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Stock transfer shipment advices

Suppliers use warehouse stock transfer shipment advices to send notice from one remote or third-party warehouse to another that the product they are transferring has been shipped from their warehouse location to the receiving warehouse.

# Create and submit stock transfer shipment advices

Perform this task to create and submit stock transfer shipment advices.

Additionally, clients can begin work on a stock transfer shipment advices and save it for completion at a later time.

# Create and submit a new stock transfer shipment advices

- 1. Select a [MPL Network] from the Network drop-down in the header.
- 2. Select a Team (e.g. your entire company or a Link to a specific Partner or internal location) in the header.
- 3. Select Logistics Client from the left menu.

Partners must have the correct roles assigned if using the Owner's instance of Multienterprise Information Network Tower.

- 4. Select Stock Transfer Shipment Advices.
- 5. Select the New button.
- 6. Enter the delivery number in the Stock Transfer Order Number field.



7. Select the Save button.

The screen refreshes with the saved stock transfer shipment advice in the draft state and with the required sections populated.

- 8. Select the Edit button.
- 9. In the Transaction Information section, select Submitted from the Process Status drop drown.
- 10. In the Shipment Information section fill in the following fields:
  - a. Stock Transfer Order Number field A unique identifier number of a stock transfer shipment advice. This field auto populates the value entered in New Stock Transfer Shipment Advice screen.
  - b. Stock Transfer Reporting Code drop-down The unique identifier used to track and report the movement of stock between different locations or warehouses.
  - c. Stock Transfer Order Date field The date when the stock transfer order was created or processed in the client's ERP system. This date indicates when the decision was made to move stock between different locations or plants.
  - d. Inventory Movement Type drop-down The different types of inventory transactions or movements within a warehouse.
  - e. Shiped Date/Time switch The date and time the goods are shipped.
  - f. Transfer Priority field The level of urgency assigned to a stock transfer or movement request.
  - g. Estimated Delivery Date/Time field The date and time on which a shipment is expected to deliver.
  - h. Shipment Type field The type of shipment used for transportation.
  - i. Warehouse Identifier field The unique identifier of the warehouse.
  - j. Transportation Group field The categorization used to group together

goods or products that share similar transportation requirements.

- k. Action field A description stating the purpose of the transaction.
- 11. In the Carrier Information section, fill in the following fields:
  - a. Transport Method drop-down The transportation method used.
  - b. Transportation Equipment Type drop-down The specific type of vehicle or container used for transporting goods. (e.g. trucks, trailers)
  - c. SCAC drop-down A carrier identifier code for the routing stage.
  - d. Equipment Initial field A prefix assigned to transportation equipment.
  - e. Carrier Name field The name of the transportation company.
  - f. Equipment Number field A unique identifier assigned to a transportation equipment.
  - g. Payment Method field The method of payment for delivery.
- 12. In the Reference Transaction section:
  - a. Select the Add + icon. At least one reference transaction line item is required to submit a stock transfer shipment advices.
  - b. In the Reference Transaction panel, fill in the following fields:
    - i. Transaction Type drop-down The type of transaction used.
    - ii. Transaction Value type-ahead field The unique identifier of the transaction.

If the value does not match the available options, the value must be entered manually.

- iii. Transaction Date field The start date of the transaction.
- c. Select Apply.
- 13. In the Client and Provider section, fill in the following fields under Client group:
  - a. Company type-ahead field The name of the supplier who will send the stock transfer shipment advice. This field pulls from the Owner's company and location master data.

The remaining Client fields are auto populated with the values from the company or location's master data entry. If the name of the supplier is

not present in the Owners master data, the supplier name must be entered manually.

- b. Address 1 field The address of the particular location.
- c. Address 2 field Any additional address information.
- d. Country drop-down The two-letter country code with country name for this location.
- e. State field The state or region for this location.
- f. City field The city for this location.
- g. Postal Code field The postal code for this location's main address.
- h. Contact Telephone Number field The company or location's phone number.
- i. Contact Fax Number field The company or location's fax number
- j. Party ID Type drop-down The identifier type used for this company or location.
- k. Party ID Value field The value associated with the identifier type.
- 14. In the Client and Provider section, fill in the following fields under Provider group:
  - a. Company type-ahead field The name of the logistics provider who will receive the stock transfer shipment advice. This field pulls from the Owner's company and location master data.

The remaining Provider fields are auto populated with the values from the company or location's master data entry. If the name of the logistics provider is not present in the Owners master data, the vendor name must be entered manually.

- b. Address 1 field The address of the particular location.
- c. Address 2 field Any additional address information.
- d. Country drop-down The two-letter country code with country name for this location.
- e. State field The state or region for this location.

- f. City field The city for this location.
- g. Postal Code field The postal code for this location's main address.
- h. Contact Telephone Number field The company or location's phone number.
- i. Contact Fax Number field The company or location's fax number
- j. Party ID Type drop-down The identifier type used for this company or location.
- k. Party ID Value field The value associated with the identifier type.
- 15. In the Ship From Location and Ship To Location section, fill in the following fields under Ship From Location group:
  - a. Location type-ahead field The billing address of the buyer. This field pulls from the Owner's company and location master data.
    The remaining Ship From Location of the Supplier fields in the section are auto populated with the values from the company or location's master data entry. If the billing address is not present in the Owners master data, the ship from location must be entered manually.
  - b. Address 1 field The address of the particular location.
  - c. Address 2 field Any additional address information.
  - d. Country drop-down The two-letter country code with country name for this location.
  - e. State field The state or region for this location.
  - f. City field The city for this location.
  - g. Postal Code field The postal code for this location's main address.
  - h. Contact Telephone Number field The company or location's phone number.
  - i. Contact Fax Number field The company or location's fax number
  - j. Party ID Type drop-down The identifier type used for this company or location.
  - k. Party ID Value field The value associated with the identifier type.

16. In the Ship From Location and Ship To Location section, fill in the following

fields under Ship to Location group:

- a. Location type-ahead field The billing address of the buyer. This field pulls from the Owner's company and ship to location master data.
  The remaining Ship To Location fields in the section are auto populated with the values from the company or location's master data entry. If the billing address is not present in the Owners master data, the ship to location must be entered manually.
- b. Address 1 field The address of the particular location.
- c. Address 2 field Any additional address information.
- d. Country drop-down The two-letter country code with country name for this location.
- e. State field The state or region for this location.
- f. City field The city for this location.
- g. Postal Code field The postal code for this location's main address.
- h. Contact Telephone Number field The company or location's phone number.
- i. Contact Fax Number field The company or location's fax number
- j. Party ID Type drop-down The identifier type used for this company or location.
- k. Party ID Value field The value associated with the identifier type.
- 17. In the Stock Transfer Shipment Advice Summary section, fill in the following fields
  - a. Summary Type drop-down The description of the stock advice shipment advice.
  - b. Summary Value field The value of the stock advice shipment advice.
  - c. Summary Value Unit field The unit value of stock advice shipment advice.
- 18. In the Line Items section:
  - a. Select the Add + icon. At least one line item is required to submit a stock transfer shipment advice.



- b. In the New Line Items panel, fill in the following fields underItem Information:
  - i. Line field The number to identify the line item by (e.g. 50).
  - ii. Item field The name of the product. If the user enters an item code instead, the field automatically displays the corresponding item name.

The Item Code Type, Item Code Value and Description fields are auto populated with the values from the Owner's product master data entry for the product. If the product name is not present in the Owner's product master data then the product name must be entered manually.

- iii. Item Code Type drop-down The product code type (e.g. IN-Product Code).
- iv. Item Code Value field The product code.
- v. Description field A brief description of the product. If the description is not present in the Owners product master data then the description must be entered manually.
- vi. Lot Number field The lot number for the line item.
- vii. Expiration Date field The expiry date of the line item.
- viii. Quantity Shipped field The number of units shipped.
- ix. Unit of Measure drop-down The unit in which the line item is measured.
- x. Line Notes field Additional information about the line item being added.
- c. Select Apply.

The new line item is added to the stock transfer shipment advice.

- d. Select the line item row and then select the branch 🖧 icon and fill in the following fields under Packing Information:
  - i. Pack Size field The size or capacity of the packing used for storing or transporting goods.

- ii. Number of Units in Pack field The number of units contained within a single package.
- iii. Unit of Measure drop-down The unit in which the packing is measured.
- e. Select Apply.

The packing information is added to the line item.

- f. Select the line item row drop down to view the packing information in a table.
- 19. In the Notes section, enter any additional comments or instructions.
- 20. To submit the stock transfer shipment advice:

To save the stock transfer shipment advice in a Draft state and finish it

later, ensure the Move To button is not selected and then select the Save

🖹 Save

button in the draft state.

a. Select the Move To button at the top of the screen.

The submit status indicator circle is filled in with green to indicate the desired action upon selecting save.

b. Select the Save button.

The stock transfer shipment advice is submitted.

# Tips

- Select the Add + icon, to add a new line item, where available.
- Select the Delete icon, to remove an individual line item, where available.



- Select the branch 🖧 icon, to add a new line item in the inserted table, where available.
- New stock transfer shipment advices can also be created by selecting the
   New + New button on the Stock Transfer Shipment Advices Details screen for an existing stock transfer shipment advice.

### Submit a draft stock transfer shipment advice

Complete and submit a saved stock transfer shipment advice in the draft state.

- 1. Select a [MPL Network] from the Network drop-down in the header.
- 2. Select a Team (e.g. your entire company or a Link to a specific Partner or internal location) in the header.
- 3. Select Logistics Client from the left menu.

Partners must have the correct roles assigned if using the Owner's instance of Multienterprise Information Network Tower.

- 4. Select Stock Transfer Shipment Advices.
- 5. Select the Filter button to find stock transfer shipment in Draft state.
- 6. Select Stock Transfer Order Number link in the results table.
- 7. Select the Edit button.
- 8. In the Transaction Information section, select Submitted from the Process Status drop drown.
- 9. Confirm the stock transfer shipment advice details and select the Edit  $\mathbf{E}$  icon associated with that line item to modify the fields if required.
- 10. Select the Move To button at the top of the screen.

The submit status indicator circle is filled in with green to indicate the desired



action upon selecting save.

11. Select the Save

button.

The stock transfer shipment advice is submitted.

## Tips

 Select the shipping advice number row and then select the Delete icon on the top of the screen, to delete a stock transfer shipment advices in draft state.

A deleted transaction cannot be retrieved.

# Search and view stock transfer shipment advices

## Search for and view stock transfer shipment advices

Perform this task to search for stock transfer shipment advice sent by buyers or sellers to view the details. Viewing the details of a stock transfer shipment advice enables buyers or sellers to quickly access order information (e.g. the quantity for each line item in an order) in TraceLink without having to search through the actual B2B message.

- 1. Select a [MPL Network] from the Network drop-down in the header.
- 2. Select a Team (e.g. your entire company or a Link to a specific Partner or internal location) in the header.
- 3. Select Logistics Client or Logistics Provider from the left menu.

Partners must have the correct roles assigned if using the Owner's instance of Multienterprise Information Network Tower.

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- 4. Select Stock Transfer Shipment Advices.
- 5. Select the Filter **Filter** button.
- 6. In the Filters panel, fill in one or more of the following fields to filter the results:
  - a. State drop-down The state of the stock transfer shipment advice:
    - Draft The transaction is in the draft state.
    - Submit The transaction has been created.
    - Processing The application is getting ready to handle incoming transactions by doing some initial tasks, such as copying the files it receives.
    - Processed The application changes the standard information into a format that is easy to use and specific to your transaction.
    - Preparing to Send The application is getting ready to send out a transaction and is doing some initial tasks, like copying the necessary information for the process.
    - Sending –The application sends out business transactions to the buyer or supplier.
    - Sent The transaction is successfully completed and shared with the receiving party.
  - b. Provider type-ahead Displays only if the menu item is Sent Stock
     Transfer Shipment Advices. The name of the company the stock transfer
     shipment advice was sent to.

If the name of the company is not present in the Owners master data then the company's name must be entered manually.

c. Client type-ahead – Displays only if the menu item is Received Stock
 Transfer Shipment Advices. The name of the company the stock transfer
 shipment advice was sent to.

If the name of the company is not present in the Owners master data then the company's name must be entered manually.

- d. Stock Transfer Order Number field A unique identifier or reference number associated with a stock transfer shipment advice.
- e. Stock Transfer Order Date field The date of stock transfer order was created.
- f. Shipped Date/Time field The date and time when goods were shipped.
- g. Last Modified field The period of time in which the stock transfer shipment advice was last updated:
  - Today The transaction was modified within the last few hours.
  - Yesterday The transaction was updated within the past 24 hours.
  - Last Week The transaction was modified in the last 7 days.
  - Last Month The transaction was modified in the last 30 days.
  - Last 3 Months The transaction was modified in the last 90 days.
  - Last 6 Months The transaction was modified in the last 180 days.
  - Custom Range Select a specific period of time that the transaction was modified in from the calendar.
- 7. Select Apply.

A list of stock transfer shipment advices displays based on the filter results.

8. Select the link for the stock transfer shipment advice from the results table.

The View Stock Transfer Shipment Advices screen displays.

9. To view all fields for each line item, select the View 🕏 icon on the Stock Transfer Shipment Advices Details screen.

# Reprocess and resubmit view stock transfer shipment advices

## **Reprocess stock transfer shipment advices**



After the stock transfer shipment advice is submitted, the user might encounter an error and the processed status will be set to Paused With Error. Use the following procedure to resolve any error messages encountered while submitting stock transfer shipment advices.

- 1. Select a [MPL Network] from the Network drop-down in the header.
- 2. Select a Team (e.g. your entire company or a Link to a specific Partner or internal location) in the header.
- 3. Select Logistics Client from the left menu.

Partners must have the correct roles assigned if using the Owner's instance of Multienterprise Information Network Tower.

- 4. Select Stock Transfer Shipment Advices.
- 5. Select the Filter button to find stock transfer shipment in Processing, Processed, Preparing to Send, or Sending state.
- 6. Select Stock Transfer Order Number link in the results table.
- 7. View the following fields for error in the Transaction Information section:
  - $\,\circ\,$  Process Status Displays the status of the submitted transaction.
  - Last Transaction Error Displays the error message.
- 8. Select the Edit button..
- 9. In the Transaction Information section, select Submitted from the Process Status drop drown.
- 10. Select the Save button.

The stock transfer shipment advices request is moved from Processing state to Sending state indicating that the stock transfer shipment advice is submitted successfully.

▲ Do not select the Move To button, as it will cause the transaction to skip a workflow state, preventing successful delivery.

# Resubmit stock transfer shipment advices

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If a transaction is successfully sent to a partner but an issue occurs on the partner's side (e.g. in their ERP system), the sender can avoid re-entering all the details by rolling back to a previous workflow state and resending the transaction, thus saving time and effort for both parties.

- 1. Select a [MPL Network] from the Network drop-down in the header.
- 2. Select a Team (e.g. your entire company or a Link to a specific Partner or internal location) in the header.
- 3. Select Logistics Client from the left menu.

Partners must have the correct roles assigned if using the Owner's instance of Multienterprise Information Network Tower.

- 4. Select Stock Transfer Shipment Advices.
- 5. Select a Stock Transfer Order Number in Sent state.
- 6. Select the Edit button.

The state of the stock transfer shipment advice is automatically moved to Sending state.

7. Select the Move To button at the top of the screen.

The submit status indicator circle is filled in with green to indicate the desired action upon selecting save.

8. Select the Save button.

The stock transfer shipment advice is submitted.

The statues of the stock transfer shipment advice moves to Sent state.

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The OPUS Ensemble user experience allows you to switch between companies or environments that you have access to with the same user account (identified by an email) without logging into a separate URL.

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#### Navigate to help documentation and support

Select the Help Center icon in the header to access the one-stop-shop help center for everything related to the network you are currently within (e.g.

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