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Sales Transfers

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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 [Desktop: Workflow](#) 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.

Contacts + New - Delete Mark As - Create Letter		
Address Type	Address Line 1	Address Code
MAIN/BILL TO/SHIP TO/STATE...	One Microsoft Way	NEW
	2513 Stockwood Dr. NE	PRIMARY
	11403 45 St. South	WAREHOUSE

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.

(ORDER) x

Close | Save | Print | Delete | Copy | Allocate | Unallocate | Dynamics GP

Document Properties

Document #:

Customer #: AARONFIT0001 ...

Cust PO:

Req Ship: 12/5/2018

Ship Method: LOCAL DELIVERY

Whse: **NORTH**

Currency: Z-US\$

Line Items | Notes | Addresses | Holds | User Fields | Audit | Related Documents | Purchases | Quick Rep

New | Delete | Insert

Item Number: HD-20 | UoM Schedule: EACH

Item	Description	Qty
! HD-20	20 Gig Hard Drive	250

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.

(ORDER) X

Close Save Print Delete Copy Allocate Unallocate Dynamics GP

Document Properties

Document #: ORDE

Customer #: AARONFIT0001 ... Aar

Cust PO: Sales I

Req Ship: 12/5/2018 Sales

Ship Method: LOCAL DELIVERY Pay Te

Whse: NORTH Doc Di

Currency: Z-US\$ Creat

Line Items Notes Addresses Holds User Fields Audit Related Documents Purchases Quick Report

Ship To Address

Address Code: WAREHOUSE

Ship To Name: Aaron Fitz Electrical

Ship to Contact:

Address: 11403 45 St. South

City: Chicago

State: IL

Zip: 60603-0776

Country Code: Country:

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.

Sales Transfers X

Close Search (65 Pending Transfers) Create Transfers

Search Criteria

Sales Batch: Sales Document: Customer:

Sales Batch	Site	Sales Doc ...	Customer	Item Number	Item Descrip...	Ship To Addr...	Quantity	Qty Fulfilled
NEW ORDMAN	WAREHOUSE	ORDM00000...	Aaron Fitz El...	HD-20	20 Gig Hard ...	WAREHOUSE	250	0

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

Close Search (4 Pending Transfers) Create Transfers

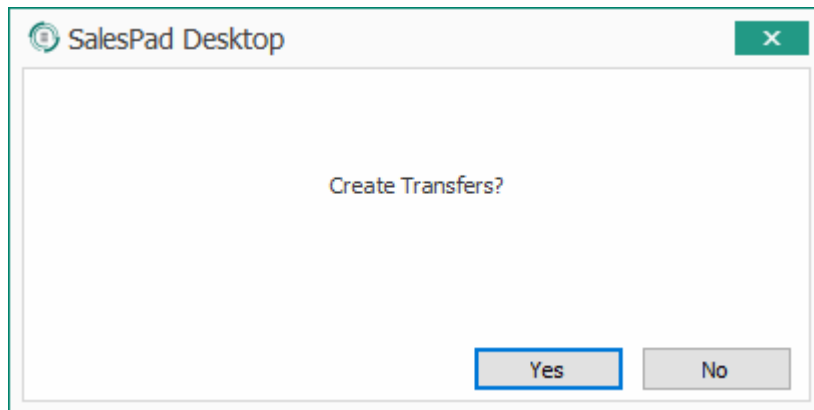
Search Criteria

Sales Batch: PENDING Sales Document: Customer: adam park

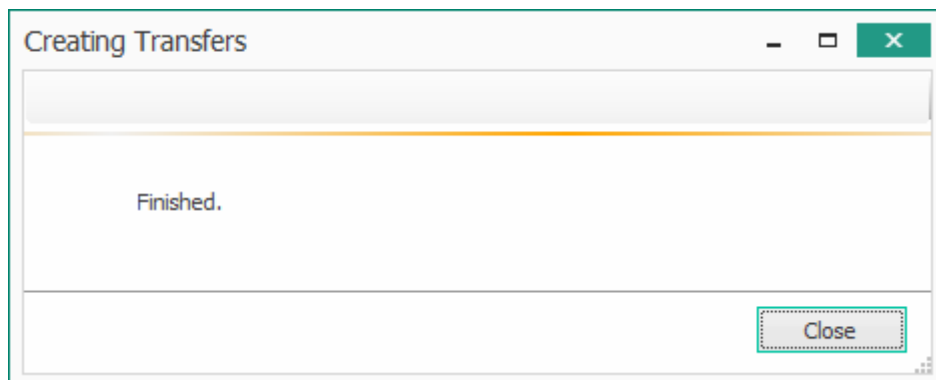
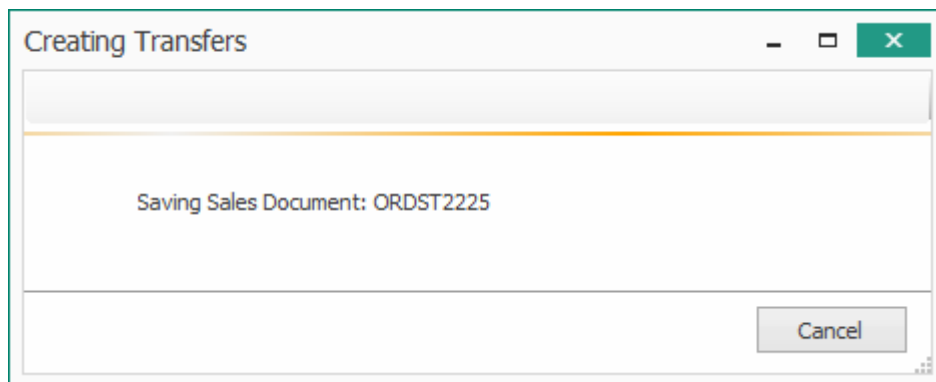
Sales Batch	Site	Sales Doc Num	Customer	Item Number	Item Descrip...	Ship To Addr...	Quantity	Qty Fulfilled
				M1500				
PENDING	NORTH	ORD2893	Adam Park Resort	M1500	15" Monitor	BILLING	3	0

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.

Sales Transfers at 2018/12/05 3:57 PM

Print

Sales Doc Type	Sales Doc Num	Message
ORDER	ORDST2229	Item Number 128 SDRAM does not have any fulfilled items. It will not be transferred.
ORDER	ORDST2229	Item Number 24X IDE does not have any fulfilled items. It will not be transferred.
ORDER	ORDST2229	Item Number ACCS-CRD-12WH does not have any fulfilled items. It will not be transferred.
ORDER	ORDST2229	Item Number ACCS-RST-DXBK does not have any fulfilled items. It will not be transferred.
ORDER	ORDST2229	Item Number ACCS-RST-DXWH does not have any fulfilled items. It will not be transferred.
ORDER	ORDST2436.2	Item Number HD-20 does not have any fulfilled items. It will not be transferred.
ORDER	ORDM000000...	Item Number HD-20 does not have any fulfilled items. It will not be transferred.
ORDER	ORDST2225	EConnect error executing taIVTransferLineInsert: You cannot transfer the same qty types at the same location (5018). Item Number: FAXX-SLK-2100, Line Number: 16384
ORDER	ORDST2227	EConnect error executing taIVTransferLineInsert: The To Location Code/Site ID (TRNSTLOC) is not assigned to the Item Number (ITEMNMBR) passed in (1376). Item Number: 128 SDRAM, Line Number: 16384
ORDER	ORDST2229	EConnect error executing taIVTransferLineInsert: The To Location Code/Site ID (TRNSTLOC) is not assigned to the Item Number (ITEMNMBR) passed in (1376). Item Number: 4.5HD, Line Number: 16384
ORDER	RMA002001	EConnect error executing taIVTransferLineInsert: The To Location Code/Site ID (TRNSTLOC) is not assigned to the Item Number (ITEMNMBR) passed in (1376). Item Number: 3-J2094A, Line Number: 16384
ORDER	ORDST2230	EConnect error executing taIVTransferLineInsert: The To Location Code/Site ID (TRNSTLOC) is not assigned to the Item Number (ITEMNMBR) passed in (1376). Item Number: 128 SDRAM, Line Number: 16384

OK

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:

SalesPad

Quick Report XML:

```
<report name="Sales Line Transfer Bin UDF" ReturnColumn="Bin">
<query addWhere="false">
<![CDATA[
select Bin from spvBin
where spvBin.Location=/*Ship_To_Address_Code*/
]]>
</query>
</report>
```

OK Cancel

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

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.