

Creating a Transfer from a Sales Order

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Overview

There are 2 main reasons your company needs to create transfers from Sales Orders.

1. You want to treat a location as though they were a customer. A sales order is a great way to prepare stock. You can create linked purchases and linked work orders or the items on approved sales order create demand on the reorder analysis.
2. You sell via consignment or send stock to a location before it's used.

Enable Transfer from Sales Order

Navigate to [Preferences](#) -- > [Sales](#) and click the Advanced Tab the check 'Enable creating a transfer from a sales order.'

Once this is checked you will see another another preference 'Transferring from a sales order is used for consignment'.

When unchecked:

- The Transfer uses the sales order location as the **From** location on the transfer
- The Transfer fills the sales order like a ship doc would.

When checked

- The Transfer uses the sales order location as the **To** location on the transfer
- The Transfer does not fill the sales order. A ship doc is created to fill the sales order.

Usage

1. Open and approve a sales order
2. Click Transfer
3. Enter the To or From Location as appropriate.
4. Transfer with sales order line items is created.

A new column on the transfer list called SO No will help reference which sales order originated the transfer.