Create Agency to Agency Transfer Order

Description

Use this task to create an agency to agency transfer order. This transfer order is created in the Vendor portal to move items from one agency to another.
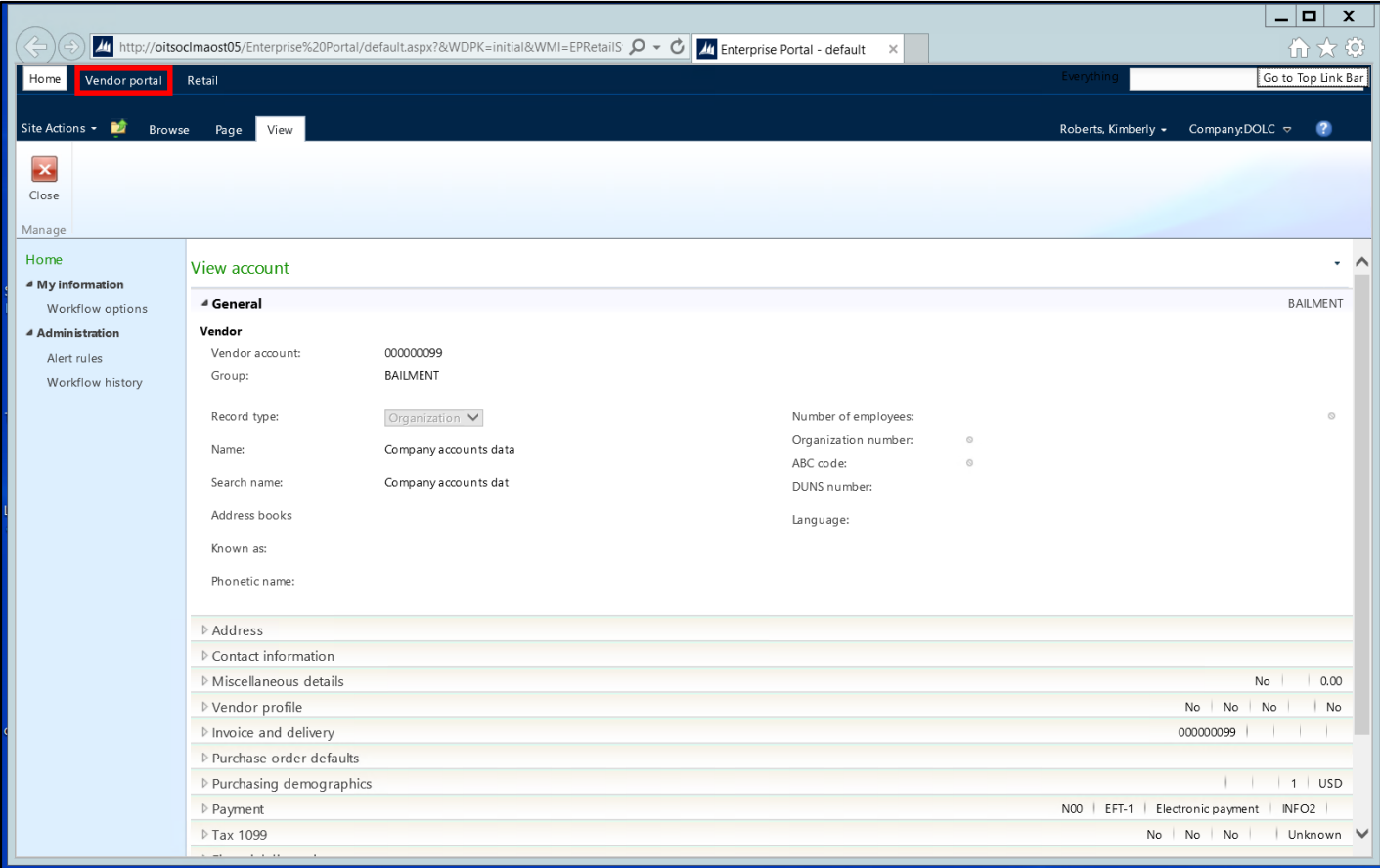
Trigger

Perform this task when there is a need to move inventory from one agency to another.

Prerequisites

The vendor/broker has determined the from and to agencies, and the items and quantities by confirming the inventories at both agencies.

Procedure

1. Begin this task by logging into the portal.

2. Click [Vendor portal] on the toolbar.

3. Click **Transfer orders** in the Vendor portal panel.

4. Click [Transfer order icon] to create a new transfer order.

5. Click ▾ in the **From** field and select the desired agency number from the drop-down list. This is the agency shipping the items. In this example, select "10100".

🔴 The agency number can also be entered directly into the **From** field.

6. Click ▾ in the **To** field and select the desired agency number from the drop-down list. This is the agency the items are being shipped to. In this example, select "10101".

🔴 The agency number can also be entered directly into the **To** field.

7. Click ▾ in the **Mode of Delivery** field and select the desired mode of delivery. In this example, select "Courier".

8. Click Create to add items.

9. Click ![Add items] under the **Transfer order lines** section to select items for transfer.
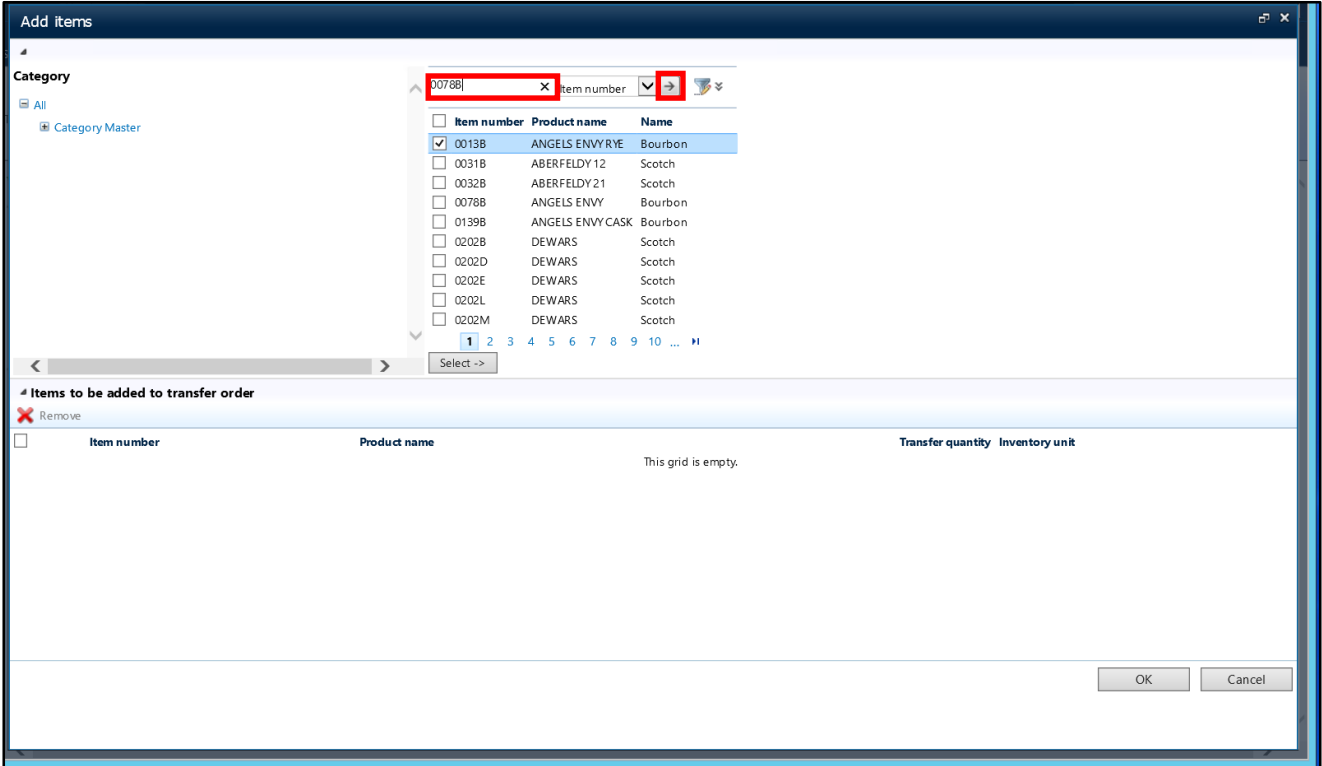
10. Enter the item number in the **Item number** field. In this example, enter "0078B".

The item can also be selected from the displayed list.

11. Click → to filter on the entered item number.

12. Select ☐ to the left of the desired **item number**.

13. Click Select -> to bring the selected item into the item grid,
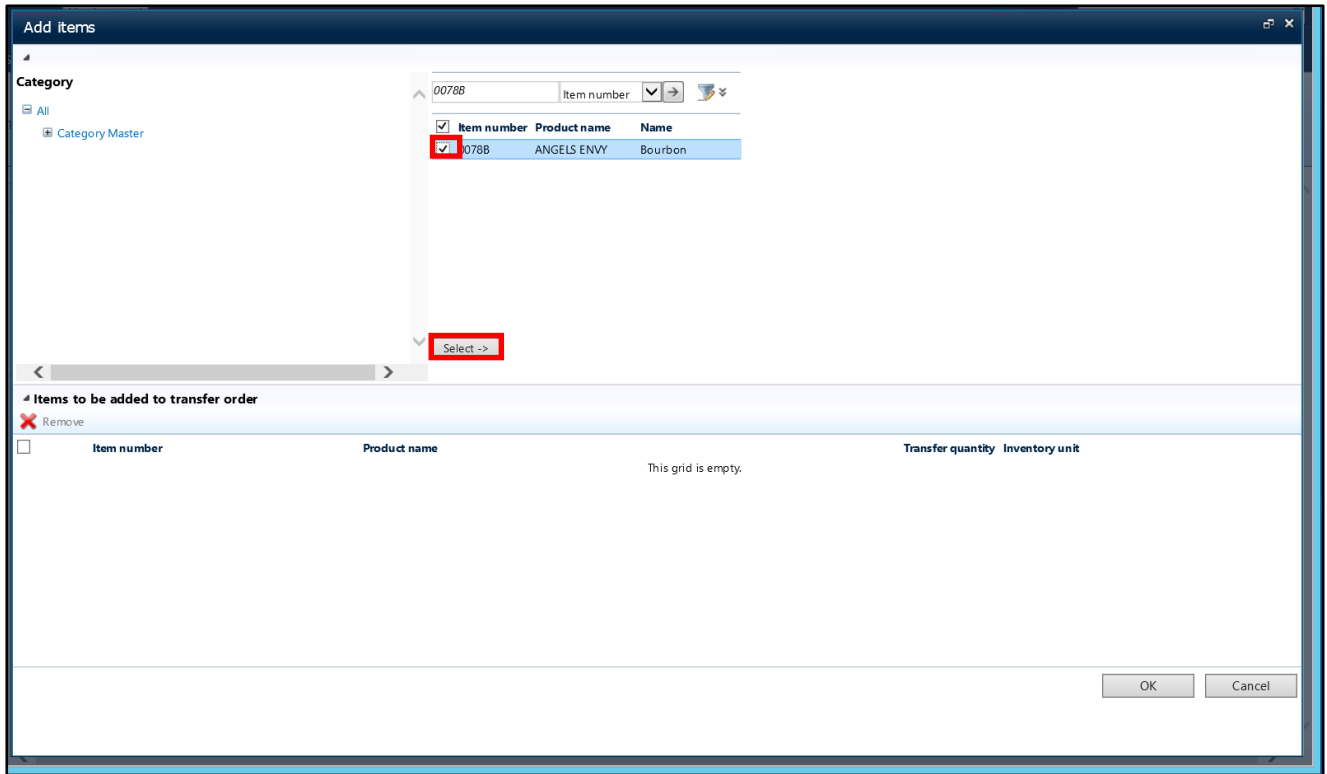
14. Update the default entry in the **Transfer quantity** field to reflect the quantity of bottles to be transferred. In this example, enter "18.00."

The default quantity in this field is bottles per case.
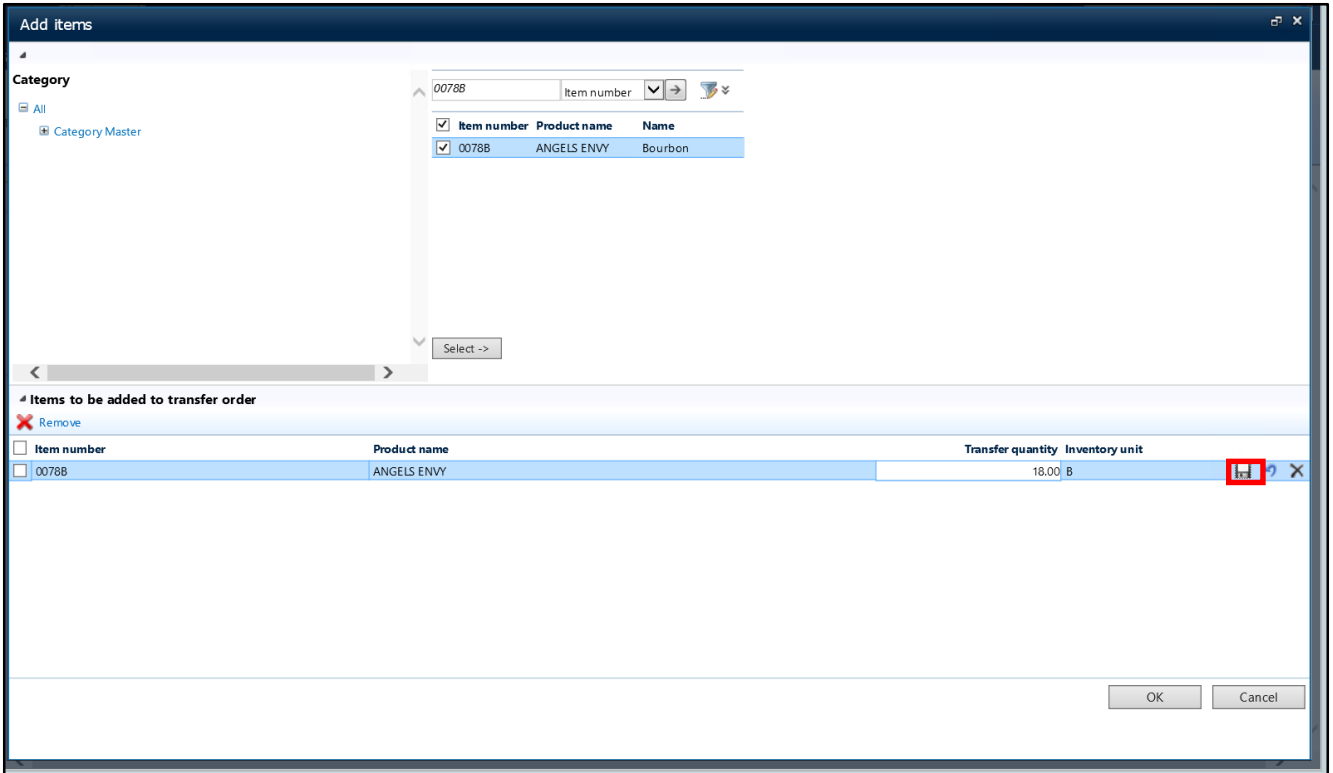
15. Press "Tab" on the keyboard.

16. Click 🖫 to update the line item.

💡 Once updated, the entire line will turn blue.

17. Click [OK] .

To enter additional items, follow Steps 10 - 17.
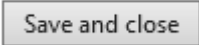
18.	To Save and Submit:	To Save and Close:
	Click [Submit] and go to Step 19.	Click [Save and close]. You have completed this task and can submit at a later time.
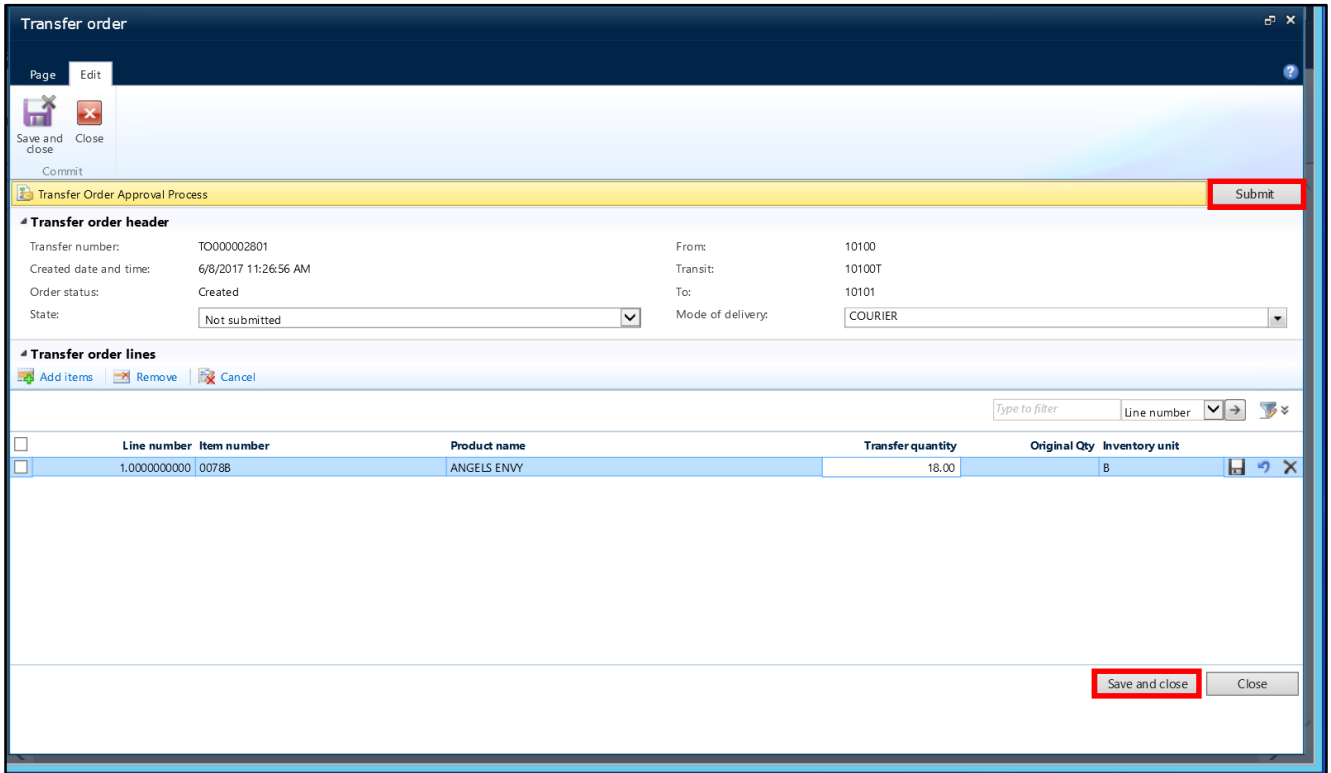
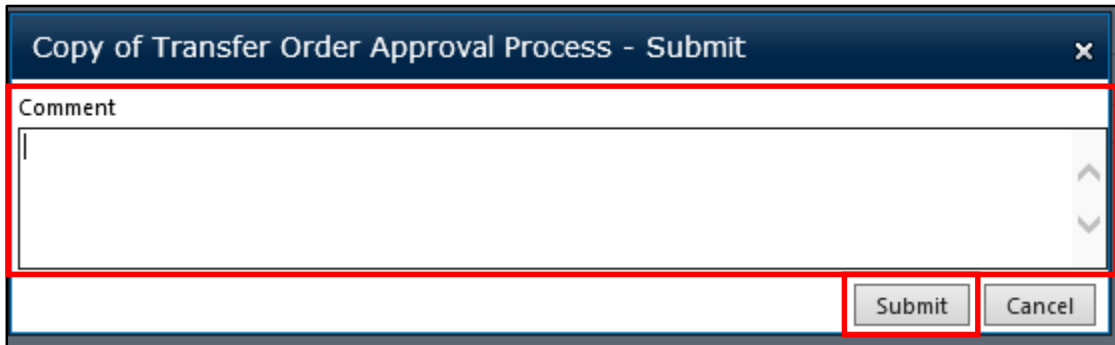19. Enter comments in the **Comments** field if desired.

20. Click [Submit] to complete the task.

After clicking [Submit], the State of the order will change to "Submitted" and awaits manual approval from the DOLC. Upon DOLC approval, the State of the order will become "Approved".

Results
You have created an agency to agency transfer order.