

Myridas Inter-Site Transfers User Guide

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Inter-Site Transfers

The m-hance Myridas Inter-Site Transfers module provides the functionality for carrying out stock transfers between sites. When physically transferring Items between sites, there will be a time period when the Items are not at either site, whether they are being transferred across a country or even across a business estate. The Inter-Site Transfers module allows you to set up "In-Transit" sites so that stock transferred between sites can be continually tracked.

The main features of Inter-Site Transfers are:

- The facility to transfer stock between sites whilst maintaining permanent visibility
- The facility to define In-Transit sites
- The facility to set up internal debtors and creditors
- The facility to create purchase orders for inter-site transfers
- Underlying processing automatically creates corresponding sales orders for all internal purchase orders

Note that when carrying out Inter-Site Transfers on Serial Tracked Items, the Serial Numbers may not be greater than nineteen characters long. This should be taken into account when setting up Serial Tracking on Items that may be involved in Inter-Site Transfers.

In-Transit Sites

Multiple In-Transit sites can be set up in the [Inter-Site Details Maintenance window](#). In-Transit sites are used solely for the allocation of Inter-Site Transfers and represent the period during which Items are at neither the purchasing nor the selling site.

Internal Debtors and Creditors

Internal Debtors and Creditors are used primarily in sales and purchasing transactions where debtors and creditors must be entered. All sites involved in Inter-Site transfers should have Internal Debtor and Internal Creditor values assigned to them in the Inter-Site Details Maintenance window.

The Inter-Site Transfer cycle

Status	Action	Item Location
0	New Internal purchase order created by the ordering site (Site B) against the Internal Creditor ID representing the sending site (Site A)	Site A
1	Purchase Order released	Site A
2	Corresponding Sales Order automatically created against the Internal Debtor ID representing the ordering site (Site B)	Site A

3	Sales Order transferred to Invoice and Posted	In-Transit Site
4	Corresponding Receivings Transaction posted	Site B

Automatic Creation of Sales Orders

Two mechanisms are available for the automatic creation of inter-site Sales Orders:

1. Econnect – available from Myridas 11.0.4 onwards – see [Appendix B](#) for details
2. Nolan Business Solutions Sales Order Import – see [Appendix C](#) for details

The method to be used is specified on the [Inter-Site Transfers Setup window](#).

1. Inter-Site Transfers Setup window



Tools >> Setup >> m-hance >> Inter Site Transfers >> Inter Site Transfer Setup

Use the Inter-Site Transfers Setup window to:

1. Set up Inter-site transfer options

*The Inter-Site
Transfers Setup
window*

1.1 Setting Up Inter-Site Transfer Parameters

To set up Inter-Site Transfer options in the Inter-Site Transfers Setup window:

Stock "transferred" to In-Transit Sites will be assigned to the next sequential Batch ID. If you do not set up details in this window then the first inventory Batch ID will automatically be defaulted to IST000000000001.

1. Enter an Inter-Site Batch Prefix. All Inter-Site Transfer generated inventory adjustments will be assigned to batches beginning with this prefix, for example, IST0000000001.
2. Enter the Inter-Site Batch Next Number. This number will commence the numbered sequencing of the Inter-Site Batches.
3. Choose the method to be used to Create Sales Orders. The available options are eConnect (see Appendix B for details) and Nolans SOP Import (see Appendix C for details).

4. If using eConnect to create Sales Orders, specify the default Batch ID to be used. This Batch ID will be used if a Batch ID is not specified against the sending Site in the [Inter-Site Details Maintenance window](#).
5. Select the Item History Summary Updates for IST's checkbox if you want the Microsoft Dynamics™ GP Item History window to display details of Inter-Site Transfers.

If you do not select this option then Inter-Site Transfer details will not be displayed in the Item History window.
6. Select the Ignore Order Method for IST's within PO Generator checkbox if you want any order methods set up in the Purchase Order Generator Item Maintenance window to be ignored when generating internal purchase orders.
7. Select the IST Receipt Validation option if you import POP Receiving transactions through econnect or another integration tool and would like the associated Inter-site transfer cross-reference information to be generated prior to posting. See [Validating Imported Receipts](#) for more details.
8. If you choose the Record Transaction History option, when an Inter-site transfer receipt is posted any related in-transit records (tcsSOPTB00029_IST_InTrns table) will be transferred to a history table. The Clear Transaction History button can be used to remove old records from the history table. When you click the button, a window will open allowing you to remove all records, or records older than a specified date.
9. If using eConnect to create Sales Orders, by default the orders will be created in the Batch specified against the sending site in the [Inter-Site Details Maintenance window](#), or if no batch has been specified against the site the default eConnect Batch ID (above) will be used. To override this with a sequential or user-id based Batch ID, select the Override Site Batch checkbox.

If using Nolans' SOP Import to create Sales Orders, by default, orders will be created with the Batch ID specified as the Import Batch in the [Import Definitions Maintenance window](#). To override this with a sequential or user-id based Batch ID, select the Override SOP Import Batch checkbox.
10. If you have chosen to override the Site Batch (or SOP Import Batch), select to use either a Sequential Batch Number or a User ID Based Batch.
11. If you have chosen to override the Site Batch (or SOP Import Batch), enter an Import Batch Prefix, e.g. "IST".
12. If you have chosen to use a sequential Batch Number, the first Batch Number/Seq will default to 000000000001. You can change this if you wish. The Batch ID used for inter-site sales orders will be made up of the Batch Prefix followed by the sequential number e.g. IST000000000001.

If you have chosen to use a User ID Based Batch, the Batch ID used for inter-site sales orders will be made up of the Batch Prefix followed by the user id, e.g. IST-user1.
13. Select to use Current Date or PO Required date as the Requested Ship Date on the Imported Order. This determines how the requested ship date will be set when the inter-site sales order is created.

14. Click OK.

2. Inter-Site Details Maintenance window



Tools >> Setup >> m-hance >> Inter Site Transfers >> IST Site Setup

Use the Inter-Site Details Maintenance window to:

- Set up In-Transit Sites
- Set up and maintain sites for Inter-Site Transfers

*The Inter-Site
Details
Maintenance
window*

Note that this window is also available as an Additional option through the Microsoft Dynamics™ GP Site Maintenance, Debtor Maintenance and Creditor Maintenance windows.

2.1 Setting Up In-Transit Sites

To set up In-Transit Sites in the Inter-Site Details Maintenance window:

1. Enter a Site ID or select one using the lookup.

If you enter a Site that does not already exist then you will be asked if you want to create the Site. If you click Yes then the Site Maintenance window will be displayed.

To enable more straightforward verification of stock balances it is recommended that a different In-Transit Site is set up for every site used for Inter-Site Transfers.

2. Mark the In-Transit Site check box. All other fields will automatically voided.



Note that if the Site you have selected is attached to an Internal Debtor or Creditor, or has outstanding sales or purchasing transactions against it, then you will be unable to select it as an It-Transit Site. A warning will be displayed and you should amend your selection accordingly.

3. Click Save.

Deleting In-Transit Sites

To delete an In-Transit click the Delete button. You cannot delete an In-Transit Site with current transactions against it.

Note that you can click Clear at any point to clear your selection from the window.

2.2 Setting Up Sites for Inter-Site Transfers

To set up Sites for Inter-Site Transfers in the Inter-Site Details Maintenance window:

1. Enter a Site ID or select one using the lookup.

If you enter a Site that does not already exist then you will be asked if you want to create the Site. If you click Yes then the Site Maintenance window will be displayed.

Note that all sites can be set up for Inter-Site Transfers with the exception of sites that have been selected as In-Transit Sites.

2. Enter an Internal Creditor ID or select one using the lookup. The Internal Creditor ID is the Site **From** which Items will be transferred when you set up an Inter-Site purchase order.

If you select an Internal Creditor ID that has outstanding purchase orders against it, or it has been assigned as Internal Creditor to another Site, then you will not be able to make this selection and a warning will be displayed accordingly.



If you enter a Creditor ID that does not already exist then you will be asked if you want to create it. If you click Yes then the Creditor Maintenance window will be displayed.

Note that when creating an Internal Creditor ID it is recommended that the name is setup to be closely identifiable with the Site ID, for example:

Site ID	London
Internal Creditor ID	INTCREDLON
Name	Internal Creditor ID for London Site

3. Enter an Internal Debtor ID or select one using the lookup. The Internal Debtor ID is the Debtor ID that will be assigned to sales orders when you have entered an Inter-Site Transfer purchase order with this Site as the Site ID.



If you select an Internal Debtor ID that has outstanding sales orders against it, or that has been assigned as Internal Debtor to another Site, then you will not be able to make this selection and a warning will be displayed accordingly.

If you enter a Debtor ID that does not already exist then you will be asked if you want to create it. If you click Yes then the Debtor Maintenance window will be displayed.

Note that when creating an Internal Creditor ID it is recommended that the name is setup to be closely identifiable with the Site ID, for example:

Site ID	London
Internal Debtor ID	INTDEBTLON
Name	Internal Debtor ID for London Site

4. Enter an In-Transit Site ID or select one using the lookup. You can only select a Site that has been defined as an In-Transit Site.

When an IST sales invoice is posted from this Site ID then the stock will be transferred to this In-Transit Site until it is received into the Receiving Site.

5. Enter the Type ID or select one using the lookup. This is the Type ID that Inter-Site Transfer sales orders will be created with when they are automatically generated when the purchase order is released.

Note that it is recommended that for Inter-Site Transfers you create a new Sales Type ID and Invoice Type ID, for example, ISTORD and ISTINV in order to recognise them as internal documents.

6. If using eConnect to create Sales Orders enter the Batch ID to use. This is the default Batch ID and will be overridden if the Override Site Batch option is set on the [Inter-Site Transfers Setup window](#).
7. If using eConnect to create Sales Orders, select the Stock Shortage option to use when an inter-site sales order is created.
8. If using Nolan's SOP Import to create Sales Orders, enter a SOP Import ID. This must be an Import Definition ID that you have set up in the Nolan Business Solutions Import Definitions Maintenance window (see [Appendix C](#)).

Note that it may aid document storage if different SOP Import IDs are set up and assigned to each Site ID used for Inter-Site Transfers. This will retain site documents within Site-specific folders on your system.

9. Enter an In-Transit Account or select one using the lookup.
This will be linked to the sending Site ID. You must also enter this In-Transit Account as the Accrued Purchases account (see [Cards >> Purchasing >> Creditor](#)) for the Internal Creditor that will be transferring Items from this Site.
10. If you are using Process Server then click the expansion button to display the Report Destination window where you must select printing destinations for the Inventory Transaction Journal, Transaction GL Register and Cost Variance Journal. Once print destination options have been selected then the Process

Server Report Destinations for In-transit Inventory Transactions option will be checked.

11. Click Save.

Note that before making any Inter-Site Transfers, you should ensure that the relevant Item Numbers have been assigned to the Internal Creditor ID and the In-Transit Site. You will not be able to create an Inter-Site purchase order if the Item Numbers have not been assigned to these locations.

Deleting Inter-Site Details

To delete Inter-Site details click the Delete button. You cannot delete Inter-Site details where there are current Inter-Site transactions against the Site ID.

Note that you can click Clear at any point to clear your selection from the window.

3. Purchase Order Entry - Inter-Site Transfers

Transactions >> Purchasing >> Purchase Order Entry

Use the Purchase Order Entry window to:

- Enter purchase orders

Sending Site (Internal Creditor)

The Purchase Order Entry window

Receiving Site (Internal Debtor)

The Microsoft Dynamics™ GP Purchase Order Entry window has been given added functionality by the Inter-Site Transfers module to create purchase orders for Inter-Site Transfers. Inter-site purchase orders can also be generated automatically using the Microsoft Dynamics™ GP Generate Suggested Purchase Orders window.

Note that you cannot create inter-site purchase orders for Dual Quantity Catchweight Items that are Lot Controlled.

3.1 Creating Purchase Orders for Inter-Site Transfers

To create purchase orders for Inter-Site Transfers in the Microsoft Dynamics™ GP Purchase Order Entry window:

The purchase order should be entered following standard Microsoft Dynamics™ GP procedure. However several adapted procedures should be followed for Inter-Site Transfers.

1. The Type selected should be Standard. You cannot select the Type Drop-Ship for an Inter-Site Transfer.
2. The Creditor ID entered should be the Internal Creditor ID set against the Site (see [Setting Up Sites for Inter-Site Transfers](#)) **From** which you want to transfer Items.

3. Only Items on the Inventory can be added to an Inter-Site Transfer purchase order. Kit Items cannot be included on an Inter-Site transfer purchase order.
4. The Site ID selected should be the Site that you want to transfer Items **To**.

Note that:



You cannot select an In-Transit Site as the Site ID.

The Site selected (the receiving Site) cannot be the same Site as the Site to which the Internal Creditor ID on the purchase order has been assigned (the sending Site).

The Site selected must have been set up to incorporate Inter-Site Transfer functionality in the [Inter-Site Details Maintenance window](#).

When you have entered a Site ID, all other Item lines on the purchase order must have the same Site ID.

5. Click Save to save the purchase order.

Note that if you are viewing an Inter-Site Transfer purchase order that has been released, you can select Inter-Site Sales Orders under Additional to view the corresponding sales order in the Microsoft Dynamics™ GP Sales Transaction Enquiry Zoom window.



Also note that if you amend a purchase order, where it has been released and a corresponding sales order created, then a warning will be displayed indicating that you also need to amend the corresponding sales order.



If you attempt to amend a purchase order where the corresponding sales order has been transferred to invoice, you will receive a warning that the sales order has already been posted and the stock may not exist In Transit. It is highly recommended that you do not amend Inter-Site purchase orders where the corresponding invoice has been posted.

4. Edit Purchase Order Status window - Inter-Site Transfers



Transactions >> Purchasing >> Edit Purchase Orders

Use the Microsoft Dynamics™ GP Edit Purchase Order Status window to:

- Edit purchase order statuses

The Edit Purchase Order Status window

Item	Quantity Ordered	Quantity Canceled	Status
1GPROC	10	0	Released

When an Inter-Site Purchase Order is released using the Edit Purchase Order Status window, an Inter-Site Sales Order will be created in the Receiving site.

Note that the same functionality is achieved by printing the purchase order from the Microsoft Dynamics™ GP Purchase Order Entry window.

4.1 Releasing Purchase Orders for Inter-Site Transfers

To release purchase orders for Inter-Site Transfers in the Microsoft Dynamics™ GP Edit Purchase Order Status window:

1. If you want to create a corresponding sales order to your Inter-Site purchase order, you should set the Purchase Order Status to Released, then click Process. The purchase order will be processed and the sales order automatically generated.

If using the eConnect option to create Sales Orders any errors will be displayed in the tcs29 Inter-site processing – Error window (errors will be displayed in the Inet Processing window if using the Nolans SOP Import option).

If an error occurs, the purchase order will be reset to a status of new. No corresponding sales order will have been created. You should amend the purchase order to resolve the cause of error before re-releasing it.

2. If you amend the status of a line Item on the purchase order, where the sales order has already been created, then a warning will be displayed indicating that you should also amend the corresponding sales order.

Note that if you are viewing an Inter-Site Transfer purchase order that has been released, you can select Inter-Site Sales Orders under Additional to view the corresponding sales order in the Microsoft Dynamics™ GP Sales Transaction Enquiry Zoom window.

5. Sales Transaction Entry - Inter-Site Transfers

Transactions >> Sales >> Sales Transaction Entry

Use the Sales Transaction Entry window to:

- Enter a sales order

Sending Site
(Internal Creditor)

The Sales
Transaction
Entry window

Receiving Site
(Internal Debtor)

The Microsoft Dynamics™ GP Sales Transaction Entry window has been given added functionality by the Inter-Site Transfers module so that sales orders will be generated automatically when an Inter-Site purchase order is created.

All Items on Inter-Site sales orders will have the selling price and tax set to zero. The cost on the sales invoice will be set as standard.

Also note that you can follow standard Microsoft Dynamics™ GP procedures to generate purchase orders for back-ordered Items by clicking the Purchase button in the Sales Transaction Entry window. Any items that cannot be included on an automatically generated purchase order through this method will be displayed in the SOP P/Order I.S.T. Validation window.

If an Inter-Site sales order contains Lot Controlled Item Numbers, then the Lot Numbers will be automatically assigned to the order, regardless of whether you have selected to auto-assign Lot Numbers in the Microsoft Dynamics™ GP Sales Order Processing Setup Options window.

5.1 Processing Inter-Site Sales Orders

To process Inter-Site sales orders in the Microsoft Dynamics™ GP Sales Transaction Entry window:

Sales orders should be processed following standard Microsoft Dynamics™ GP procedure. However, several adapted procedures should be followed for Inter-Site sales orders.

1. All Inter-Site sales orders will be automatically generated when an Inter-Site purchase order is released. Use the Document No. lookup button in the Sales Transaction Entry window to select the required sales order document.

You cannot enter an Internal Debtor ID into a new sales order. Automatically generated sales order may be amended as detailed in Amending Inter-Site Sales Orders (see below).

2. The Internal Debtor on the sales order will be the Internal Debtor assigned to the Site ID selected in the Microsoft Dynamics™ GP Purchase Order Entry window.

The displayed Default Site will be the Site to which the Internal Creditor on the purchase order is assigned.

3. Transfer the sales order to an invoice following standard Microsoft Dynamics™ GP procedure.
4. Process the Invoice Batch following standard Microsoft Dynamics™ GP procedure in the Microsoft Dynamics™ GP Sales Batch Entry window. When you have posted the invoice the Item quantity on the invoice will automatically be transferred to the In-Transit Site selected in the Inter-Site Details Maintenance window.

Lot and Serial Numbered Items will have the Lot/Serial details created in the In-Transit Site as in the Site from which they are being sent. When Serial Numbered Items are transferred to the In-Transit Site an X will be added to the end of the serial number. This will be removed when the Item is in the Microsoft Dynamics™ GP Receivings Transaction Entry window.

Note that if you select to back-order some of the sales order quantity, then more than one invoice will be produced from the sales order. When you are receiving the invoice in the Microsoft Dynamics™ GP Receivings Transaction Entry window you can view and select available In-Transit records using the m-hance Myridas In-Transit Receipts window.

Note that you can select Inter-Site Purch Orders under Additional to view the corresponding purchase order in the Microsoft Dynamics™ GP Purchase Order Enquiry Zoom window. This option is also available from the Sales Transaction Enquiry Zoom window.

5.2 Amending Inter-Site Sales Orders

To amend Inter-Site sales orders in the Microsoft Dynamics™ GP Sales Transaction Entry window:

Sales order amendments should be performed following standard Microsoft Dynamics™ GP procedure. However, several adapted procedures should be followed for Inter-Site sales orders.



1. If you amend an Inter-Site sales order, a warning will be displayed that you should also amend the corresponding purchase order. The purchase order will not be amended automatically.
2. If you add line Items to an existing Inter-Site sales order then the same warning will be displayed. However, Kit Items and Non-Inventoried Items cannot be added to the sales order.



3. You can delete an Inter-Site sales order using the Delete button. A warning will be displayed that you should also delete the corresponding purchase order.

Note that if you have already cancelled the purchase order then this warning will not be displayed.

Also note that you cannot amend an Inter-Site **purchase orders** once the sales order has been transferred to an invoice.

6. Receiving Transaction Entry - Inter Site Transfers



Transaction >> Purchasing >> Receiving Transaction Entry

Use the Receiving Transaction Entry window to:

- Receive a Shipment

The Receiving Transaction Entry window

Sending Site (Internal Creditor)

Receiving Site (Internal Debtor)

PO Number	Creditor Item	Qty Shipped	Unit Cost	Extended Cost
PO2089	24x IDE	10		\$450.00
Each	NORTH	10		\$450.00
	24x CD-ROM	10		0
		0.00		\$0.00
		0.00		\$0.00
		0.00		\$0.00
1099 Amount			\$0.00	
Payment Terms				
Landed Cost Func. Total			\$0.00	
Subtotal				\$450.00
Trade Discount				\$0.00
Freight				\$0.00
Miscellaneous				\$0.00
Tax				\$0.00
Total				\$450.00

The Microsoft Dynamics™ GP Receiving Transaction Entry window has been given added functionality by the Inter-Site Transfers module so that Inter-Site Transfers can be received.

Note that the Extended Cost will be calculated by multiplying the Unit Cost by the Quantity Shipped (and where appropriate the Unit of Measure value).

Also note that from the Goods Received Enquiry window you can select Additional >> Inter-Site Sales Document Enquir to view originating sales invoices in the Sales Document Enquiry Zoom window.

6.1 Receiving Inter-Site Sales Orders

To receive Inter-Site orders in the Microsoft Dynamics™ GP Receiving Transaction Entry window:

Inter-Site receivings transactions should be processed following standard Microsoft Dynamics™ GP procedure. However, several adapted procedures should be followed for receiving Inter-Site sales orders.



1. The total amount received in the transaction cannot be greater than the quantity currently available in the In-Transit Site/Purchase Order combination. If you enter a quantity greater than that available then a warning message will be displayed and the quantity will be defaulted to the greatest available quantity.

Note that the Site ID and Unit of Measure cannot be amended once you have selected a Creditor Item.

2. The sales order may have been split into more than one invoice. This would lead to more than one In-Transit Receipt record. When you enter the Creditor Item, if there is more than one In-Transit Receipt record held against the selected purchase order, then the In-Transit Receipts window will be displayed when you tab off the Quantity Shipped field.

The In-Transit Receipts window

PO Number	Original Quantity	Quantity Left On Receipt
PO1061	5	5
PO1061	5	5

Click Select to select the In-Transit Receipt line to enter into the receivings transaction. The quantity left on each In-Transit receipt will be displayed. You cannot enter more than this quantity on each receipt line.

Note that more than one line can be entered into the receivings transaction, so that all invoiced lines can be entered into the same receivings transaction.

Also note that if you are receiving Lot/Serial Numbered Items you will need to enter details through the Lot Number Entry or Serial Number Entry windows.

6.2 Auto-Receiving Inter-Site Transfers

Inter-Site Transfers can also be received by clicking the Auto-Rcv button and following standard Microsoft Dynamics™ GP procedure. All valid lines will be receipted; lines will not be receipted and a warning displayed where there is not enough stock in the In-Transit Site for the transaction line or there is more than one receipt for the purchase order/item number combination.

Note that you can click the Auto-Rcv button prior to entering a creditor ID in the Receiving Transaction Entry window. However internal purchase orders cannot be selected in the Select Purchase Orders window.

7. Lot Number Select window



Transactions >> Purchasing >> Receiving Transaction Entry >> Qty Shipped Expansion button

Use the Lot Number Select window to:

- Enter receivings details of Lot Controlled Inter-Site Transfers

The Lot Number Entry window

Note that the window will display either Creditor Item or Item Number, depending on the Options selected in Receiving Transaction Entry window.

Also note that this functionality is also available through the Microsoft Dynamics™ GP Receiving Item Detail Entry window.

7.1 Entering Receiving Details for Lot Controlled Inter-Site Transfers

To enter receivings details for Lot Controlled Inter-Site Transfers in the Lot Number Select window:

The Lot Number Select window will be displayed automatically when you tab off the Qty Shipped field in the Receiving Transaction Entry window, or when you click the Qty Shipped Expansion button (where you are entering a receipt for Lot Controlled Items). Available Lots for the selected receiving line will be displayed in the Lot Numbers For Receipt scrolling window.

Note that new Lot Numbers cannot be selected for Inter-Site Transfers, you must receive the displayed Lot Numbers that the Items are assigned to.

1. Click on a Lot Number in the Lot Numbers For Receipt scrolling window.
The Quantity field will display the quantity in this Lot Number that is left to allocate.
2. In a multi-bin environment, enter the bin where the stock will be received.
This takes its default value from the default Goods Received bin for the site.
3. Click Insert to add the Lot Number to the Selected scrolling window. The full quantity assigned to the Lot Number (or the Remaining To Select quantity if this is less than the quantity left in the selected Lot Number) will be transferred to the Quantity Selected scrolling window.

Note that if you do not want to receive the full quantity against a specified Lot Number then enter the quantity you require into the Quantity field then Insert the Lot Number as per step 2. However, the Quantity Selected must equal the Item's Extended Quantity before you can move to the next line Item in the Receivings Transaction Entry window or the Receivings Item Detail Entry window.

You cannot Insert a quantity that is greater than the Remaining To Select Quantity.

Alternatively you can click the Insert All button. Lots will be automatically allocated until the quantity remaining has been fulfilled.

4. Continue Inserting Lot Numbers for the Item as required.
If you want to remove a Lot Number from the Lot Numbers Selected scrolling window select it then click Remove. You can remove all Lot Numbers by clicking Remove All.
5. Choose OK to return to the Receivings Transaction Entry window.



Note that if you have entered a total quantity that is less than the Remaining To Select quantity, a warning will be displayed when the window closes and you will be unable to complete the receivings transaction.

Serial Tracked Items). Available Serial Numbers for the selected receiving line will be displayed in the Serial Numbers For Receipt scrolling window.

Note that new Serial Numbers cannot be selected for Inter-Site Transfers, you must receive the displayed Serial Numbers that the Items are tracked by.

1. In a multi-bin environment, enter the bin where the stock will be received. This takes its default value from the default Goods Received bin for the site.
2. Click on a Serial Number in the Serial Numbers For Receipt scrolling window. Click Insert to add the Serial Number to the Serial Number Selected scrolling window.

Note that the Serial Numbers Selected should equal the Extended Quantity before you can move to the next line Item in the Receivings Transaction Entry window or the Receivings Item Detail Entry window.

3. Continue Inserting Serial Numbers for the Item as required.

If you want to remove a Serial Number from the Serial Numbers Selected scrolling window select it then click Remove. You can remove all Serial Numbers by clicking Remove All.

4. Choose OK to return to the Receivings Transaction Entry window.



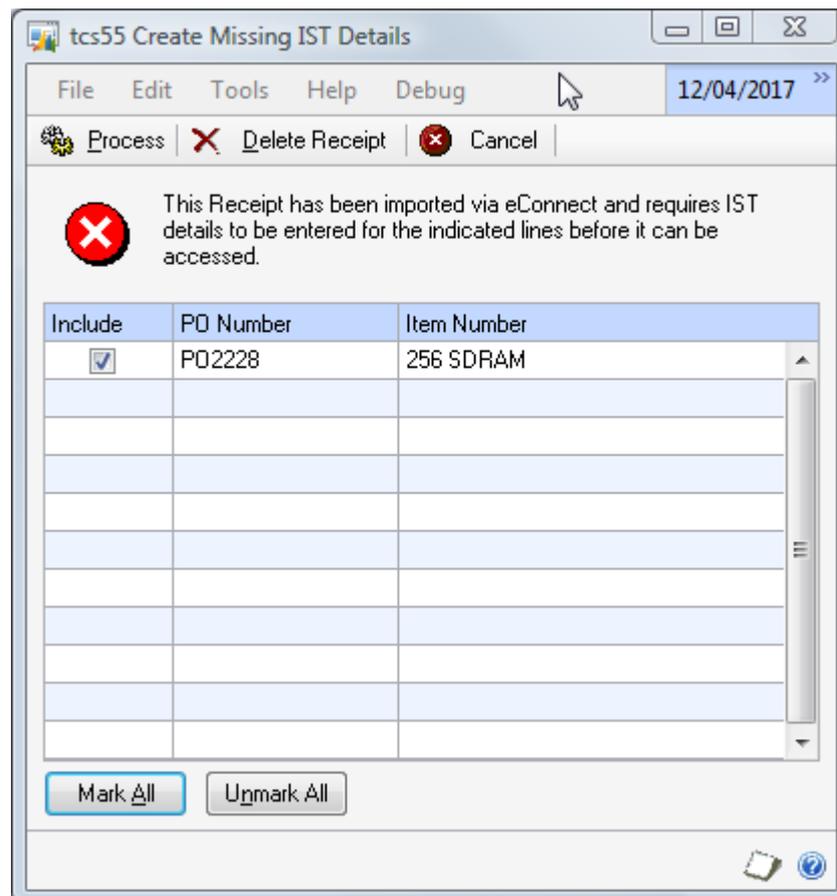
Note that if the total quantities of the Serial Numbers Selected is less than the Remaining To Select quantity, a warning will be displayed when the window closes and you will be unable to complete the receivings transaction.

9 Validating Imported Receipts

If Receiving Transactions for Inter-Site Purchase Orders are imported using econnect or another integration tool, the associated inter-site transfer tables may not be updated.

If you have selected the IST Receipt Validation option in the [Inter-Site Transfers Setup window](#), the inter-site transfer tables will be checked for required updates when you open an inter-site POP Receiving Transaction in the Receiving Transaction Entry window.

If the inter-site transfer tables have not been updated, the Create Missing IST Details window will be displayed, showing the receipt lines which require updates.



Select Mark All and Process to validate and update the Receipt.

The receipt cannot be edited or posted until this process is complete. You can delete the receipt by using the Delete Receipt button on the Create Missing IST Details window.

Some lines may require the entry of additional details, e.g lot numbers, in which case the appropriate window will be opened. Any lot numbers or serial numbers created by the integration will be discarded.

Some lines on the receipt may not be valid inter-site transfer receipts, in which case the appropriate updates cannot be performed. In this situation, the quantity on the line will be set to zero.

10. Posting Inter-Site Transfer Receipts

Receipts for Inter-Site Transfers can be posted as Batches through the Microsoft Dynamics™ GP Purchase Series Posting window or by clicking the Post button in the Receiving Transaction Entry window.

Posting a receipt will transfer the received Items from the In-Transit Site to the Internal Debtor Site.

Note that when you post an In-Transit receipt the record of the transaction should be returned to zero in the In-Transit Account (see [Setting Up Sites for Inter-Site Transfers](#) and Microsoft Dynamics™ GP Help for further details).

Once the entire quantity on the originating order has been receipted, the purchase order will automatically be set to the status of closed.

Appendix A

Inter-Site Transfers - Access to Windows

Inter-Site Transfers

Window Name	 Menu Access	 Other Access
Create Missing IST Details		Transactions >> Purchasing >> Receivings Transaction Entry >>select a receipt with missing IST details
Inter-Site Details Maintenance	Tools >> Setup >> m-hance >> Inter Site Transfers >> IST Site Setup	Site Maintenance >> Additional >> Inter-Site Setup Debtor Maintenance >> Additional >> Inter-Site Setup Creditor Maintenance >> Additional >> Inter-Site Setup
Inter-Site Transfers Setup	Tools >> Setup >> m-hance >> Inter Site Transfers >> Inter Site Transfer Setup	
In-Transit Receipts	Transaction >> Purchasing >> Receivings Transaction Entry >> tab off Qty Shipped field (when there is more than one In-Transit receipt for the line Item)	
Lot Number Select	Transactions >> Purchasing >> Receivings Transaction Entry >> Qty Shipped Expansion button (where the Item is Lot Controlled)	
Serial Number Select	Transactions >> Purchasing >> Receivings Transaction	

	Entry >> Qty Shipped Expansion button (where the Item is Serial Tracked)	
--	-----------------------------------------------------------------------------------	--

Appendix B

Integration with eConnect

In order to use eConnect to create Inter-Site Sales Orders, an additional application must be installed.

This is the TCS.Myridas.V12.Extensions application.

To install, run the TCS.Myridas.V12.Setup.msi installation package which you will find in C:/Program Files/Myridas Setup/Runnable System/Additional Components/Myridas Extensions or similar, depending on the location of your Myridas installer.

This should be installed on each machine running a GP client.

In addition, Dynamics GP eConnect must be installed and the eConnect integration service must be started. See Microsoft Dynamics GP documentation for further details.

Appendix C

Integration with Nolan Business Solutions SOP Import

In order to use Nolans SOP Import to create Inter-Sales Orders, the Nolans SOP Import product must be installed.

For further information on installing Nolans SOP Import please refer to the Nolan Business Solutions Sales Order Import documentation.

Before setting up Inter-Site Transfers, use the Import Definitions Maintenance window to create an Import Definition ID.



Cards >> Sales >> SOP Import >> Import Definitions

To set up Import Definitions in the Nolan Business Solutions Import Definitions Maintenance window:

1. Enter an Import Definition ID or select one using the lookup.
2. Enter an Import Description.
3. Enter Immediate as the **Import Type**.
4. Select the Import Format as SOP Import v2.0 from the drop-down menu. Do not select the Import from SQL tables option.
5. Enter the Import, Save and Reject Filenames as required.

Note that for the Import you need only enter a Folder location - a File and Filename will be created automatically.

For example:

Import Filename: :C:Users/gpuser/Documents/importfiles

Save Filename: :C:Users/gpuser/Documents/importfiles/savefile.txt

Rejects Filename: :C:Users/gpuser/Documents/importfiles/rejectfile.txt

6. Under Import Files select Never Delete.
7. Under Error Handling select "Reject whole import file" from the drop-down menu.

Selecting this option will mean that where you attempt to Process an Inter-Site purchase order that contains errors, the whole transaction will be rejected

8. Enter an Import Batch. This is the Batch ID that imported sales orders will be created in, unless you select the Override SOP Import Batch option in the [Inter-Site Transfers Setup window](#).
9. Click the Options button and specify the Date Format Mask (e.g. ddmmyyyy) and the Shortage option that should be used for your Inter-Site Sales Orders.
10. Click OK to close the Options window.
11. Click Save.

For further information please refer to the Nolan Business Solutions SOP Import documentation.

Appendix D

About Myridas



Help >> About Microsoft Dynamics GP >> Additional >> About m-hance Myridas Suite

Use the About m-hance Myridas Suite window to check your registration information and installation details. The window will tell you which Myridas modules you are registered to use and which have been installed on your system.

The About m-hance Myridas Suite window

The screenshot shows the 'About m-hance Myridas Suite' window with the following sections:

License Information

Company Name	m-hance Limited			<input type="button" value="Edit Keys"/>
Max Users	99			
Key 1	31JDHN30HQQRSTUVIL26YIZY2628XTZ0	Key 2	JJIIG28TSRQXWXX29VSYUUSQ260	
Key 3	ILKNMP30STQRWXYVYV28TMU29WVW3	Key 4	PNMZ262726VUXWRIBBU30R28LL31L1	
Key 5	29M31YZ2627BIPEIAHQ30RXMU0			Required Key Version: 12

Installation Details

Company ID	Fabrikam, Inc.		
Installer Version	12.0.0	Dictionary Build	12.0.0.0
		Myridas Extensions	12.0.0.0

Module	Registered	Installed
Additional Charges	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Adv. Inventory Replenishment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Automated Data Capture	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Call Scheduling	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Catalogue Based Sales	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Catchweights	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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