



# Submitting Transfers in Helical

Date: 25 June 2025

Version: 1

1. Introduction to the Helical transfer module
2. Navigating to the transfer module on the Helical database and finding the Helical specific transfer forms
3. Transferring animals to 1 purchaser on the same date
4. Transferring animals with multiple transfer dates and/or multiple purchasers

## 1. Introduction

Helical is the new AWA database that will replace the current ILR2, I4 and Portal platforms. As we progress through the migration, we will be opening new modules for members to be able to submit data through to the MSO team.

Over the coming months we will continue to work on all modules to enable them to be as user friendly and easy to use as possible. Please note that as we update modules, we will also work to update any related factsheets to reflect these changes as soon as we can.

Within the transfer module in Helical, members will be able to submit their animal transfers directly into the database for the MSO team to approve and invoicing will be completed directly from Helical and Xero.

Members have the option to submit transfers of one or more animals to a single purchaser on the same date, or to transfer to multiple purchasers with multiple transfer dates all within the same transfer request.

For any transfers to or from a Syndicate, or to a non-member, please also send these through to the AWA MSO team. We expect this functionality to be available directly to members shortly.

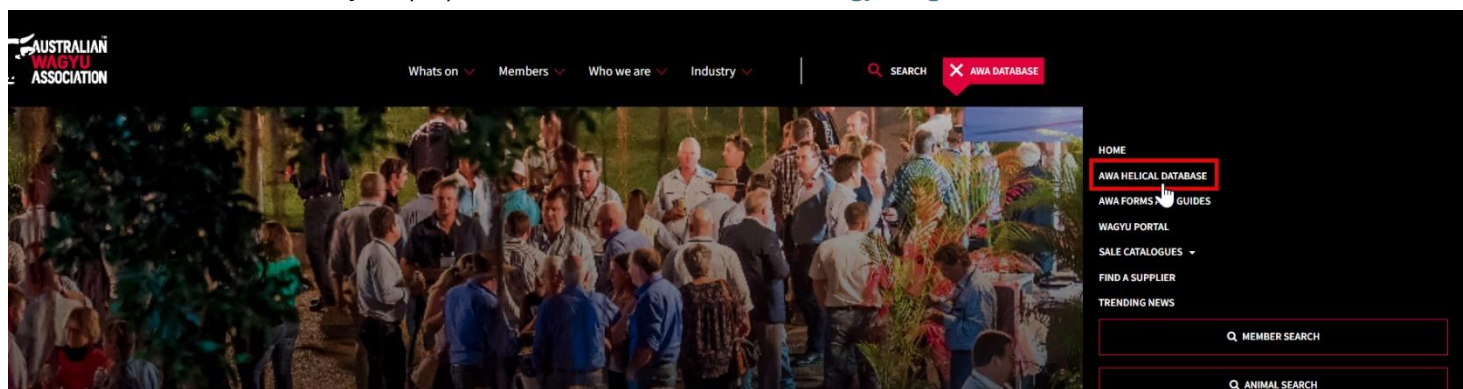
Details instructions on how to complete both transfer methods can be found in this factsheet.

If you have joining data for animals being sold as PTIC, at this stage, this will need to be submitted via a Matings template. We foresee that this will be able to be submitted alongside other data in the future.

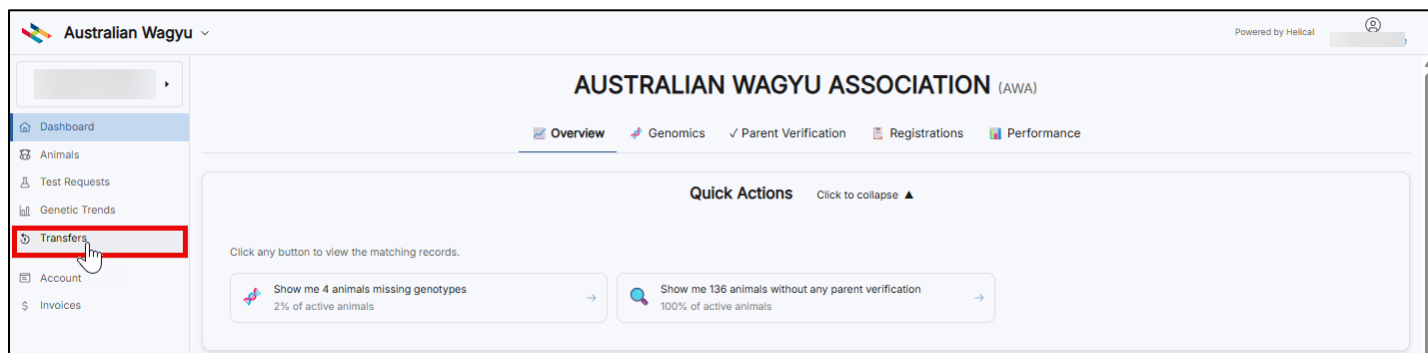


## 2. Navigating to the transfer module on the Helical database.

1. Navigate to the Helical database. A quick link can be found on the AWA website ([www.wagyu.org.au](http://www.wagyu.org.au)) under the "AWA database" drop down menu.
2. If you are not already logged into Helical, you will need to log in. If you are unsure on how to login, or are not set-up as a user, please refer to the "Login Information" and "User and Policies information" for details instructions. If you are still having difficulty, please contact the AWA MSO team directly on (02) 8880 7700, or email [office@wagyu.org.au](mailto:office@wagyu.org.au).



3. Select the "Transfer" tab on the side bar within Helical.





4. Select the “New Transfer” button.

The screenshot shows the Australian Wagyu Admin Portal interface. On the left is a sidebar with navigation links: Dashboard, Animals, Test Requests, Genetic Trends, Transfers (highlighted), Account, and Invoices. The main content area has a search bar and a table header with columns 'Status' and 'Name'. Below the header, it says 'No matches' and 'Try different filters?'. In the top right corner, a 'New Transfer' button is highlighted with a red box. The bottom right corner shows 'Items per page: 10' and pagination controls.

5. Below is the page that will come up. From here you have the option to transfer animals to a single purchaser on a single date, or transfer animals to multiple purchasers on different dates, or a combination of purchasers and/or dates.

NOTE: At any point in this process, you can select the “Save and Exit” button to Save your transfers and come back to finish them later.

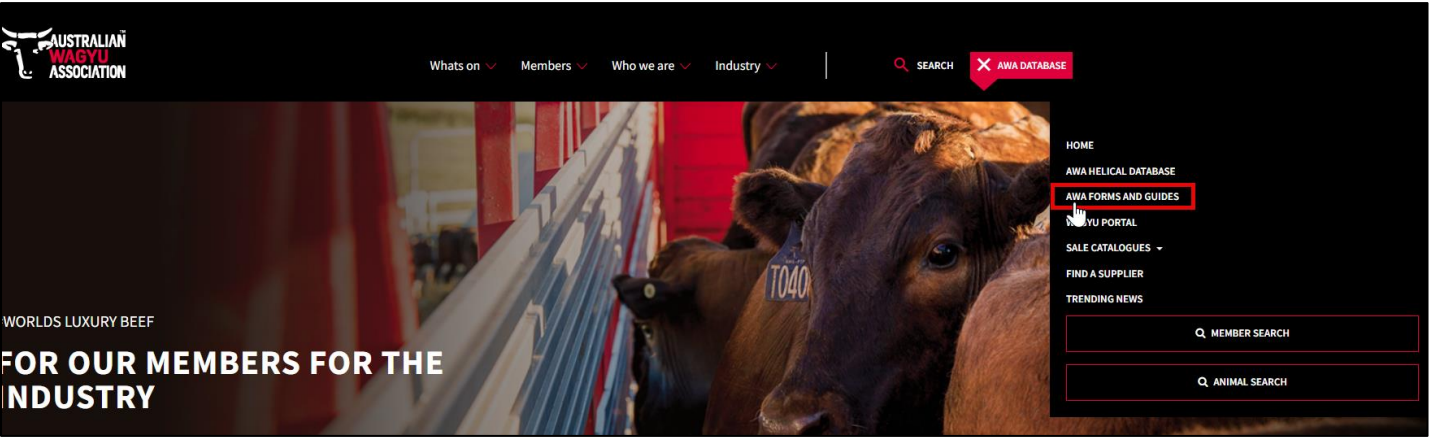
If you exit this screen without selecting this button, the data you have input will not be saved.

The screenshot shows the 'Choose Animals' page in the Australian Wagyu Admin Portal. The page has a sidebar with the same navigation links as the previous screenshot. The main content area is titled 'Choose Animals' and includes an 'Advanced Options' section. This section contains several form fields: 'Transfer From\*' (set to 'AWA'), 'Transfer To\*' (set to 'None'), 'Transfer Name\*' (set to 'Transfer 2025-06-23'), 'Date\*' (set to '23/06/2025'), and 'Currency\*' (set to 'AUD'). Below these fields is a table with a header 'AWA Ident\*' and a row with the text 'Enter AWA Ident...'. At the bottom left, there are two buttons: 'Next' and 'Save and Exit', with the 'Save and Exit' button highlighted by a red box. The bottom right corner shows '0 rows' and some table controls.

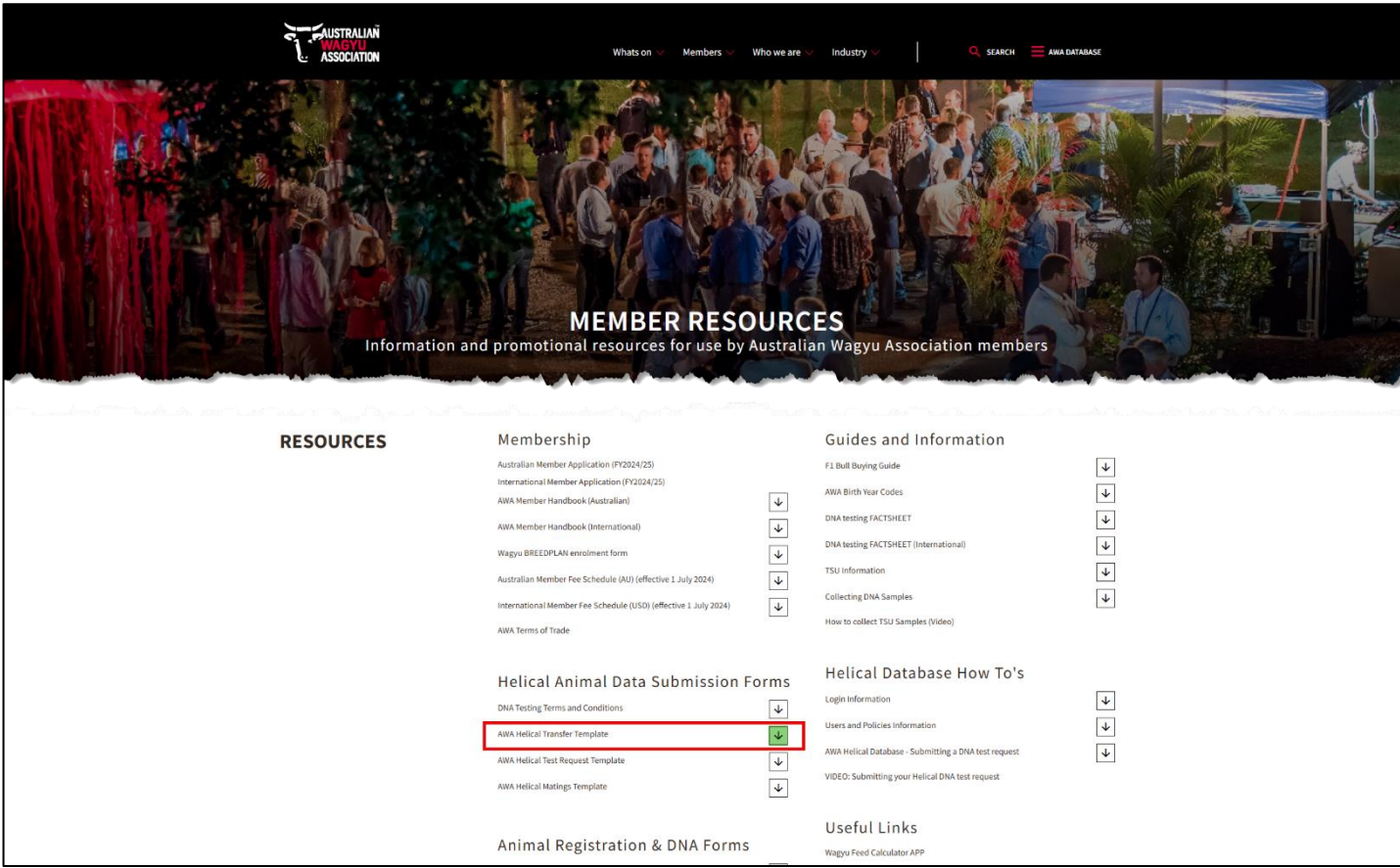


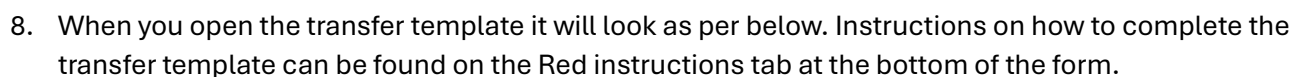


6. Helical specific transfer forms can also be found on the AWA website at the following link (Insert link), or by navigating to the AWA Database button and then selecting “AWA Forms and Guides”.



7. To download the Helical transfer template, click on the arrow as highlighted green in the below screenshot.



AUSTRALIAN WAGYU ASSOCIATION | PAGE 5



### 3. Transferring animals to 1 purchaser on the same date

1. Search for the purchasing members ID and select as the “Transfer To” field.  
At this stage this will only search for AWA members, however the functionality to create non-members will be released in the coming weeks.

The screenshot shows the 'Choose Animals' form in the Australian Wagyu system. The 'Transfer From\*' field is set to 'AWA'. The 'Transfer To\*' dropdown is open, showing a search for 'ctr' and a selection of 'CTR CAROLINE TRIEBE'. The 'Transfer Name\*' field is set to 'Transfer 2025-06-23'. The 'Date\*' field is set to '23/06/2025'. The 'Currency\*' field is set to 'AUD'. The 'Filter...' field is empty. The 'Load Data', 'Clear Table', and 'View' buttons are visible. The 'Next' and 'Save and Exit' buttons are at the bottom.

2. Add in a Name in the “Transfer name” field.  
Note: this will automatically populate with the import type and the date (IE: Transfer 2025-06-23), however we would encourage you to add in a name that identifies this import for you so that it is easier for the MSO team to find if you need assistance, or if you need to review at a later date.

The screenshot shows the 'Choose Animals' form in the Australian Wagyu system. The 'Transfer From\*' field is set to 'AWA'. The 'Transfer To\*' dropdown is set to 'CTR'. The 'Transfer Name\*' field is highlighted with a red box and contains the text 'Transfer 2025-06-23 Transfer to C'. The 'Date\*' field is set to '22/06/2025'. The 'Currency\*' field is set to 'AUD'. The 'Filter...' field is empty. The 'Load Data', 'Clear Table', and 'View' buttons are visible. The 'Next' and 'Save and Exit' buttons are at the bottom.





3. Select a transfer date. This can be done by typing in a date into the date field, or by selecting the calendar and selecting the date for your transfer.

**Australian Wagyu** Admin Portal

1 Choose Animals

Advanced Options

Transfer From\* AWA → Transfer To\* CTR

Transfer Name\* Transfer 2025-06-23

Name of the transfer for reference

Date\* 22/06/2025

June 2025

Mo	Tu	We	Th	Fr	Sa	Su
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

Clear Today

Next Save and Exit

Load Data Clear Table View: 0 rows



4. Add your animals to be transferred. Adding in your animals to be transferred can be done by several ways, please see preferred selection methods outlined below.

- a. Select animals from within your ownership.

Click the “Select Animals” tab option at the top of the pop-up box.

To narrow down your options of animals to select from, you can add in additional filters in the filter bar, or you can search for the animal by its registered ID.

Select the animals by clicking on the tick box next to the ID – you can select multiple animals within this screen, even if you clear or change the information in the filter bar. The number selected will display next to the tick box above the animal IDs.

Once you are happy with the selection, click “Add selection”.

NOTE: You can remove animals after adding them to the transfer table, or choose to add more as required even if you click “Add selection” here.

Status	Owner	AWA ID	IMUF	LFDF	Date	Sex
<input checked="" type="checkbox"/>	AWAFHTEST1	IMUFQTF147	LFDF0367	2012-07-31	bull	
<input checked="" type="checkbox"/>	AWAFHTEST2	WKSFN2892	LFDF0325	2012-07-31	cow	





b. Copy and paste a list

Click the “Copy and Paste” tab option at the top of the pop-up box. This should be the default tab that the pop-up box opens to.

Copy your list of animal IDs from where-ever you have them recorded (IE: Excel), and paste into the box. Click “Next”.

Select the “Destination column” (IE: what information is in that column of data) from the available options – for this particular transfer type, the only option to select from will be “AWA Ident”.

Once you have selected the “Destination Column” you will be able to click “Add Data”. This will populate the list of animals you have pasted in into the transfer information table.



- Once you animals are loaded into the transfer table and you are happy with the provided animals, click “Next”

- A summary of the animals to be transferred along with costs associated will display as per the below.  
If you are happy that this is correct, click “Transfer”.

AWA Ident	From Entity	To Entity	Date	Cost	Description
AWAFHTEST1	AWA	CTR	2025-06-24	AS\$0.00	Transfer breeding Male
AWAFHTEST2	AWA	CTR	2025-06-24	AS\$13.95	Transfer breeding female
Total Cost:				AS\$13.95	



7. Once you click transfer, you will get a “Transfer request submitted” message and the status of the transfer request will change from “draft” to “pending”.

Australian Wagyu

Dashboard

Animals

Test Requests

Genetic Trends

Transfers

Account

Invoices

Transfer 2025-06-24 Transfer to CTR 23Jun25

pending

Submitted At: 2025-06-24

Submitted By: Caroline Triebe (caroline@wagyu.org.au)

AWA Ident	From	To	Date
AWAFHTEST1	AWA	CTR	2025-06-24
AWAFHTEST2	AWA	CTR	2025-06-24

Transfer request submitted

8. If you navigate back to the “Transfer” tab on the sidebar, this transfer request should now show as pending.  
Once this has been processed and invoiced by the MSO team, this will change to “Completed”.

Australian Wagyu

Dashboard

Animals

Test Requests

Genetic Trends

Transfers

Account

Invoices

Filter or search...

New Transfer

Status	Name	Entity	Submitted At
pending	Transfer 2025-06-24 Transfer to CTR 23Jun25	AWA	2025-06-24 16:58

Items per page: 10 1 - 1 of 1





#### 4. Transferring animals with multiple transfer dates and/or multiple purchasers

1. Select Advanced options to show the “Multiple transfer recipients” and “Multiple transfer dates” options.

You can select one or both options dependant on your requirement.  
As these options are selected, additional columns will appear in the transfer information table as outlined below.

Australian Wagyu

Dashboard

Animals

Test Requests

Genetic Trends

Transfers

Account

Invoices

1 Choose Animals

2 Summary

Advanced Options

☒ Multiple Transfer Recipients

If enabled, you can enter the recipient entity for each animal instead of once for the entire transfer

☒ Multiple Transfer Dates

If enabled, you can enter a different transfer date for each animal instead of once for the entire transfer.

Transfer From\*

AWA

Transfer Name\*

Transfer 2025-06-23

Name of the transfer for reference

Currency\*

AUD

Select currency to be charged in for the transfer

Filter...

☐ AWA Ident\*

Enter AWA Ident...

To Entity\*

Enter To Entity...

Date\*

Enter Date...

Load Data

Clear Table

View: [Table Icon] [List Icon]

0 rows

Next

Save and Exit



2. Add in a Name in the “Transfer name” field.

Note: this will automatically populate with the import type and the date (IE: Transfer 2025-06-23), however we would encourage you to add in a name that identifies this import for you so that it is easier for the MSO team to find if you need assistance, or if you need to review at a later date.

**Australian Wagyu** | Powered by Helical

**1 Choose Animals** | Summary

**Advanced Options**

- ☒ Multiple Transfer Recipients  
If enabled, you can enter the recipient entity for each animal instead of once for the entire transfer.
- ☒ Multiple Transfer Dates  
If enabled, you can enter a different transfer date for each animal instead of once for the entire transfer.

Transfer From\*  
AWA

**Transfer Name\***  
Transfer 2025-06-24 Transfer CTR  
Name of the transfer for reference

Currency\*  
AUD  
Select currency to be charged in for the transfer

Filter...

AWA Ident*	To Entity*	Date*
Enter AWA Ident...	Enter To Entity...	Enter Date...

Load Data | Clear Table | View: 0 rows

Next | Save and Exit

3. Add your animals to be transferred. Adding in your animals to be transferred can be done by several ways, please see preferred selection methods outlined below.

**Australian Wagyu** | Powered by Helical

**1 Choose Animals** | Summary

**Advanced Options**

- ☒ Multiple Transfer Recipients  
If enabled, you can enter the recipient entity for each animal instead of once for the entire transfer.
- ☒ Multiple Transfer Dates  
If enabled, you can enter a different transfer date for each animal instead of once for the entire transfer.

Transfer From\*  
AWA

**Transfer Name\***  
Transfer 2025-06-23  
Name of the transfer for reference

Currency\*  
AUD  
Select currency to be charged in for the transfer

Filter...

AWA Ident*	To Entity*	Date*
Enter AWA Ident...	Enter To Entity...	Enter Date...

Load Data | Clear Table | View: 0 rows







b. Copy and paste a list

Click the “Copy and Paste” tab option at the top of the pop-up box. This should be the default tab that the pop-up box opens to.

Copy your list of animal IDs from where-ever you have them recorded (This is where the Excel Helical transfer template comes in handy), and paste into the box.

The screenshot shows the Australian Wagyu Helical transfer interface. A pop-up box is open with the 'Copy and Paste' tab selected. Red circles and boxes highlight the 'Copy and Paste' tab, the data entry fields, and the 'Next' button.

If you are using the AWA Helical transfer template, you can simply select the data that you have added in, including the Header row, and paste into the above copy and past box. When you get to the next step of assigning data to columns, this should automatically be assigned based on the headers provided in the transfer template.



Select the “Destination column” (IE: what information is in that column of data) from the available options – for this particular transfer type you will need to assign a column as “AWA Ident”, one as “To Entity” and one as “Date”.

As mentioned above, if you are using the AWA Helical transfer template and include the header row, these columns will automatically be assigned.

Once you have selected the “Destination Column” you will be able to click “Add Data”. This will populate the list of animals you have pasted in into the transfer information table.

**Select Columns**

Map the columns from the data to the table.  
If the data has a header line, ensure 'File has header' is checked.

Source Column	Destination Column
AWAFHTEST1	→ AWA Ident
CTR	→ To Entity
22/06/2025	→ Date

**4**

**5** Add Data



4. Once your data is loaded, you can format dates as required. The date format for Helical should be YYYY-MM-DD.

**Australian Wagyu** | Powered by Helical

**1 Choose Animals** | Summary

**Advanced Options**

- ☒ Multiple Transfer Recipients  
If enabled, you can enter the recipient entity for each animal instead of once for the entire transfer.
- ☒ Multiple Transfer Dates  
If enabled, you can enter a different transfer date for each animal instead of once for the entire transfer.

Transfer From\*  
AWA

Transfer Name\*  
Transfer 2025-06-23 Transfer to C  
Name of the transfer for reference

Currency\*  
AUD  
Select currency to be changed in for the transfer

Filter...

AWA Ident*	To Entity*	Date*
<input type="checkbox"/> AWAFTTEST1	CTR	22/06/2025
<input type="checkbox"/> AWAFTTEST2	MBM	2025-06-25
Enter AWA Ident...	Enter To Entity...	Enter Date...

**Data format detected.**  
Date appears to be using DD/MM/YYYY format.  
Click the button below to confirm and convert these dates to YYYY-MM-DD format.  
[Convert DD/MM/YYYY to YYYY-MM-DD](#)

[Next](#) [Save and Exit](#)

5. When you are happy with the entered data, select “Next”

**Australian Wagyu** | Powered by Helical

**1 Choose Animals** | Summary

**Advanced Options**

- ☒ Multiple Transfer Recipients  
If enabled, you can enter the recipient entity for each animal instead of once for the entire transfer.
- ☒ Multiple Transfer Dates  
If enabled, you can enter a different transfer date for each animal instead of once for the entire transfer.

Transfer From\*  
AWA

Transfer Name\*  
Transfer 2025-06-23 Transfer to C  
Name of the transfer for reference

Currency\*  
AUD  
Select currency to be changed in for the transfer

Filter...

AWA Ident*	To Entity*	Date*
<input type="checkbox"/> AWAFTTEST1	CTR	2025-06-22
<input type="checkbox"/> AWAFTTEST2	MBM	2025-06-25
Enter AWA Ident...	Enter To Entity...	Enter Date...

[Next](#) [Save and Exit](#)





6. A summary of the animals to be transferred along with costs associated will display as per the below.  
If you are happy that this is correct, click “Transfer”.

Australian Wagyu

Dashboard

Animals

Test Requests

Genetic Trends

Transfers

Account

Invoices

Transfer 2025-06-23 Transfer\_CTR\_MBM\_23Jun25

draft

Choose Animals

Summary

AWA Ident	From Entity	To Entity	Date	Cost	
AWAFHTEST1	AWA	CTR	2025-06-22	A\$0.00	Transfer breeding Male
AWAFHTEST2	AWA	MBM	2025-06-22	A\$13.95	Transfer breeding female
Total Cost:				A\$13.95	

Transfer

Save and Exit

7. Once you click transfer, you will get a “Transfer request submitted” message and the status will change from “draft” to “pending”

Australian Wagyu

Dashboard

Animals

Test Requests

Genetic Trends

Transfers

Account

Invoices

Transfer 2025-06-23 Transfer\_CTR\_MBM\_23Jun25

pending

Submitted By Caroline Triebe (caroline@wagyu.org.au)


Submitted At 2025-06-23

AWA Ident	From	To	Date
AWAFHTEST1	AWA	CTR	2025-06-22
AWAFHTEST2	AWA	MBM	2025-06-22

Transfer request submitted



8. If you navigate back to the “Transfer” tab on the side-bar, this transfer request should now show as pending. Once this has been processed and invoiced by the MSO team, this will change to “Completed”.

 Australian Wagyu

Dashboard

Animals

Test Requests

Genetic Trends

Transfers

Account

Invoices

Filter or search...

Status

Name

Entity

Submitted At

pending

Transfer 2025-06-23 Transfer\_CTR\_MBM\_23Jun25

2025-06-23 10:36

Items per page: 10

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