



Sales Branch Work instructions

Date:
Status: Version x.x

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1. Sales

1.1. Consignment Order

1.1.1. Create consignment order

Navigate to your sales order screen
Modules -> accounts receivables -> all sales orders

Create new sales order

IMPORTANT: Select the customers consignment warehouse as warehouse in the consignment sales order.

Create sales order

Customer ▼

General SOAT20000082 ^

SALES ORDER
Sales order SOAT20000082

Invoice account CUAT000008 ▼

Order type Sales order ▼

Name RWA Raiffeisen Ware Austria AG

REFERENCES
Customer requisition
Customer reference Consignment Test
Sales agreement ID
Project ID

CURRENCY
Currency EUR ▼

STORAGE DIMENSIONS
Site 01 ▼
Warehouse ATC002 ▼

INTERCOMPANY
Intercompany No ▼

TAX
Tax exempt number ATU43010905 ▼

Add items and volumes to be send to customers consignment stock

SOAT20000082 : RWA Raiffeisen Ware Austria AG Lines Header Open order

Sales order header

DELIVERY ADDRESS
Name RWA Raiffeisen Ware Austria AG
Address Raiffeisenstraße 1
2100 Korneuburg
Austria

DELIVERY DATE
Requested ship date 11.01.2021 ▼
Requested receipt date 11.01.2021 ▼
[Simulate delivery dates](#)

Confirmed ship date ▼
Confirmed receipt date ▼

Customer requisition
Pool ▼
Created date and time 11.01.2021 08:43:00

DISCOUNTS
Line discount group RWA ▼

WAREHOUSE
Release status Open

REFERENCES
Customer reference Consignment Test

Sales order lines

[+ Add line](#) [+ Add lines](#) [Add products](#) [Remove](#) [Sales order line](#) ▼ [Financials](#) ▼ [Inventory](#) ▼ [Product and supply](#) ▼ [Update line](#) ▼ [Warehouse](#) ▼ [Retail](#) ▼

| ✓ | Li... | Item number | Product name | Quantity | Unit | Unit price | Discount percent | Net amount | Warehouse | Requested ship date | Confirmed ship date | Line type | Line |
|---|-------|-------------|--------------|----------|------|------------|------------------|------------|-----------|---------------------|---------------------|-----------|------|
| ✓ | 0 | 104043001 | JET 5 AT 20L | 100.00 | LTR | 6.60 | | 660.00 | ATC002 | 12.01.2021 | | Regular | Ope |

Check if you have sufficient stock level on the warehouse which delivers good to customers consignment warehouse

Check customers credit limit

Manage – Customer - Check credit limit

Finance and Operations Accounts receivable > Orders > All sales orders

[Save](#) [+ New](#) [Delete](#) [Sales order](#) [Sell](#) [Manage](#) [Pick and pack](#) [Invoice](#) [Retail](#) [General](#) [Warehouse](#) [Transportation](#) [Credit management](#) [Options](#) [Search](#)

Customer Check credit limit Statistics Rebates Credit card ▼ Find prices

Intercompany tracing
Intercompany sales order Purchase order
Original sales order Intercompany purchase order

Coupons Coupons

Distributed order management

i Credit limit is OK.

Y Sales order
≡ **SOAT20000082 : RWA Raiffeisen Ware Austria AG**

Confirm sales order

Sell – Generate – Confirm Sales Order

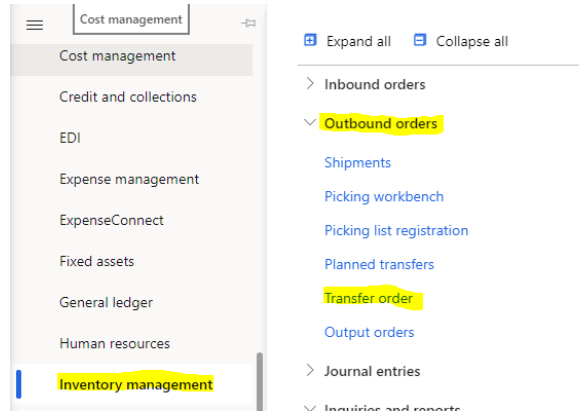
The sales order will remain confirmed with order status "open order" until the customer consumed the goods.

1.1.2. Transfer goods to customer consignment

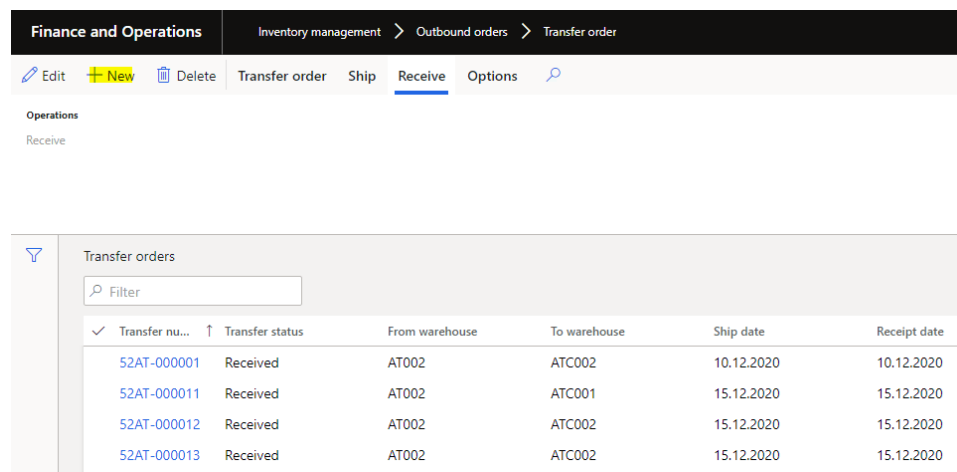
To get stock to the customer consignment warehouse, those goods must be transferred from the main warehouse to the customer consignment warehouse.

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 | order quantity from the original sales order |

Transfer orders

Transfer order: 52AT-000041

Lines Header Created

Transfer order header

AT002 ATC002 Created

OVERVIEW

From warehouse: AT002 To warehouse: ATC002 Ship date: 12.01.2021

Transfer number: 52AT-000041

Address name: LLT GESMBH, KORNEUBURG

Receipt date: 12.01.2021

STATUS

Transfer status: Created

Name or description: LLT GESMBH, KORNEUBURG

Transfer order lines

+ Add + Add products Remove Work details Charges Deliver remainder Inventory

| Item number | Transfer quantity | Ship date | Receipt date | Product name | Reserve items a... | Packing quantity |
|-------------|-------------------|------------|--------------|--------------|--------------------|------------------|
| 104043004 | 100.00 | 12.01.2021 | 12.01.2021 | JET 5 AT 20L | | 1.00 |

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

Personalize Update all

Always open for editing Personalize this page Add to workspace

Security diagnostics Advanced filter or sort Record info Change view

Edit Revert

Get a link Create a custom alert Manage my alerts

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.

.

Work Instructions

Shipment

Late selection
☒ No

Overview General

Select Default 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"/> |

Lines General Dimensions

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

Transfer order header

Lines Header Shipped

AT002 ATC002 Shipped

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 customers consignment warehouse.

After the customer consumed the consignment goods you can proceed with the sales order process

1.1.3. Consume consignment stock

To consume and invoice the customer consignment goods return to the original sales order and perform the steps as known from the regular sales order process.

Generate Picking list

Pick and pack – Generate – Generate picking list

To pick the full quantity of the consignment order just click OK.

To pick a partial quantity adjust the quantity on line level in field "Update" down to the quantity you would like to invoice. Please do not exceed the total quantity of the sales order. The field "Remaining quantity" will show you the goods from this consignment (sales) order which are not consumed yet.

Posting picking list

Arrange Select Printer setup

| ✓ | Update | Customer packi... | Sales order | Name | Currency |
|---|--------------|-------------------|--------------|--------------------------------|----------|
| | Picking list | | SOAT20000082 | RWA Raiffeisen Ware Austria AG | EUR |

Setup

Lines

Delete Sales order line Inventory Reset batch disposition code Update line

| ✓ | Sales order | Batch number | Available | Product number | Item number | Update | Net amount | Scrap | Mode of delivery | Delivery name | Remaining qua... |
|---|--------------|--------------|-----------|----------------|-------------|--------|------------|--------------------------|------------------|--------------------------------|------------------|
| | SOAT20000082 | | 120,00 | 104043001 | 104043001 | 40,00 | 264,00 | <input type="checkbox"/> | TRUCK | RWA Raiffeisen Ware Austria AG | 100,00 |

Picking List Registration

The picking list registration shows the picked quantity. Choose the same batch number used during the warehouse transfer. The on-hand inventory should show you only batches available on customer consignment stock

Picking list registration

SOAT20000082 : RWA RAIFFEISEN WARE AUSTRIA AG

PLAT20000114

Identification

Picking route

PLAT20000114

Handling status

Activated

Shipment

52AT-000114

Reference

Sales order

Picking route details

On-hand

View available

Range inventory dimensions

| Batch number | Warehouse | Location | License plate | Inventory status | Site | Attribute |
|--------------|-----------|----------|---------------|------------------|------|-----------|
| 999-NL | ATC002 | DEFAULT | | AVAILABLE | 01 | |
| Test123 | ATC002 | DEFAULT | | AVAILABLE | 01 | |

Choose batch, click Update – Update all. Handling status will change from “Activated” to “Completed”.

| Lines | | | | | | |
|---|-----------------|-------------|---------------|-----------|----------|--------------|
| Functions ▼ Output orders Inventory ▼ Register serial numbers | | | | | | |
| Select | Handling status | Item number | Pick quantity | Warehouse | Location | Batch number |
| <input type="checkbox"/> | Completed | 104043001 | 40,00 | ATC002 | DEFAULT | Test123 |

Post Packing slip

Pick and pack – Generate – Post packing slip

Click OK to generate the packing slip for the quantity to be invoiced.

Generate Invoice

Invoice – Generate – Invoice

Click OK to generate the invoice for the quantity to be invoiced.