In-Transit Transfers (Picking & Receiving)

Cavallo Support - 2025-06-26 - Miscellaneous

In-transit transfers (*ITTs*) can be fulfilled and received within DataCollection iOS and Android, as of DataCollection version 4.5.3.0 (*and above*).

Note: Currently, this functionality is only available on DataCollection iOS and Android; it is not available on DataCollection for Windows Mobile at this time

This document will go over the setup needed to utilize the In-Transit Transfer functionality within DataCollection. It will also go over both of the processes, covering each step taken when picking/receiving an In-Transit Transfer with DataCollection.

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In-Transit Picking

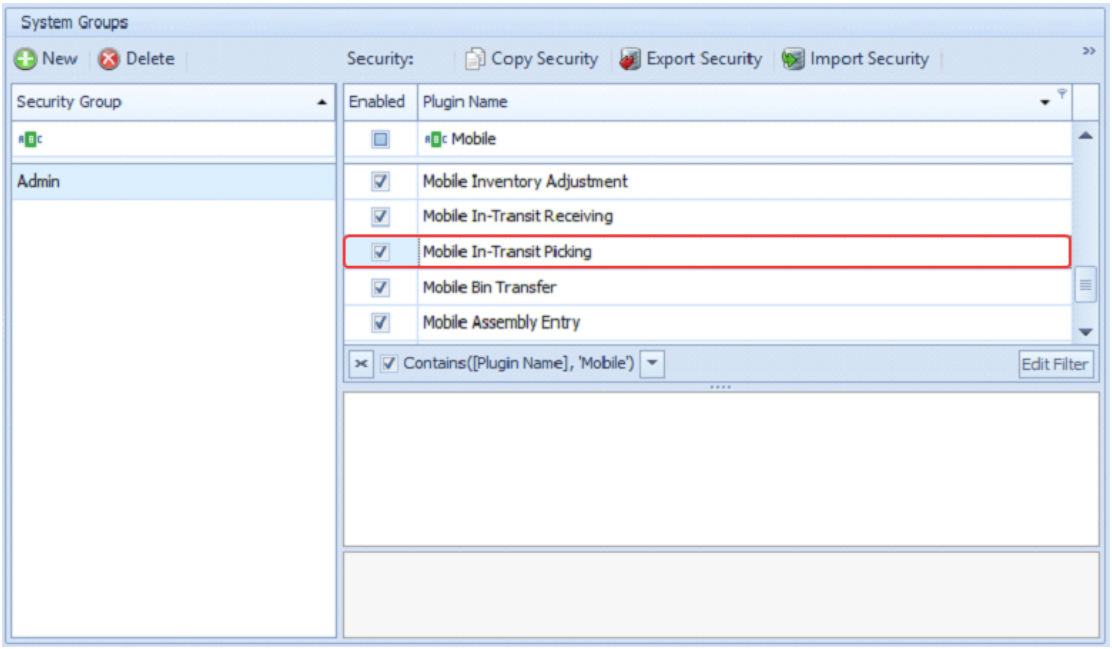
Overview

In-transit transfers (ITTs) can be fulfilled and received within DataCollection iOS and Android. This documentation will cover the setup and use of the ITT fulfillment process via the In-Transit Picking screen, where users can fulfill serial, lot and non-tracked items from the From site to the Via site. The From site inventory is removed when it is shipped in Microsoft Dynamics GP.

Setup

Before using the 'In-Transit Picking' screen on DataCollection, verify that the “Mobile In-Transit Picking” security is enabled in the Security Editor on DataCollection Console for each security group that should have access to the screen. You can quickly access this security from the list by searching “Mobile”. Once you have verified that it is enabled, save any changes you may have made.

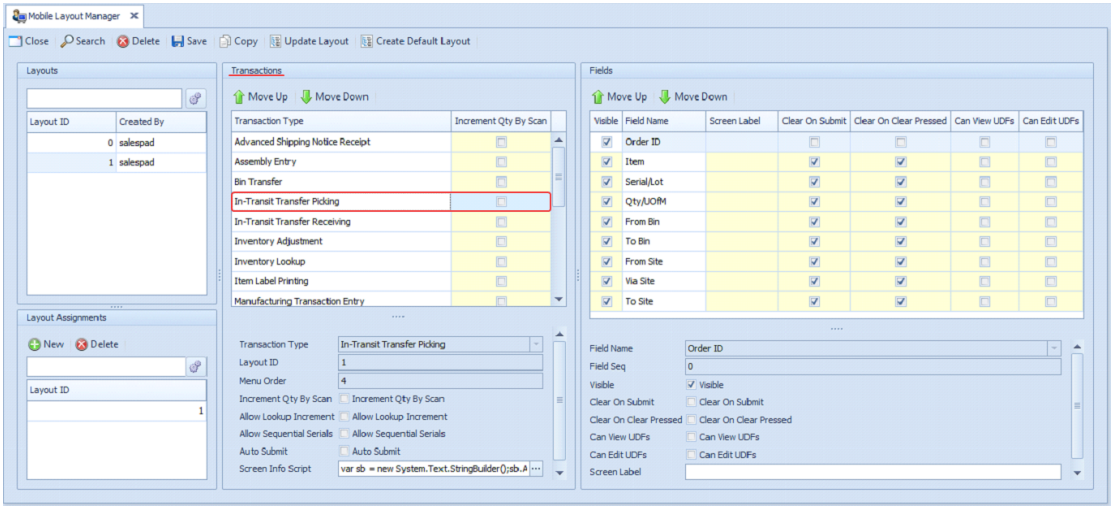
Note: There are no sub-securities for this module



Next, you'll need to make sure the current mobile layout manager is updated to include the 'In-Transit Picking' screen in the main menu on the device.

Select the 'Setup' tab in the DataCollection Console, then click 'Mobile Layout Manager'. Once you see the layout manager, click the 'Search' button to refresh the layouts section. Note that the Layout ID of "0" is reserved for the read-only default template, select this first, click the "Update Layout" button, then click "Search" again to reload the list.

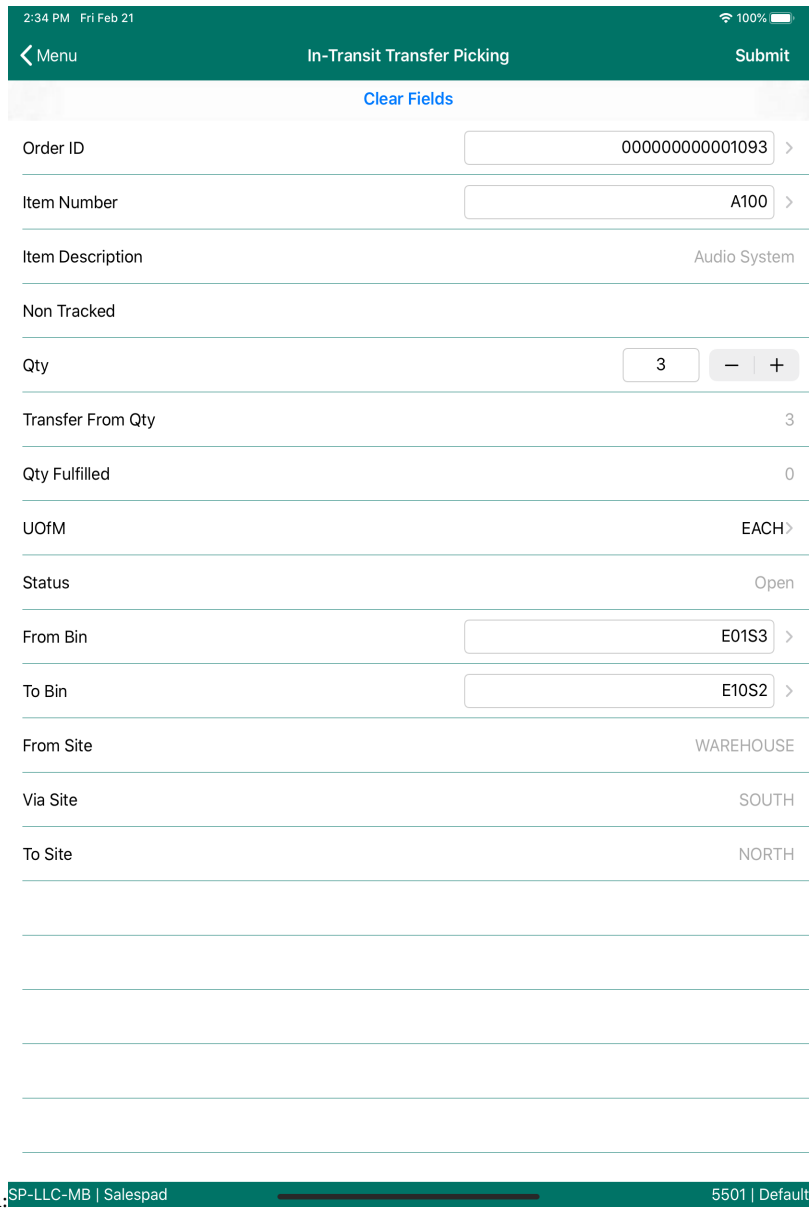
For every following layout, select the layout and click the 'Update Layout' button to refresh the possible transaction types for that specific layout ID. Review the layout's 'Transactions' list, verifying that 'In-Transit Transfer Picking' has appeared, then rearrange the list as desired to determine where it will appear on the device. Select the 'In-Transit Transfer Picking' transaction to update its properties, and review the 'Fields' list to rearrange the visible field order and update their properties. Make sure to update every layout, and save before exiting.



If 'In-Transit Transfer Picking' does not appear in the 'Transactions' list after clicking the "Update Layout" button, verify that your current build supports this new functionality. If you are using a compatible build, but you still do not see this option, please contact SalesPad Support for assistance.

Usage

After you've gone through the Setup section, the 'In-Transit Picking' screen will be available as an option within the main menu of DataCollection iOS and Android. Tapping on this new module will lead you to the following



screen:

Here are some quick descriptions of each of the fields displayed on this screen:

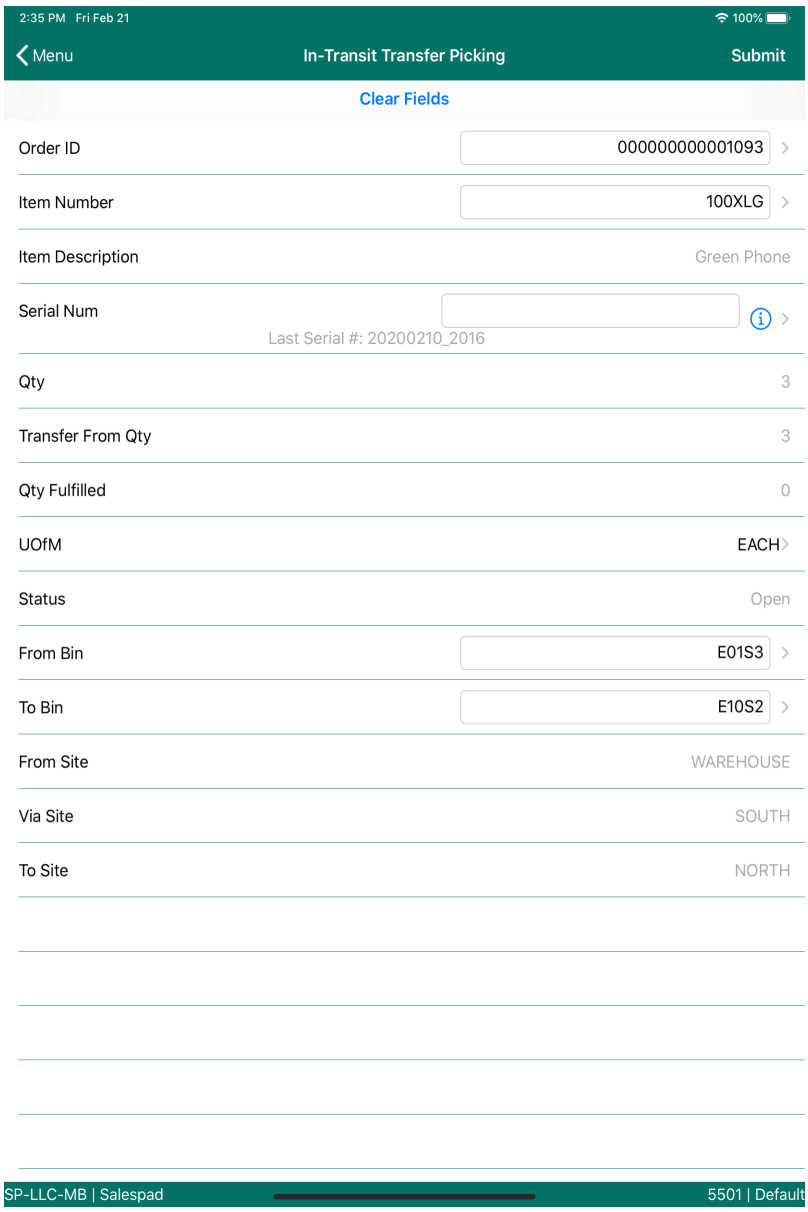
- **Order ID** – Displays the document number for the currently selected ITT document. It will present a lookup of ITT documents when tapped; only 'Open', 'Partially Picked', 'Partially Shipped', and 'Partially Received' documents will be visible. Document numbers can also be entered manually in the available text field, which will load the matching document if found.
- **Item Number** – This field is for specifying which item on the transfer order you'd like to fulfill. All line items on the order can be viewed by tapping on the row on the screen (*outside of the text box*) once an Order ID has been selected.
- **Item Description** – This read-only field will update when the item number is updated and will give a brief description of the item.
- **Non Tracked** – This field displays the tracking type for the currently selected item. If the item is non-tracked, it will display "Non-Tracked". If the item is serial or lot tracked, it will display the serial number, or lot number respectively, and allow input of serials/lots for fulfillment. When tapped, it will present a lookup of all serial numbers/lot numbers in the currently selected 'From Site' and, if applicable, 'From Bin'.
- **Qty** – This field adjusts the quantity that will be picked of the item.
- **Transfer From Qty** – This read-only field displays the total quantity necessary to be transferred for the currently selected item.
- **Qty Fulfilled** – This read-only field displays the quantity fulfilled, to date, for the currently selected item.
- **UofM** – This field displays the UofM that will be fulfilled for the currently selected item upon submission. It will present a lookup of all possible UofMs for the item when tapped.

- **From Bin** – This field is only visible if multi-bin is enabled for the current company. It displays the bin from which the input quantity of the currently selected item will be fulfilled upon submission. It will present a lookup of all bins at the 'From Site' when tapped. Selecting a bin prior to selecting serial/lot numbers will narrow the available options in the serial/lot lookup.
- **To Bin** – This selection field allows the user to specify what bin you'll be fulfilling at the "Via" site.
- **From Site** – This read-only field specifies what site the order is originating from. This determines the items, bins and serial/lots to choose from for fulfillment.
- **Via Site** – This read-only field specifies which site the order's items will be allocated to during the transfer and determines the To Binselections.
- **To Site** – This read-only field specifies which site the order's items will be transferred to once receiving is complete.

The 'In-Transit Picking' screen allows for the fulfillment of items on in-transit transfer documents from the "From" site to the "Via" site. Shipping these fulfillments in Dynamics GP will move the inventory from the "From" site to the "Via" site within the system. In-transit transfer documents must be created in SalesPad Desktop or Dynamics GP to be fulfilled in DataCollection iOS or Android. The creation of in-transit transfer documents in DataCollection is not supported.

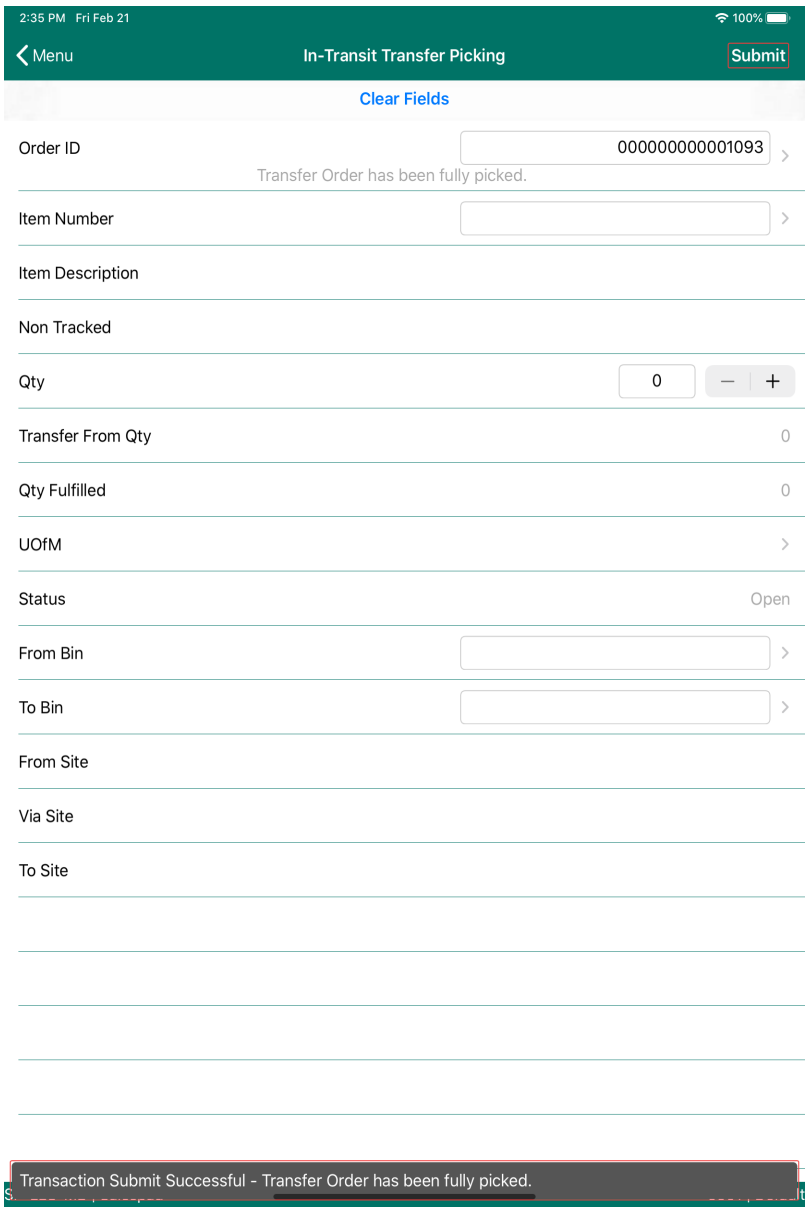
Existing in-transit transfer documents can be loaded by searching via the 'Order ID' field. This will automatically filter to documents that are not in use on any other platform, and have one of the following statuses: 'Open', 'Picked', 'Partially Shipped', or 'Partially Received'. Once the order is selected, the process of fulfillment is very similar to the standard picking process within DataCollection:

1. Select an item to fulfill
2. Select any serial or lot numbers (*if the item is lot or serial tracked*)
3. Designate the 'From' and 'To' bins (*if using a multi-bin environment*)

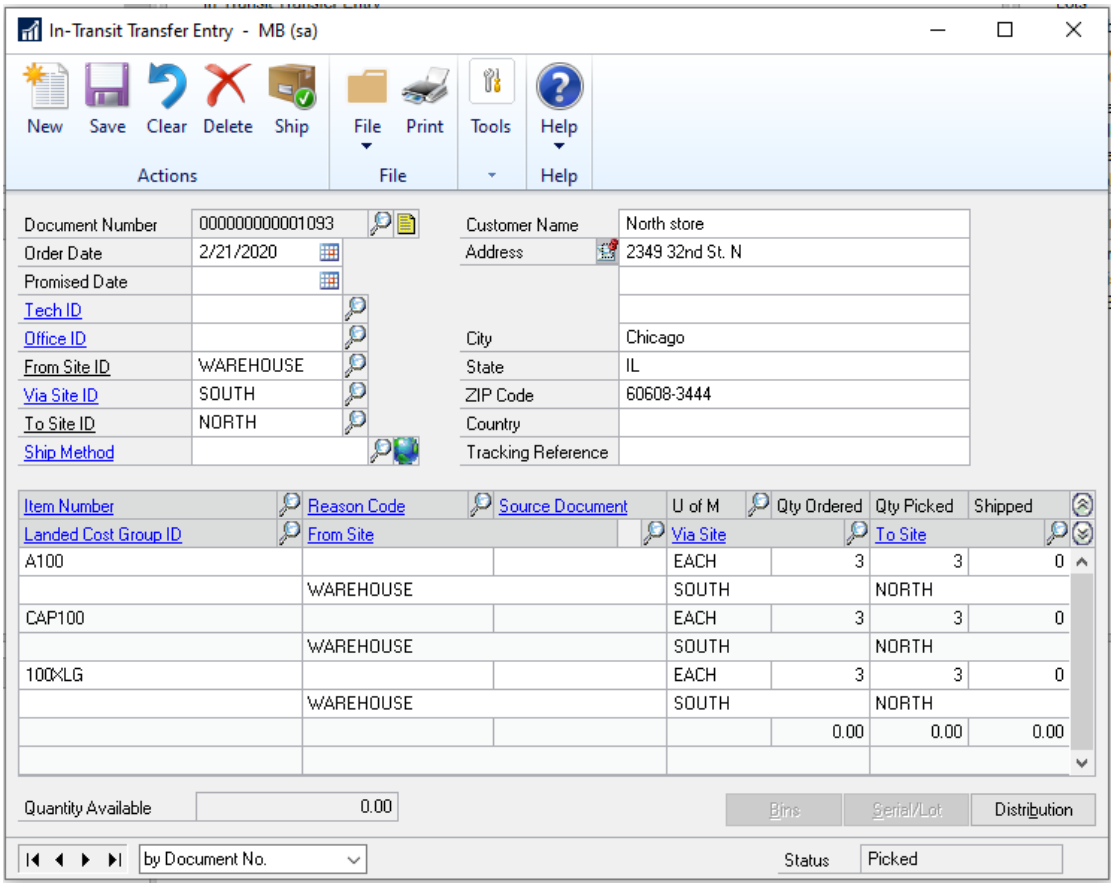


Note: In-Transit Transfer documents will only be available for fulfillment if they are Open, Picked, Partially Shipped, or Partially Received. Documents with a status of Shipped or Received no longer have the possibility of fulfillment

Once all required information has been entered, the transaction can be submitted. A notification will pop up to indicate whether the submission was successful. If the submission failed, relevant errors will be displayed to help the user correct the issue. When all items on the document have been picked, the submission success notification will include that all lines have been fulfilled, and the 'Order ID' cell will update to include that information as well.



Once all lines have been fulfilled, the order can be shipped in Dynamics GP. This moves the inventory from the "From Bin" at the "From Site" to the "To Bin" at the "Via Site". This makes it available to be received at the "To Site" via the 'In-Transit Receiving' screen on DataCollection iOS and Android.



Note: When marking a transfer as "Shipped" in GP, if the transfer line does not have a designated "Via" site, GP will automatically receive that transfer line to the "To" site instead

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In-Transit Receiving

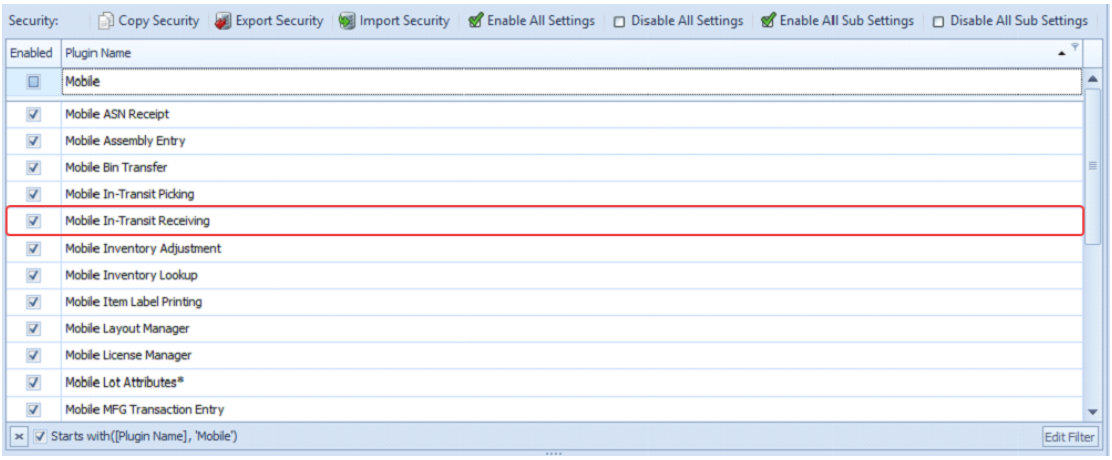
Overview

Now we will cover the usage of the 'In-Transit Receiving' screen. Users can receive serial, lot, or non-tracked items, from a "Via" site to a specified “To” site, when receiving inventory from an in-transit transfer between sites.

Setup

Before using the 'In-Transit Receiving' screen within DataCollection, verify that the “Mobile In-Transit Receiving” security is enabled in the Security Editor on DataCollection Console for each security group that should have access to the screen. You can quickly access this security from the list by searching “Mobile”. Once you have verified that it is enabled, save any changes you may have made.

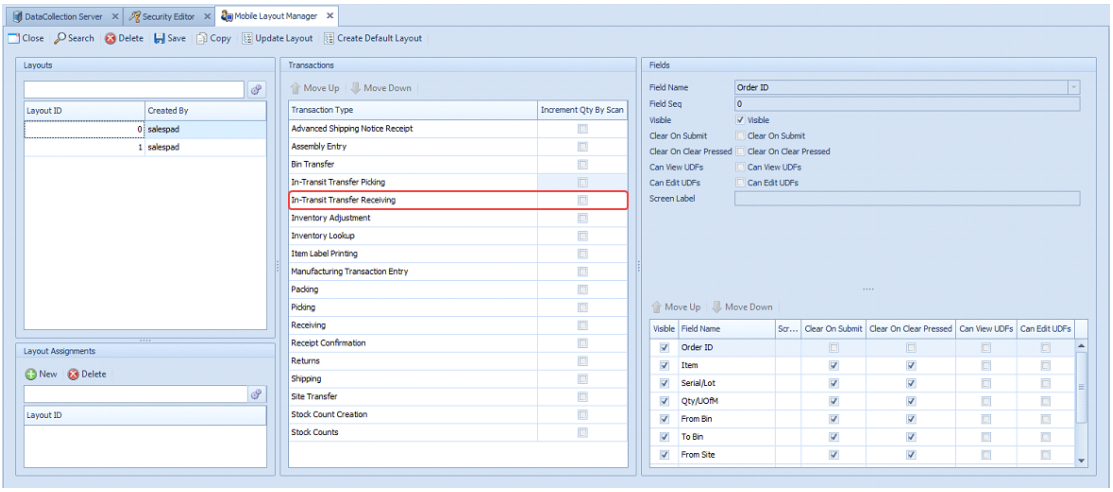
Note: There are no sub-securities for this module



Secondly, you'll need to make sure the current mobile layout manager is updated to include the 'In-Transit Receiving' screen in the main menu on the device.

Select the 'Setup' tab in the DataCollection Console, then click 'Mobile Layout Manager'. Once you see the layout manager, click the 'Search' button to refresh the layouts section. Note that the Layout ID of "0" is reserved for the read-only default template, select this first, click the "Update Layout" button, then click "Search" again to reload the list.

For every following layout, select the layout and click the 'Update Layout' button to refresh the possible transaction types for that specific layout ID. Review the layout's 'Transactions' list, verifying that 'In-Transit Transfer Receiving' has appeared, then rearrange the list as desired to determine where it will appear on the device. Select the 'In-Transit Transfer Receiving' transaction to update its properties, and review the 'Fields' list to rearrange the visible field order and update their properties. Make sure to update every layout, and save before exiting.

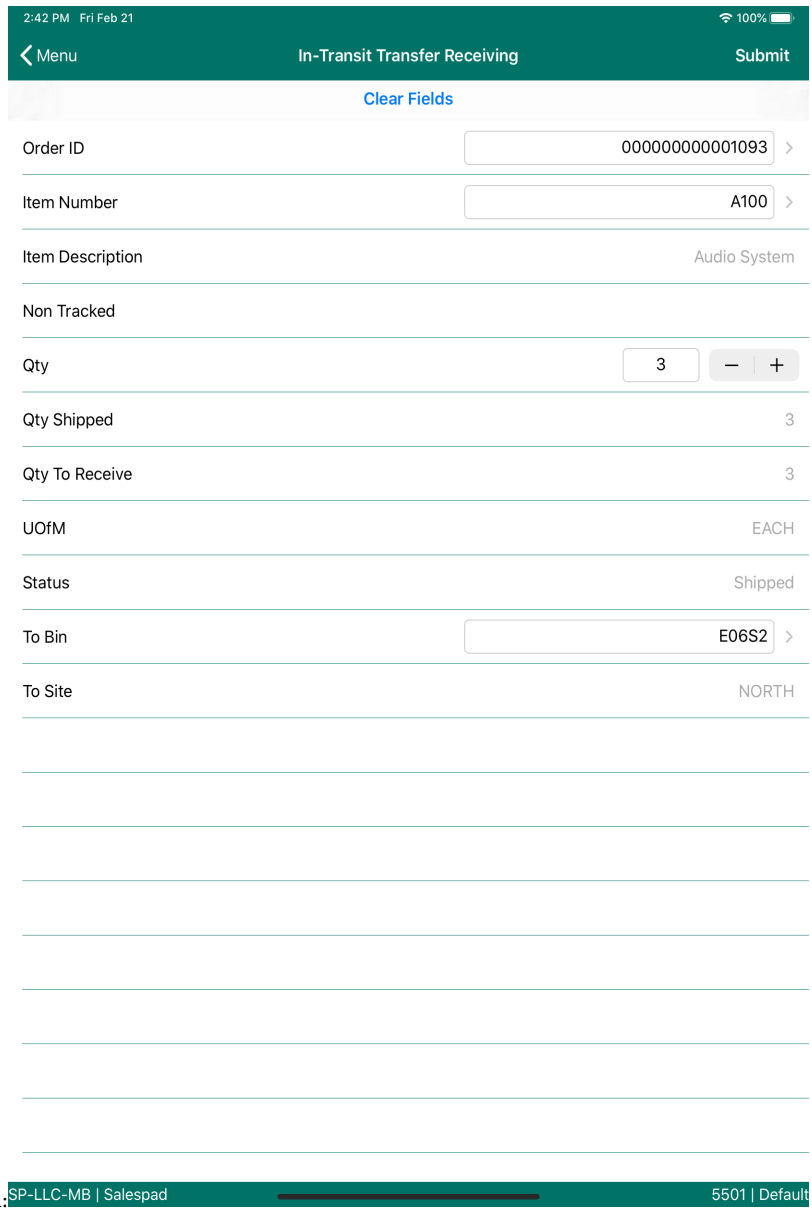


If 'In-Transit Transfer Receiving' does not appear in the 'Transactions' list after clicking the "Update Layout" button, verify that your current build supports this new functionality. If you are using a compatible build, but you still do not see this option, please contact SalesPad Support for assistance.

Usage

Once the above steps in the Setup section have been accomplished, the 'In-Transit Receiving' screen will be available to use within DataCollection.

Below is a screenshot of the In-Transit Receiving screen with a default layout, followed by a description of each



of the fields shown:

Here are some quick descriptions of each of the fields displayed on this screen:

- **Order ID** – Displays the document number for the currently selected ITT document. It will present a lookup of ITT documents when tapped; only 'Open', 'Partially Picked', 'Partially Shipped', and 'Partially Received' documents will be visible. Document numbers can also be entered manually in the available text field, which will load the matching document if found.
- **Item Number** – This field is for specifying which item on the transfer order you'd like to fulfill. All line items on the order can be viewed by tapping on the row on the screen (*outside of the text box*) once an Order ID has been selected.
- **Item Description** – This read-only field will update when the item number is updated and will give a brief description of the item.
- **Non Tracked** – This field displays the tracking type for the currently selected item. If the item is non-tracked, it will display "Non-Tracked". If the item is serial or lot tracked, it will display the serial number, or lot number respectively, and allow input of serials/lots for fulfillment. When tapped, it will present a lookup of all serial numbers/lot numbers in the currently selected 'From Site' and, if applicable, 'From Bin'.
- **Qty** – This field displays the quantity that will be received for the currently selected item upon submission.
- **Qty Shipped** – This read-only field displays the total quantity that was shipped for the currently selected line.
- **Qty To Receive** – This read-only field displays the total remaining quantity left to receive from the selected line.
- **UofM** – This field displays the UofM that will be fulfilled for the currently selected item upon submission

(*it will present a lookup of all possible UofMs for the item when tapped*).

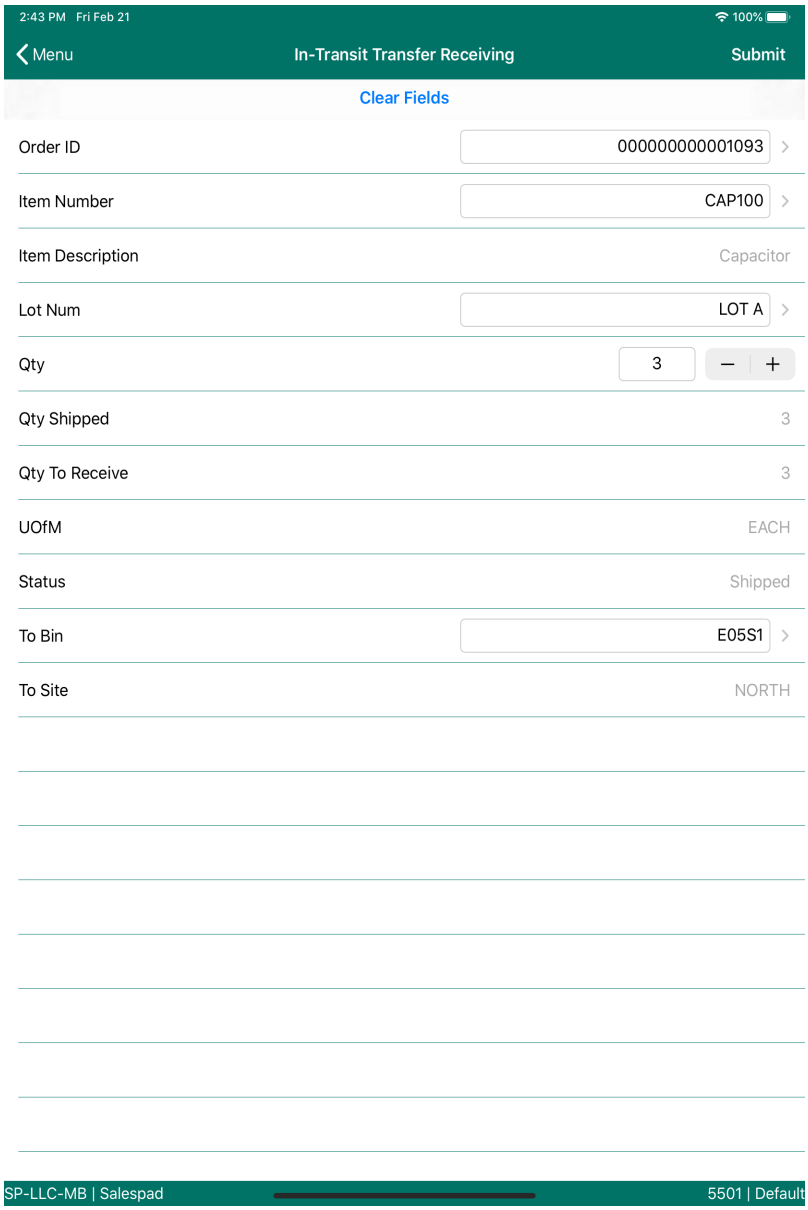
- **To Bin** – This selection field allows the user to specify what bin you'll be receiving to, based on the selected "To Site".
- **To Site** – This read-only field specifies which site the order's items will be transferred to once receiving is complete.

The 'In-Transit Receiving' screen allows receiving items on in-transit transfer documents from the "Via" site to the "To" site, effectively restoring the inventory back into stock. Posting these receipts in Dynamics GP will move the inventory from the "Via" site to the "To" site within the system. ITT documents must be created in SalesPad Desktop or Dynamics GP to be fulfilled and received in DataCollection iOS or Android.

Note: In-Transit Transfers must be created in SalesPad Desktop or Microsoft Dynamics GP. ITT fulfillments must be shipped and ITT receipts must be posted in Microsoft Dynamics GP

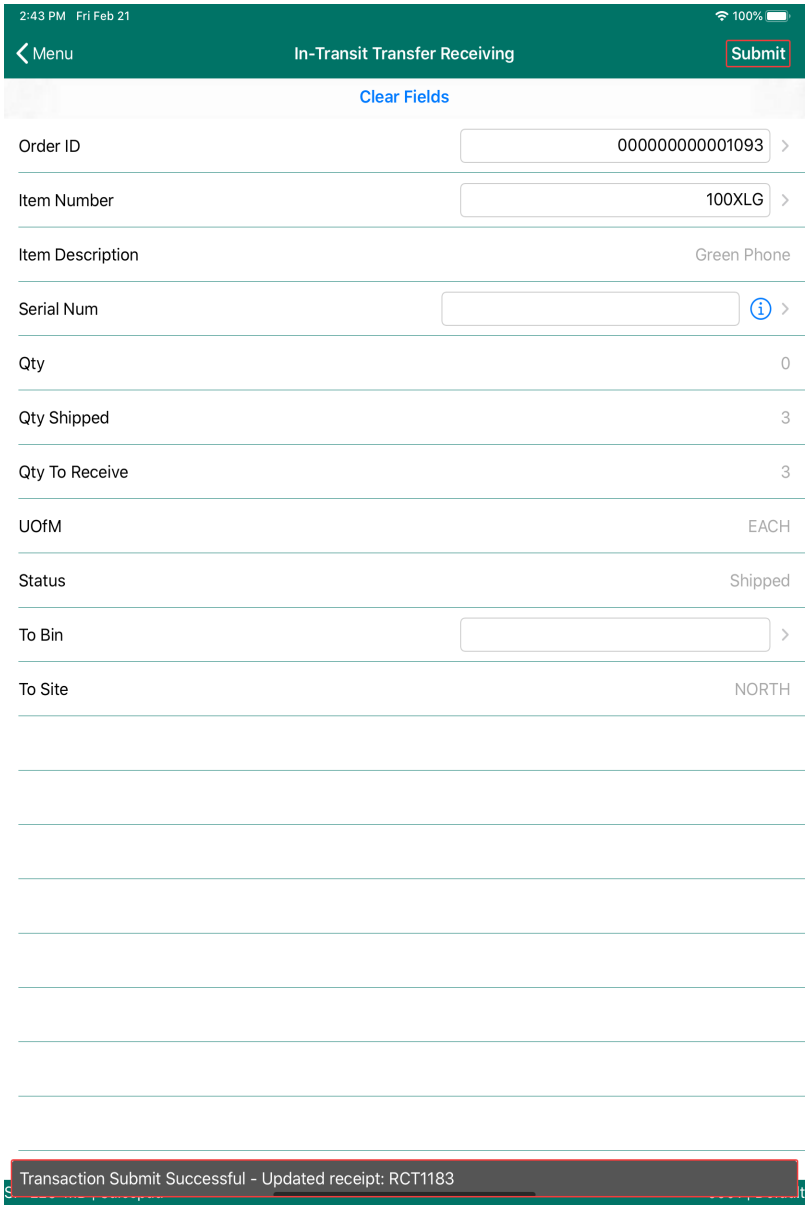
Existing ITT documents can be loaded by searching via the 'Order ID' field. This will automatically filter to documents that are not in use on any other platform, and have one of the following statuses: 'Open', 'Picked', 'Partially Shipped', or 'Partially Received'. Once the order is selected, the process of receiving is very similar to the standard PO Receiving screen on DC:

1. Select your order to receive
2. Choose an item
3. Pick the serial/lot number(*s*)
4. Designate a "To" bin (*if in a multi-bin environment*)



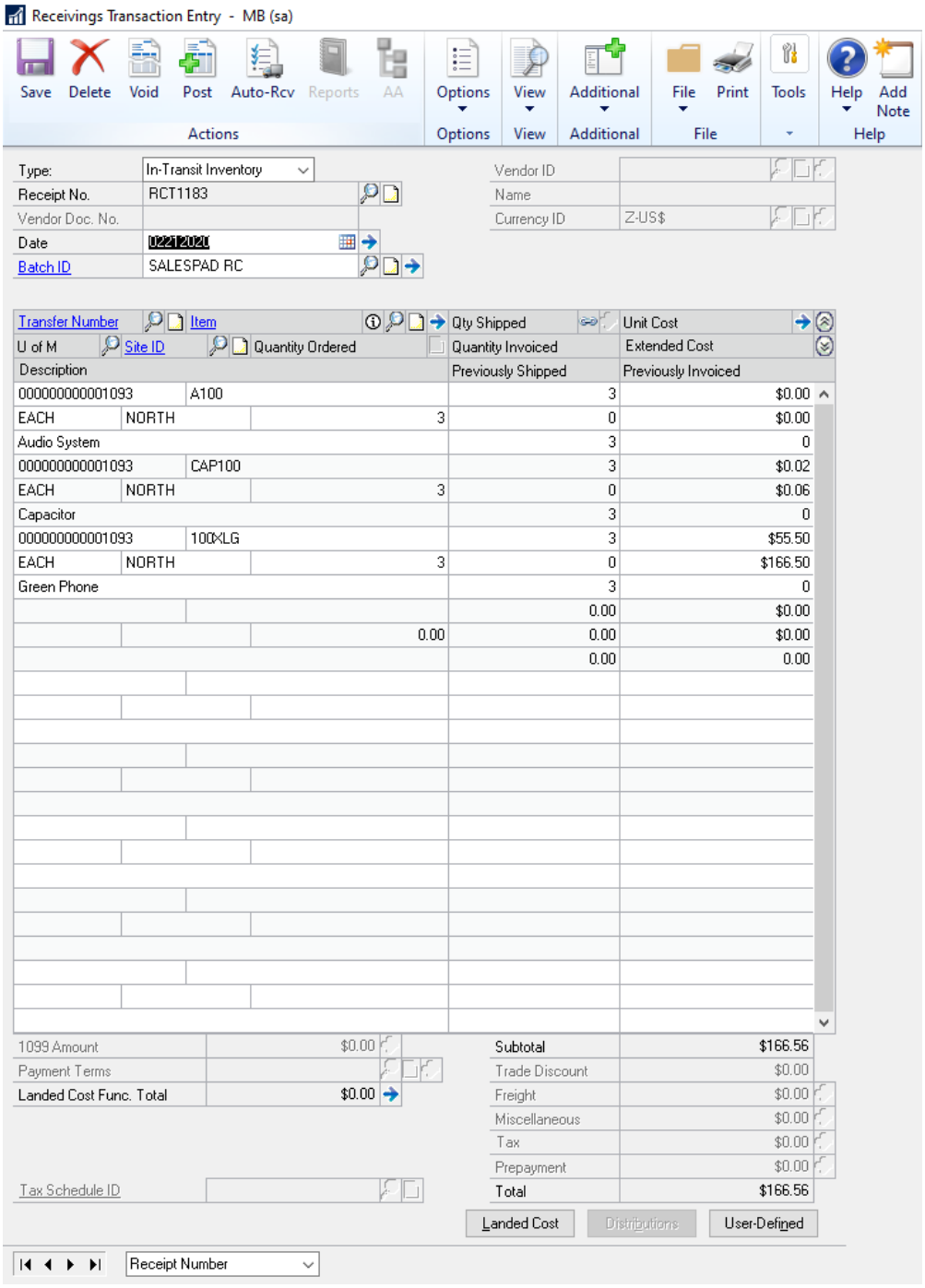
Once all required information has been entered, the transaction can be submitted. A notification will pop up to indicate whether the submission was successful, and it will include the receipt number of the created (*or*

updated) receipt if successful. If the submission failed, relevant errors will be displayed to help the user correct the issue. When all items on the document have been submitted as received, the submission success notification will include that all lines have been received, and the 'Order ID' cell will update to include that information as well.



After all of the lines have been received, all relevant receipts can be posted in Dynamics GP. This moves the inventory from the "Via" site to the "To" site. This makes it available for all further inventory movements and fulfillments at the "To" site.

Once all lines have been successfully received on the handheld, the order can be posted through Microsoft Dynamics GP.



Note: DataCollection does not currently support posting, this process must be completed in Microsoft Dynamics GP