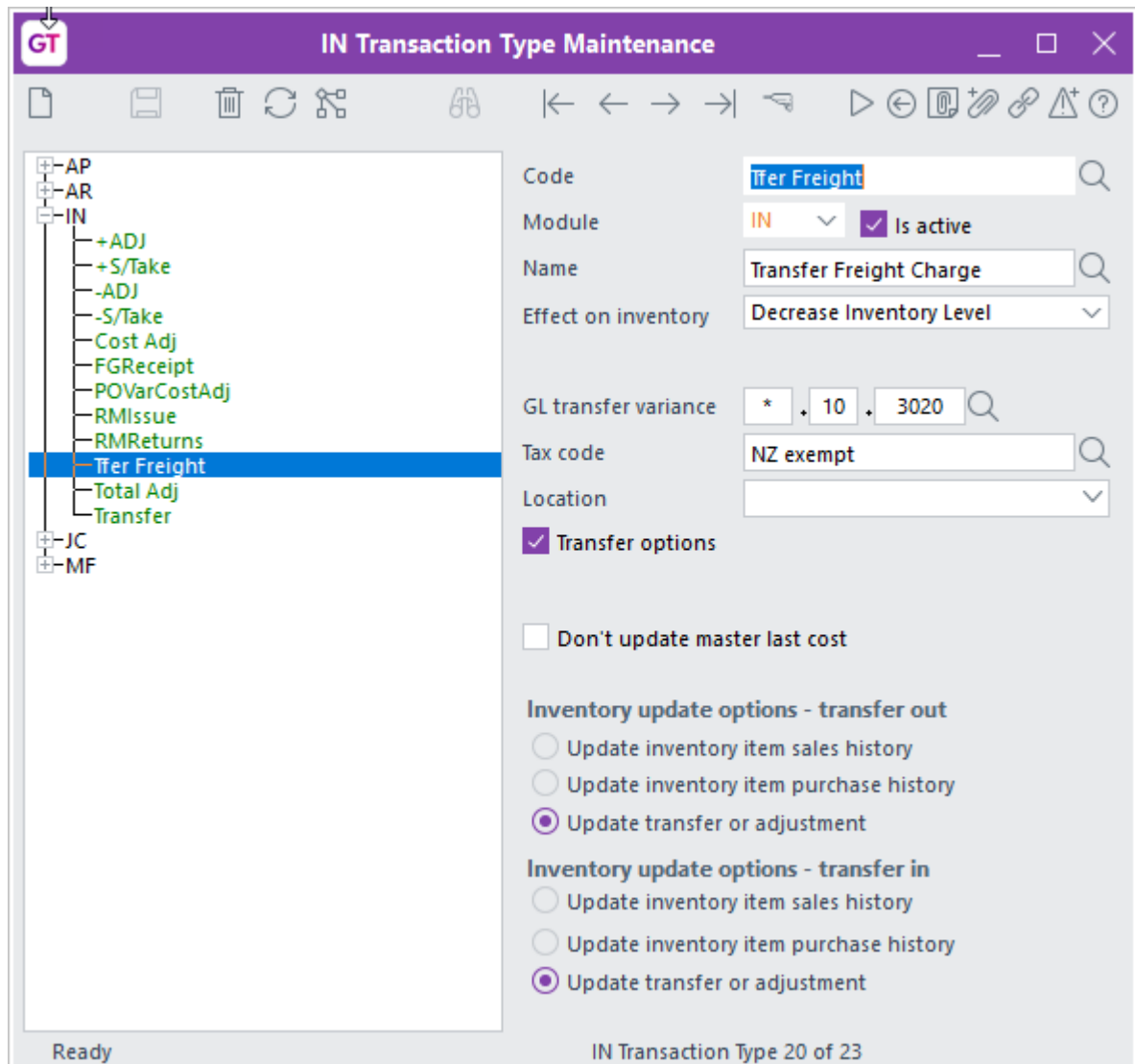
| System | Inventory | Transaction Type Maintenance |

Several IN Transaction types must be set up for use with this App.

One for transfers:

The screenshot shows the 'IN Transaction Type Maintenance' window. The left pane displays a tree view of transaction types, with 'Transfer' selected under the 'IN' category. The right pane shows the configuration for the 'Transfer' type. The 'Code' is 'Transfer', 'Module' is 'IN' (with 'Is active' checked), 'Name' is 'Location Transfer', and 'Effect on inventory' is 'None'. The 'GL transfer variance' is set to '\* + \* + \*', and the 'Tax code' is 'NZ GST'. The 'Location' field is empty. The 'Transfer options' checkbox is checked, while 'Don't update master last cost' is unchecked. Under 'Inventory update options - transfer out', the 'Update transfer or adjustment' radio button is selected. Similarly, under 'Inventory update options - transfer in', the 'Update transfer or adjustment' radio button is selected. The status bar at the bottom indicates 'Ready' and 'IN Transaction Type 22 of 23'.

One to expense charges – this must Decrease inventory levels:



## IN LOCATION MAINTENANCE

[| System | Inventory | Location Maintenance |](#)

An In-Transit location must be set up, used to display the stock that is In Transit – i.e. has been sent but not yet confirmed as received.

1. Select the menu item [| System | Inventory | Location Maintenance |](#)



GT Location Maintenance

Code: 9801 Custom

Name: In Transit Auckland

Hold inventory @ this level  Warehouse  Is transit

Active  Protected

Print location transfers at this level  Scan locations

Exclude from Reorder Workbench

Address: \_\_\_\_\_

Suburb: \_\_\_\_\_

Post code: \_\_\_\_\_ City: \_\_\_\_\_

Country: New Zealand

Phone: (00) 000 0000

Fax: (00) 000 0000

Contact: \_\_\_\_\_

Email: \_\_\_\_\_

Branch: 01(Auckland)

Inventory Acc: \_\_\_\_\_

LTR Printer: \_\_\_\_\_

**Packing Slip Despatch**

Use Generic Barcode

Exclude from Check Form

Hold inventory at this level  
Warehouse at this level  
Hold inventory and warehouse at this level

Ready INLocation 18 of 19

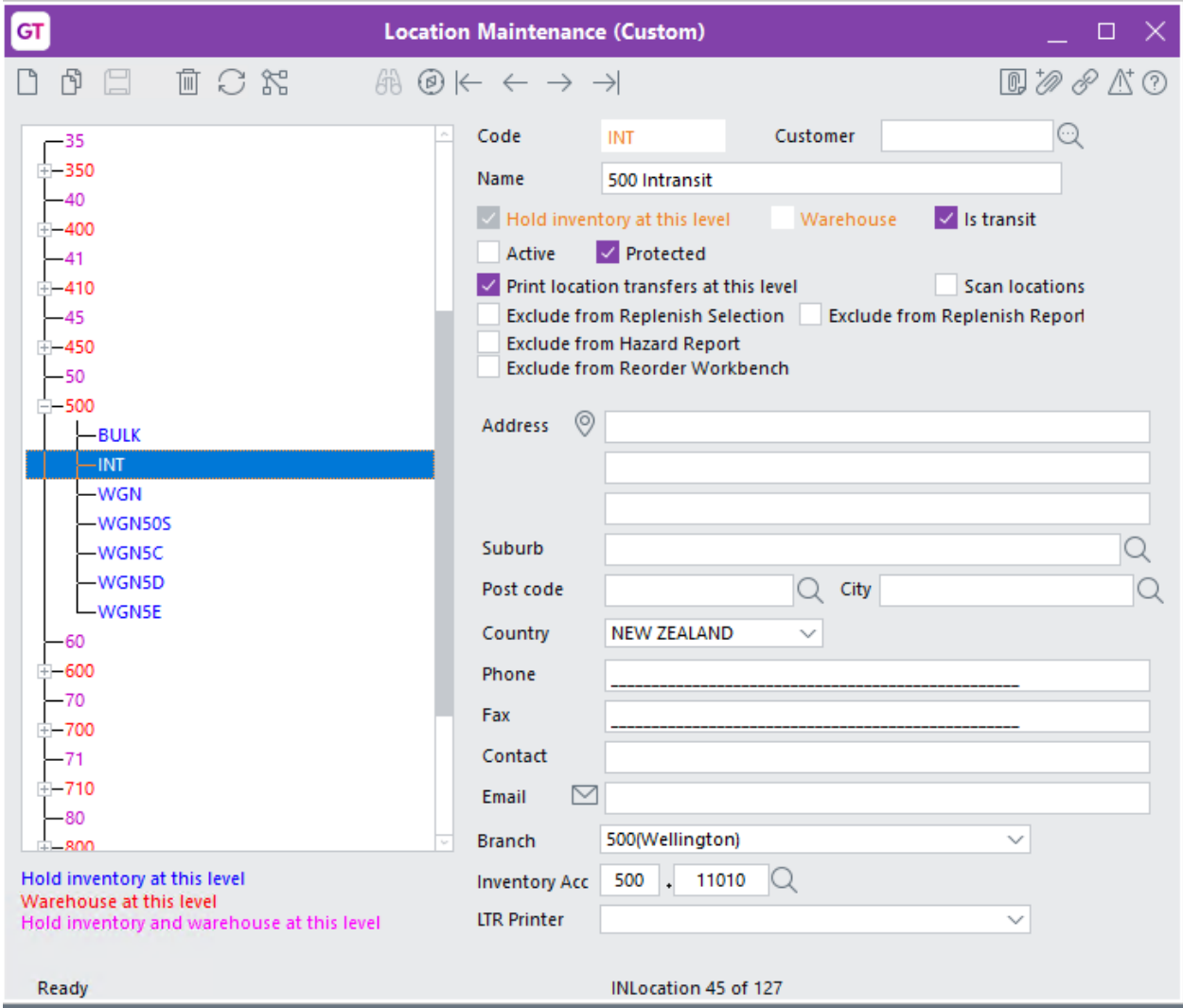
2. The Location must have **Hold Inventory at this level** ticked.
3. The Location must have **Is active** ticked.
4. The Location must have **Is transit** ticked.
5. The Location must have **Is protected** ticked so that stock cannot be sold out of this Location.
6. Save the settings using the **Save** icon in the header and **Close** the window.

**MULTI TRANSIT LOCATIONS** can be used by selecting the **Multi Transit Locations** checkbox in the app control form.

In this case, a child location can be set up per Warehouse as a transit location, rather than using the default. At the time of sending, the transit location will be read from all child locations of the destination location to find the first one set up as a transit location, and this is used as the transit location for the transfer.

There is no visibility of anything further; simply it is a warehouse specific transit location used for the warehouse that what would default if this option was not ticked. The behaviour of inventory via a transit location is otherwise no different.

This is an example use of a specific transit location (INT) for warehouse 500



## IN INVENTORY ITEM MAINTENANCE

| Data Entry | Inventory | Inventory Item Maintenance |

Setup inventory items for any expenses that can be added to a Location Transfer request e.g. Freight, Insurance

The screenshot shows the 'IN Inventory Item Maintenance' window. At the top, there are navigation icons and a search bar with 'Code FR' and 'Description Freight'. Below this are tabs for 'Main', 'Defaults', 'Transactions', 'Custom', 'Notes', 'Sales Orders', 'Sales History', and 'Related'. The 'Main' tab is selected and contains several sections:

- Analysis code:** MISC (MISCELLANEOUS)
- Decimal item unit:** 0 Decimal Places
- Job activity code:** (empty)
- Type:** Not Serial/Lot Item
- Track dimensions:**  (unchecked)
- Kitsets exist:**  (unchecked)
- Unit weight:** (empty)
- Unit volume:** (empty)
- Stocking unit:** EA
- Non diminishing:**  (checked)
- Keep warranty details:**  (unchecked)
- Allow negative available:**  (checked)
- Allow negative on-hand:**  (unchecked)
- Stocktake details:**
  - Cycle:** Monthly
  - Stock ranking:** None
- Table:**

Location	Next Stocktake Date	Stocktake in Progress	Last Stocktake Date

On the right side, the 'On-hand quantities' section displays a list of quantities, all currently at 0:

- On-hand: 0
- Committed to sales orders: 0
- Picked Qty: 0
- Un-picked Qty: 0
- Committed to factory orders: 0
- Committed to requisitions: 0
- Protected: 0
- Available: 0
- On-order: 0
- On-requisition: 0
- On-shipment: 0
- In-production: 0
- Backorders: 0
- POs Allocated to Jobs: 0
- Forward orders: 0
- Balance: 0

At the bottom right, there are buttons for 'Period balances', 'Demand history', 'Date history', and 'Location balances'.

These items would normally be non-diminishing. If the charge is a set price, then also setup the Price Maintenance.

## LOCATION TRANSFER FORM

| System | Customisation | Report or New Report Writer |

You will need to setup a Location Transfer Request form within the Greentree report writer to specify the requesting Location, sending location and goods to be supplied.

The screenshot displays the 'Report Design - IN Location Transfer - App' window. The main area is a grid with the title 'Transfer Request'. The design includes several data fields:

- From:** DB:myFromLocation:myINLocation:name, DB:myFromLocation:myINLocation:myB
- Deliver To:** DB:myToLocation:myINLocation:name, DB:myToLocation:myINLocation:myINAddress:
- To:** DB:myToLocation:myINLocation:name, DB:myToLocation:myINLocation:myBrar
- Order Date:** DB:date
- Transfer No:** DB:reference
- Operator:** DB:enteredBy
- Comment:** DB:narration

At the bottom, a table structure is defined with the following columns: Bin, Part Number, Description, Units, Qty, and Ship. The data source for this table is DB:myVAp DB:myVAppsStor DB:myVAppsStockItem:myStockItem:description DB:myVA:sendQty.

The left sidebar contains the following settings:

- Units: pixels
- Apply security: None
- Display grid:
- Snap:  Display rulers:
- Current section: [dropdown]
- Current field: [dropdown]
- Current profile: Default Profile
- Form Details:
  - Paper size: A4
  - Page/form width: 749 pixels
  - Form height: 1061 pixels
  - Page height: 1060 units
  - Landscape:
  - Forms Manager Report:
  - Last page phantom job:
  - Repeat horizontal:
  - System report (cannot be modified):
- Class: Company
- Shows: Get ALL IN Location Transfer
- Of class: VAppsLocationTransferRequ

Buttons at the bottom left: Save, Save As, Print, Close.

If required, you can have different versions for each of the Transfer Request statuses.

## APP CONFIGURATION

1. Select the menu item | System | Apps For Greentree | Apps Module Control |
2. Select/Highlight the IN Location Transfer Workbench App.
3. Click on the Change button

**Location Transfer**

Transfer request to only commit IN on receipt

Enable Location Transfer for Sales Order

Enable Location Transfer for Factory Order

Enable Auto Append Apply on SOPOLink

Disable Transfer deletion

Limit Processing to Users default IN Branch

Enable Warehouse Transfers

Clear Form on Confirm/Send/Receive

Use Stock Average Cost

Allow inactive From locations

Allow inactive To locations

Add send and receive info to description

Auto Suspense on Send

Allow Zero Quantities

Allow Hotprint to user's default location

Allow change of sent quantity

Allow Zero Stock On Hand to be Transferred

Suppress Sent Quantity Changed Warning

Do Intransit transfer on Send Request

Multi Transit Locations

Auto generate request reference if not entered

Auto generate request and transaction references

IN Reorder Workbench - Default send qty to 0.00

IN Reorder Workbench - Don't change Pending transfers

Transaction Type: Transfer

Transit Location: INTR

Freight Write-off transaction type: -ADJ

**Expense Items**

**Reports**

Request entered: 0 MAJ IN Transfer App

Request pending: IN Location Transfer - App 2

Request sent: IN Location Transfer - App 3

Request completed: IN Location Transfer - App

Request cancelled: IN Location Transfer - App - Chi

Auto Print

Hide Cost and Total Columns

Print via task queue

Complete the App Control to meet your requirements

Transfer request to only commit IN on receipt

Tick this box if you want to manually generate your Packing Slip after receipt of transferred goods. If false, receipt of

the transfer will generate a packing slip for the linked SO  
Sales order

#### Enable Location Transfer for Sales Order

Tick this box to allow generation and linking of a Location  
Transfer Request to a Sales Order

#### Enable Location Transfer for a Factory Order

Tick this box to allow generation and linking of a Location  
Transfer Request to a Factory Order

#### Enable Auto Append Apply on SOPO Link

Tick this box to allow subsequent lines on a Sales Order to  
be appended to an existing Purchase Order from previous  
lines

#### Disable Transfer Deletion

Tick this box to prevent users from deleting a Location  
Transfer request – they can Cancel lines instead

#### Limit Processing to User's Default IN Branch

Set this flag to prevent a user from modifying a Location  
Transfer record unless that record is for the user's own  
Branch

#### Enable Warehouse Transfers

Set this flag to allow stock to be transferred from multiple  
warehouses on a single Transfer form. This setting allows  
the From warehouse to be set on an individual line rather  
than default from the header

#### Clear Form on Confirm/Send/Receive

Set this flag to have the Location Transfer form cleared  
after the **Send**, **Confirm Sent** and **Confirm Received**  
buttons are pressed

- Use Stock Average Cost** Use the average cost of stock for location transfer calculations
- Auto Suspense on Send** Uses Serial/Lot Suspense as a placeholder for the Serial/Lot number if the location requesting the Transfer is not sure which Serial/Lot number they will be sent. If un-ticked the requesting location must specify which Serial/Lot numbers they require before Sending the Transfer Request
- Allow Zero Quantities** Check this to allow generation of requests where the line quantity has been sent to zero – this might be done by the sending location if they do not want to supply the item
- Allow Hotprint to user's default location**  
Check this to auto hotprint the location transfer to the default printer on the location
- Allow change of sent quantity**  
Check this if the sending location can edit the quantity to be sent
- Allow Zero stock On Hand to be Transferred**  
Check this if a transfer is allowed to be done when the system has zero stock recorded on hand
- Suppress Sent Quantity Changed Warning**  
Check this if allowing zero on hand to transfer and you do NOT want a message displayed
- Do Intransit transfer on send request**  
Check this to have the Stock moved to the In-transit location as soon as the Location transfer request is Sent, i.e. before the Warehouse has confirmed that the stock is packed and dispatched

**Multi Transit Locations** Check this to allow different in-transit locations by To Warehouse. Refer to IN Location Maintenance for setup of a transit location

**Auto generate request reference if not entered**

Check this to have references for location transfers automatically generated if not entered. The related IN Transactions and IN Documents will use the location transfer reference (either generated/entered), with unique suffixes. This is the original behaviour for this app

**Auto generate request and transaction references**

Check this to have transaction references prefixed with the Branch. If not ticked, then reference suffixes are used. When this option is ticked, the preceding checkbox is effectively ignored because all references are then generated

**IN Reorder Workbench – Default send qty to 0.00**

Defaults send qty to zero (instead of Reorder Workbench “Quantity” - only relevant if Reorder Workbench in use 010002

**IN Reorder Workbench – Don’t change Pending transfers**

When checked, this option prevents The IN Reorder Workbench changing Pending Location Transfer Requests. - only relevant if Reorder Workbench in use 010002

**Transaction Type** Select a valid IN Transaction Type for transfers

**Transit Location** Select a valid IN Location to show stock which is in transit between locations

**Freight Write-off transaction type**

Select a valid IN Transaction Type which will be used to expense any freight added to the location transfer



### Expense Items

Click this button to setup the valid Freight or other expense items (pop-up)

Code	Description	Use Standard Cost
FR	Freight	<input checked="" type="checkbox"/>
		<input type="checkbox"/>

### Code

Select the expense item – must exist in IN Inventory Maintenance. Description will display once selected.

### Cancel

Cancel the editing of expense items and return to App Control

### OK

Save expense items and return to App Control

### Reports

These cover all the 5 possible Location Transfer Request statuses and allow the user to configure a specific report for each status. The app comes with a IN Location Transfer – App report which can be modified by the user.

### Auto Print

Automatically print the Location Transfer Request, at the From Location, when the “Send Request” button is pressed

### Hide Cost and Total Column

Check this if you do not want users to see the cost of items in the Location transfer request screen

Print via task queue

Check this if print of transfers should go via the task queue not hotprint

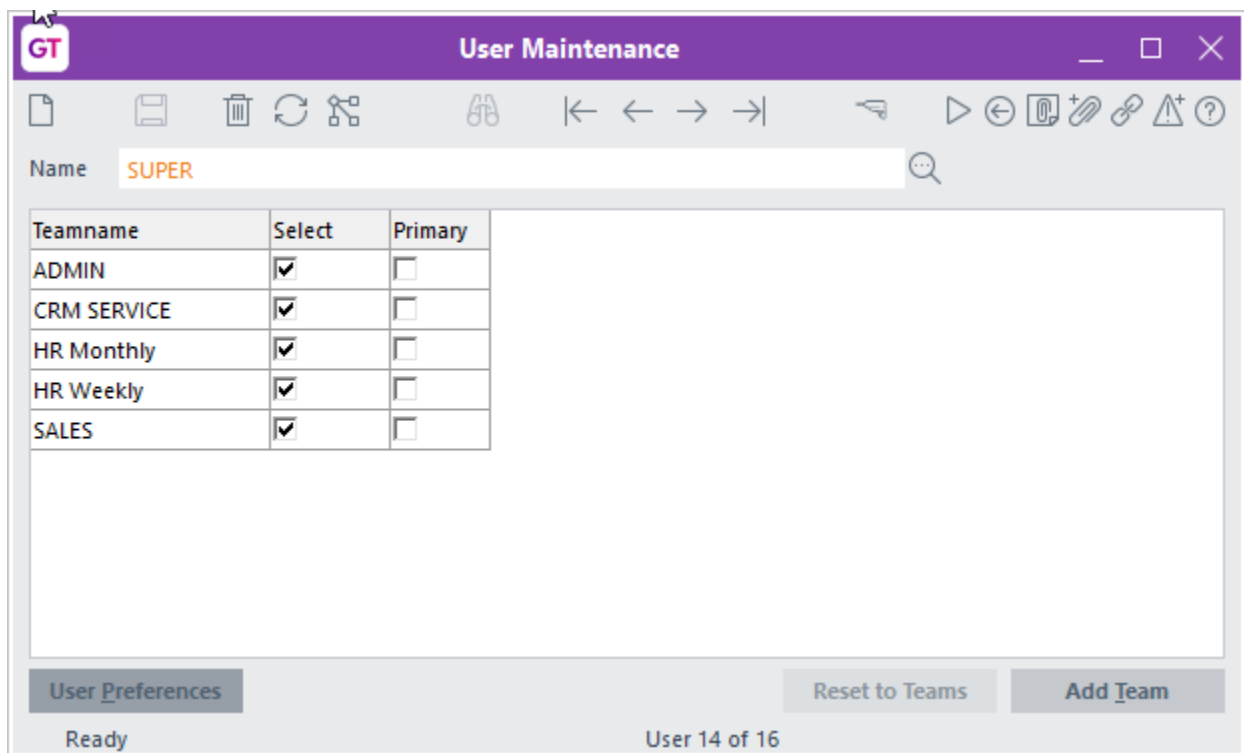
## OTHER GREENTREE CONFIGURATION

### USER SETUP

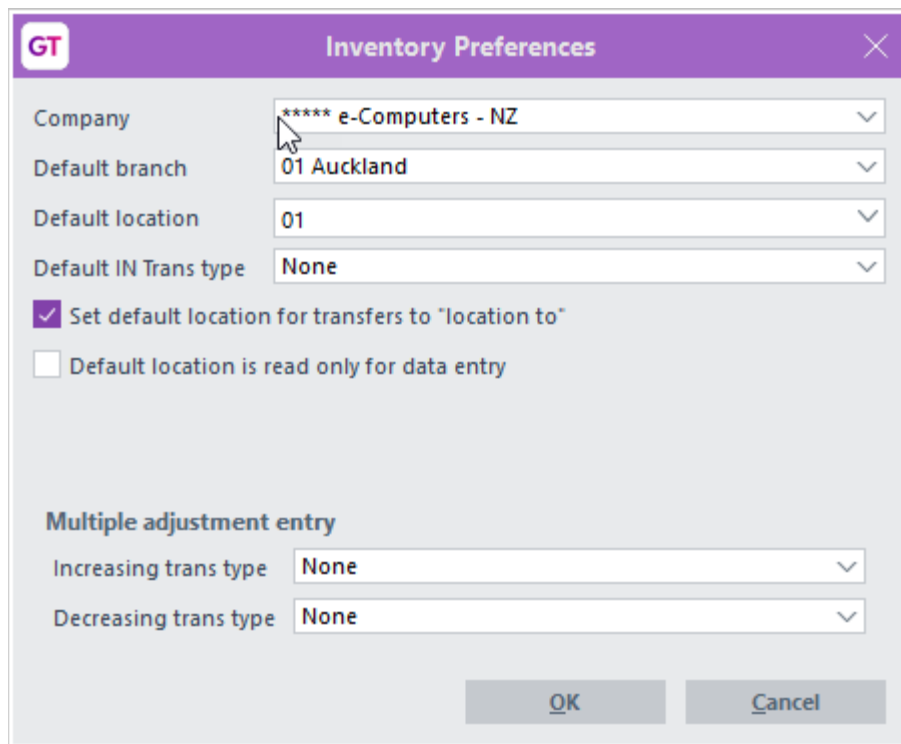
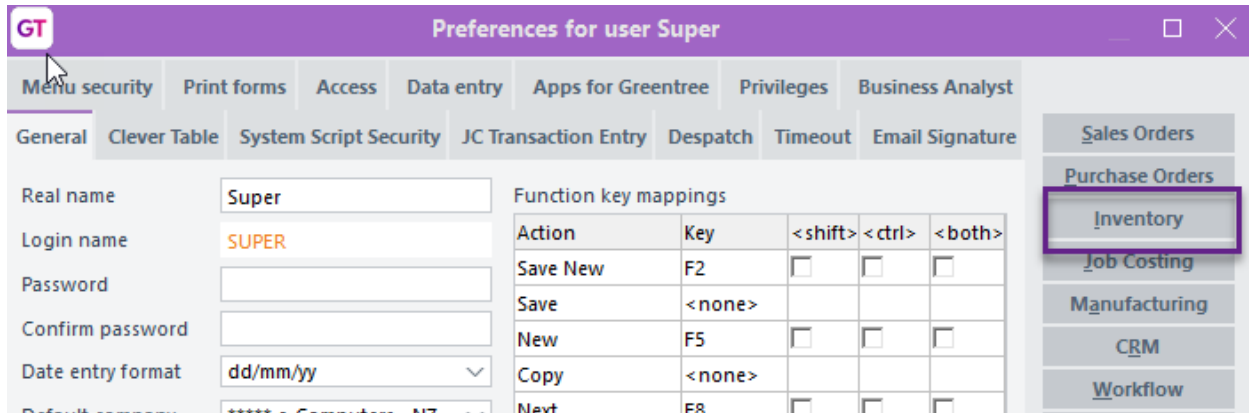
| [System](#) | [System Setup](#) | [User Maintenance](#) |

There is no user specific configuration for this application. The Application will use the Default branch specified in the Inventory User Preferences. Steps below explain where these defaults are set.

1. Go to | [System](#) | [System Setup](#) | [User Maintenance](#) |
2. In the **Name** box, select the relevant user name.
3. Click on the [More Preferences](#) button.



4. Click on the [Inventory](#) button. The [Default branch](#) specified in this screen will be applied to the Inventory Location Transfer Request



5. We recommend creating a section in the users workflow panel that will display Transfer Requests received and Transfers that have been Confirmed as Sent.
6. Click the [Sales Orders](#) button and ensure that the configuration allows for quantities at all locations to be displayed, as shown below: