Sales Transfers

Megan De Freitas - 2024-12-03 - Sales

Overview

The Sales Transfer function allows the user to create a transfer order for all items included on a sales document set up with a workflow. When the transfer order is completed, the sales document is deleted. This functionality allows for an audit trail to be created for tracking the status of a transfer order. A sales transfer is a sales document used to transfer inventory to a new site or location, which is then voided so it does not become part of the sales record. Refer to the SalesPad Workflow documentation for information on setting up workflow.

Usage

Note: Use of this function requires that a sales document be set up to be routed correctly, and that addresses have been stored for the inventory locations that are to be transferred from and to. Document types are set up in Microsoft Dynamics GP.

On the Customer card, there must be a Contact Address with the same Address Code as the Location (warehouse) items are being transferred to.

Create a transfer order (a sales order using the sales document type that has been set up to be routed through the transfer order workflow). We recommend setting up a separate sales document in Microsoft Dynamics GP exclusively for these transfers.

On the order header, select the address that items will be transferred out of.

Enter the desired items that are to be transferred to a different warehouse.

On the Addresses tab, select the address for the warehouse that items are to be transferred to.

Save the order.

To create the corresponding transfer order, navigate to to the Sales Transfers module.

To search for items, enter any search criteria, then click **Search** or hit **Enter**. Users can search by Sales Batch, Sales Document, and Customer Name or Number.

Note: Results are displayed by Item Number, but will be transferred by document.

Note: Results not displayed in the grid due to auto-filtering will still be transferred when Create Transfers is clicked:

Click **Create Transfers** to transfer documents. All orders listed in the grid with a Qty Fulfilled greater than 0 will be gathered for creating transfer orders.

Click **Yes** when prompted.

The following screens will appear during the transfer process:

When the process is finished, click **Close**. Results will appear in the following window, including any errors in transferring documents.

Click **Print** to print the information (or email or export to a document from the Print Preview), or click **OK** to close the screen.

Line items that have been completely transferred will be removed from the corresponding sales order. If no other items are on the sales order, the document will be removed from the system.

If a line item is partially transferred, the document will be forwarded to the next applicable queue.

Security

Sales Transfers - Grants access to the Sales Transfers module.

Note: The *Transfer To Bin User Field* sub-security allows users to specify a User Defined Field (UDF) for setting which bin the transferred inventory is delivered to. To use this security setting, it is recommended that the UDF is set with a Quick Report. For example, here is a Quick Report that will populate the UDF with the Bins from the Destination location:

For more information on setting up UDFs, see the [User Defined Fields documentation.]()

Settings

Sales Transfer Date Source - The sales document header field that will drive the date to Inventory Transfers from the Sales Transfers screen. Blank assumes today's date. This item has no default value.