



# Sales Branch Work instructions

Date:  
Status:      Version x.x

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# 1. Sales

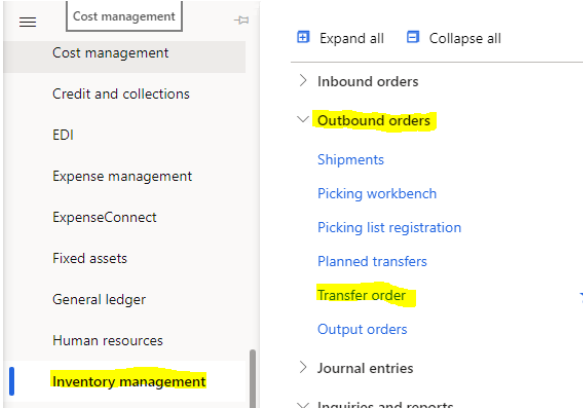
## 1.1. Transfer Order

### 1.1.1. Create transfer order

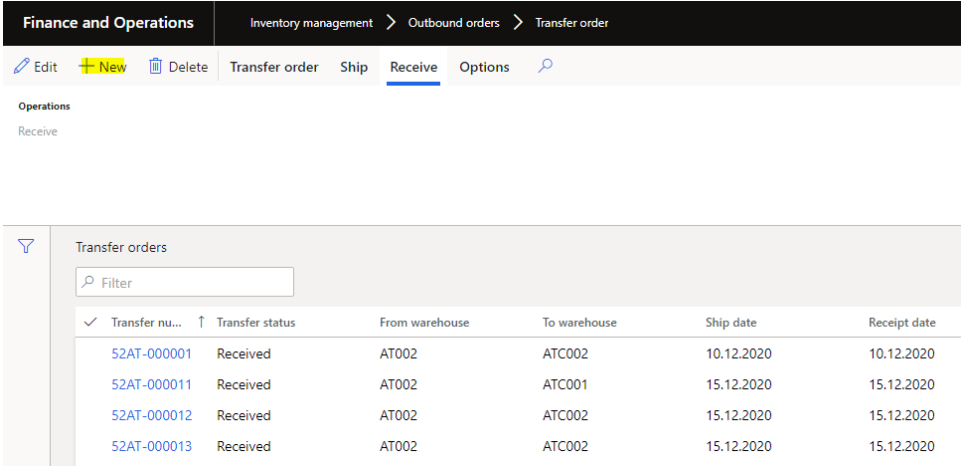
To get stock to the transfer warehouse, those goods must be transferred from the main warehouse to the transfer warehouse.

To transfer goods from one warehouse to another, navigate to

Inventory management -> outbound orders -> transfer orders

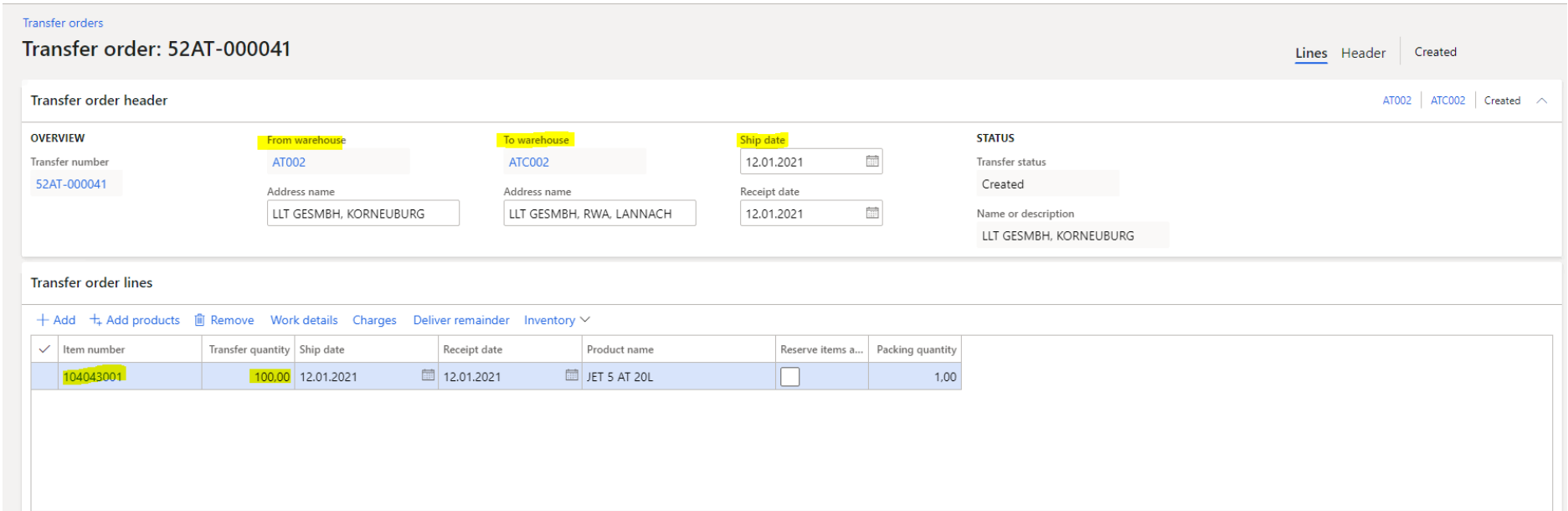


Select "+New" to create new transfer order



Fill the mandatory fields:

From warehouse	Warehouse from which the goods will be send
To Warehouse	Receiving warehouse / customers consignment warehouse
Ship date	date on which goods will transferred
Item Number	item to be transferred
Transfer quantity	



Generate Picking List to trigger delivery documents. Choose "Available Quantity" as update. You can set Available Quantity as default value by clicking on "Default values" and selecting it via drop down.

## Work Instructions

?

Posting picking list

PARAMETERS

Late selection  
☒ No

Overview General

Select Default values

✓	Transfer number	Update	Print picking list
✓	52AT-000041	Available quantity	<input type="checkbox"/>

Lines

Inventory

✓	Item number	Pick quantity	CW pick quantity
	104043001	100,00	

OK Batch Cancel

Click ok to post the picking list and release it to the warehouse.

After you've received the delivery documents back from your warehouse proceed with the picking list registration.  
Ship – Operations – Picking list registration

Add the batch number on line level and click "Updates – Update all" on top ribbon to finalize the registration.

Finance and Operations Inventory management Outbound orders Transfer order

Save + New Delete Updates Functions Print Options

Update all

Picking list registration | 52AT-000041 : 12.01.2021

PLAT20000111

Identification

Picking route	Handling status	Shipment	Reference
PLAT20000111	Activated	52AT-000111	Transfer order shipment

Picking route details

Handling

Statistics

Delivery

Lines

Functions Output orders Inventory Register serial numbers

Select	Handling status	Item number	Pick quantity	Warehouse	Location	Batch number
<input type="checkbox"/>	Activated	104043001	100,00	AT002	DEFAULT	Test123

The handling status of the line changes from Activated to completed.

Close the picking list registration screen.

Click Save on top ribbon, then select "Ship Transfer order" (Ship – Operations – Ship transfer order)

Select "available quantity" and check the shipped quantity on line level, then click "OK" to ship the transfer order.

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Work Instructions

Shipment

Late selection  
☒ No

OverviewGeneral

SelectDefault values

✓	Transfer number	Update	Posting date	Tracking ID	Explode lines	Autoreceive	Print transfer s...	Print product la...	Print shelf labels
✓	52AT-000041	Available quantity	11.01.2021		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

LinesGeneralDimensions

Inventory

✓	Item number	Product name	CW ship now	Ship quantity	Close
✓	104043001	JET 5 AT 20L		100.00	<input type="checkbox"/>

OK

The status of the transfer order is now “Shipped”

Operation completed

Transfer orders

Transfer order: 52AT-000041

LinesHeaderShipped

Transfer order header

AT002ATC002Shipped

Receive Transfer Order

To receive the transfer order select Receive – Operations – receive  
Choose Update “All” and click OK.  
The Transfer order is now booked into the new warehouse.