

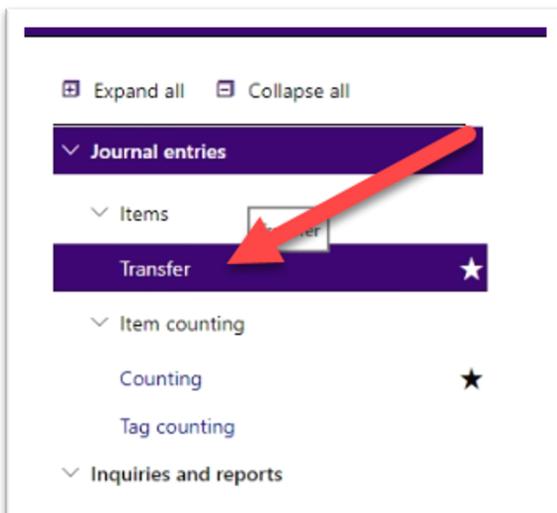
SECTION: M&amp;S CONTROL

SUBJECT: Procedure- Transfer Product to a Truck

**SPP No.:** 804**Section:** M & S Control**Subject:** Procedure- Transfer Product to a Truck**Approved By:** Tony Massey**Effective Date:** December 21, 2021**Last Reviewed Date:** December 21, 2021**Policy Owner:** ERP & Finance Manager

Service Managers are responsible for properly issuing and recording all products transferred from the Office Warehouse to a service vehicle. “Transfer Journals” must be completed immediately following any issuance from Warehouse (W-SCxxx) to a service vehicle (TLxxxxxx). However, all purchase orders must first be received in D365, ensuring materials are available for transfer (See SPP 803 Receive a Purchase Order).

1. Click “Expand all” and then “Transfer”.



2. Click on “New” (found on the top left).

APPROVED BY:  
Tony MasseyEFFECTIVE DATE:  
December 21, 2021

Page 1 of 10

SECTION: M&S CONTROL

SUBJECT: Procedure- Transfer Product to a Truck

3. The Overview window, as seen in the picture below, will default to the correct information.
4. Click on “OK” (bottom right).

Create inventory journal

**Overview**

**IDENTIFICATION**

Journal: MSC-151803

Name: InvTrfr

Description: Inventory Transfer Journal

**General**

**VOUCHER**

Voucher series: Inve\_20

Selection by: Posting

New voucher by: Change date

**POSTING**

Detail level: Details

Delete lines after posting: No

Offset account:

**Setup**

**INVENTORY**

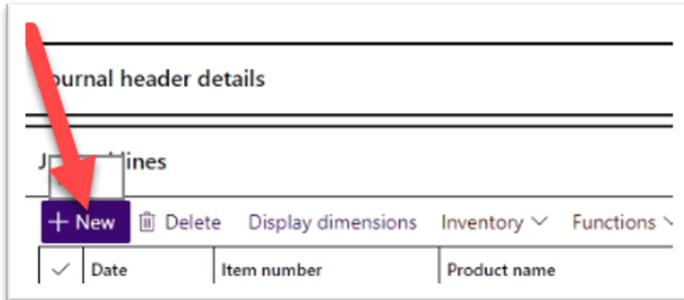
Reservation: Manual

OK (Alt+Enter) OK Cancel

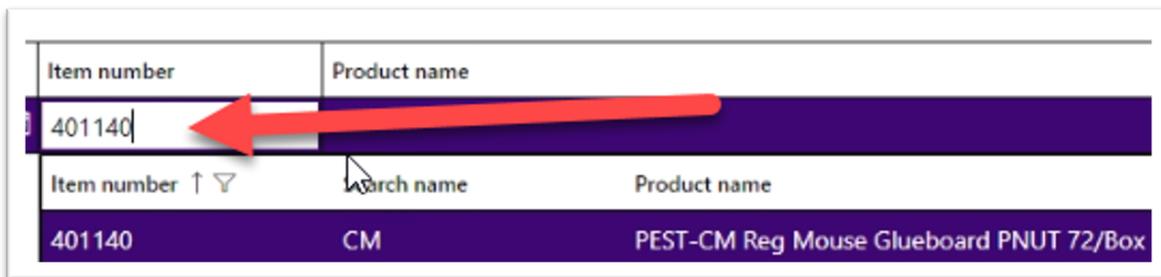
SECTION: M&amp;S CONTROL

SUBJECT: Procedure- Transfer Product to a Truck

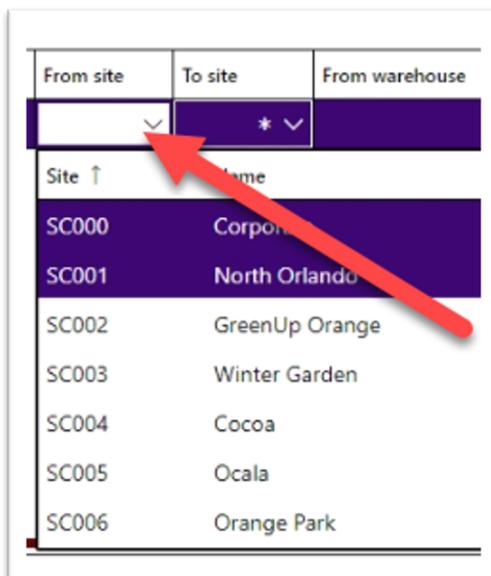
5. Click “New” (found in the top left corner of the Journal lines window).



6. In the Item Number field, click to enter product number or name. A drop-down box will appear as you begin to enter the product number. You may click to choose the correct product from the drop-down box. Make sure the date reflects the day of the transfers.



7. Click “From site” field to open drop down box and choose the correct service center.

APPROVED BY:  
Tony MasseyEFFECTIVE DATE:  
December 21, 2021

Page 3 of 10

SECTION: M&S CONTROL

SUBJECT: Procedure- Transfer Product to a Truck

- 8. Click "To site" field to open drop down box and choose the correct service center. It should be the same as the From Site

To site	From warehouse	To warehouse
Site ↑		
SC000	Corpora	
SC001	North Orlando	
SC002	GreenUp Orange	
SC003	Winter Garden	

- 9. Click "From warehouse" field to choose your service center.

From warehouse	To warehouse	From location	To location
Warehouses			
Warehouse ↑	Name	Site	
TL2341	Jaziza Vazquez	SC001	
TL3313	Dwayne Leon Hall	SC001	
TL3433	Jericho I Sparks	SC001	
TL3544	Matthew D. Emert	SC001	

- 10. Click "To warehouse" field to choose the correct truck/technician who will be using the product on their truck.

To warehouse	From location
Warehouses	
Warehouse ↑	Name
TL1012	Jaziza

SECTION: M&amp;S CONTROL

SUBJECT: Procedure- Transfer Product to a Truck

11. Click “From location” to choose your service center from the drop-down menu.

From location	To location	Quantity	Log
<input type="text"/>	▼	-1.00	

Locations		
Location	Site	War
L-SC001	SC001	W-

12. Click “To location” to choose correct truck/technician who is using the product.

From warehouse	To warehouse	From location	To location
▼ W-SC001	▼ TL1012	▼ L-SC001	▼ <input type="text"/>

Locations		
Location	Site	Warehouse ↑
TL1012	SC001	TL1012

13. Enter the quantity of product being transferred. Make sure the quantity matches up with the unit. If the Unit column is not visible, contact AX Support to add .

Quantity	Log	Unit
<input type="text"/>	-5.00	Trap

14. If you have another product to transfer, repeat steps 7-15.

APPROVED BY:  
Tony MasseyEFFECTIVE DATE:  
December 21, 2021

Page 5 of 10

SECTION: M&amp;S CONTROL

SUBJECT: Procedure- Transfer Product to a Truck

- Once all products are entered click “Post” (found in the top menu under the Finance and Operations bar).



- Click OK

### Transferring Products to a Truck Using the iPad

- Log-in to Dynamics AX on the iPad.
- Tap “Inventory Transfer Journal”.



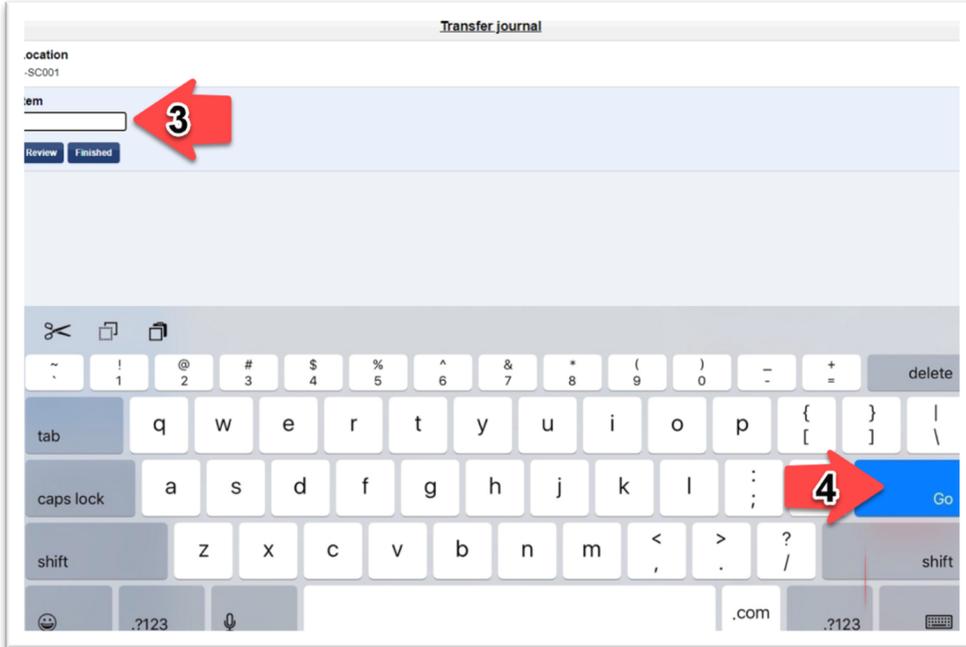
- Type in product number or scan the barcode.
- Tap “Go”.

APPROVED BY:  
Tony MasseyEFFECTIVE DATE:  
December 21, 2021

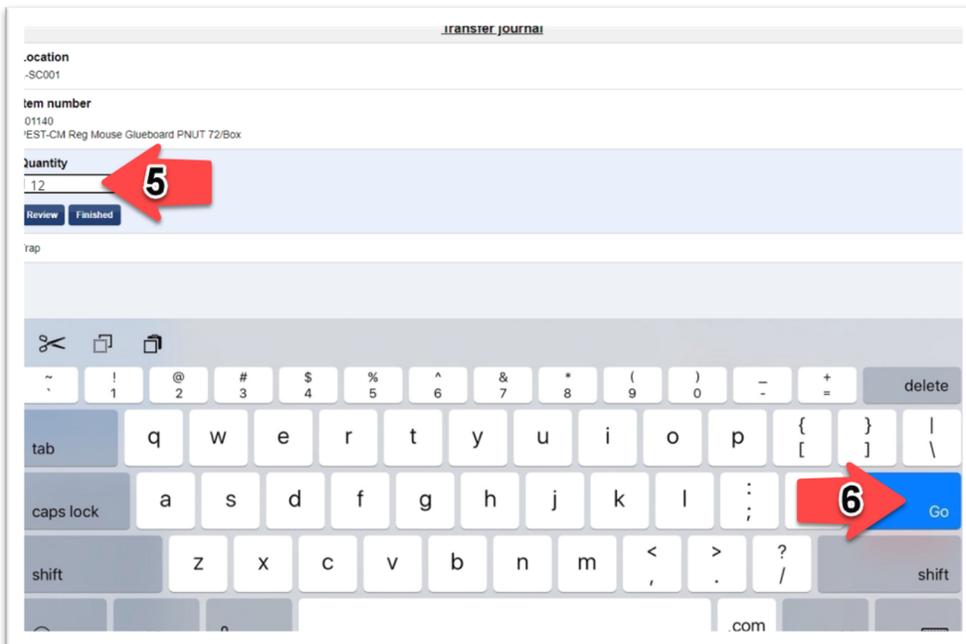
Page 6 of 10

SECTION: M&S CONTROL

SUBJECT: Procedure- Transfer Product to a Truck



- 5. Type in Quantity. Make sure the quantity matches the unit.
- 6. Tap “Go”.



APPROVED BY:  
Tony Massey

EFFECTIVE DATE:  
December 21, 2021

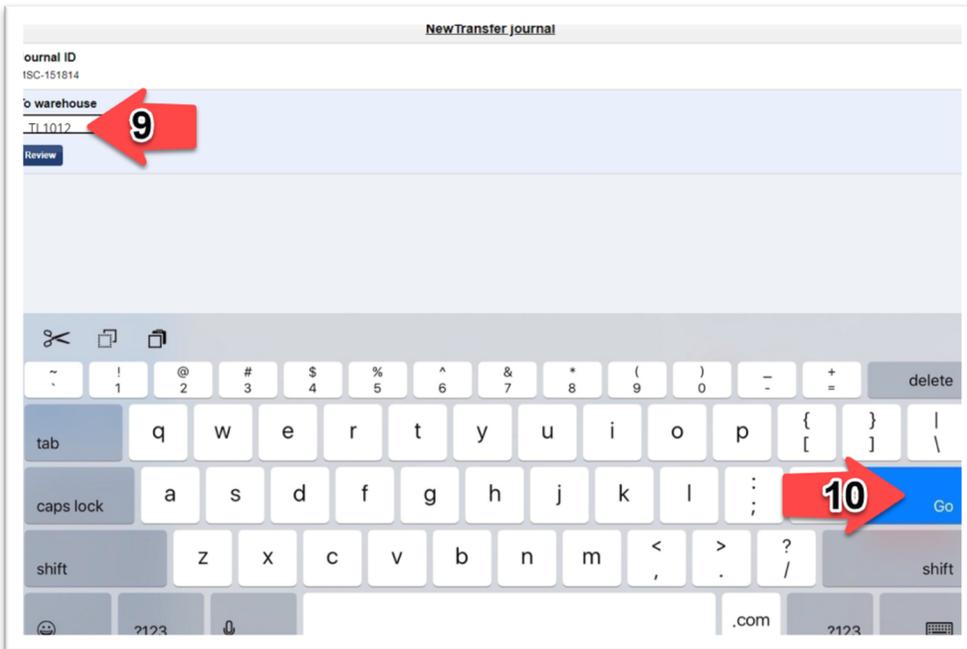
SECTION: M&S CONTROL

SUBJECT: Procedure- Transfer Product to a Truck

- 7. If there are more products to transfer, repeat steps 3 through 6.
- 8. If all products are transferred, tap “Finished”.



- 9. Enter the warehouse number or scan the barcode for the vehicle.
- 10. Tap “Go”.



- 11. Once the iPad transfers are complete, log-in to Microsoft D365 on your computer.

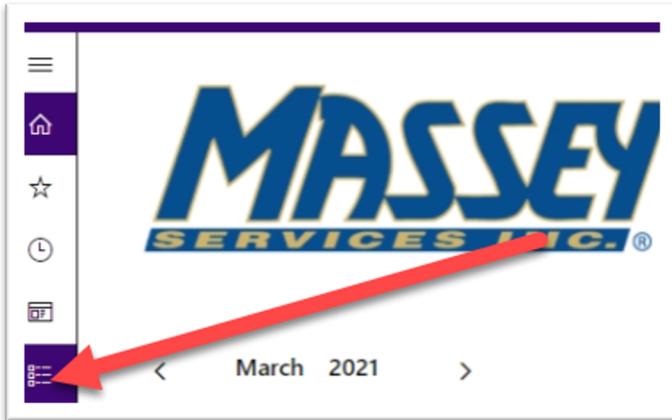
APPROVED BY:  
Tony Massey

EFFECTIVE DATE:  
December 21, 2021

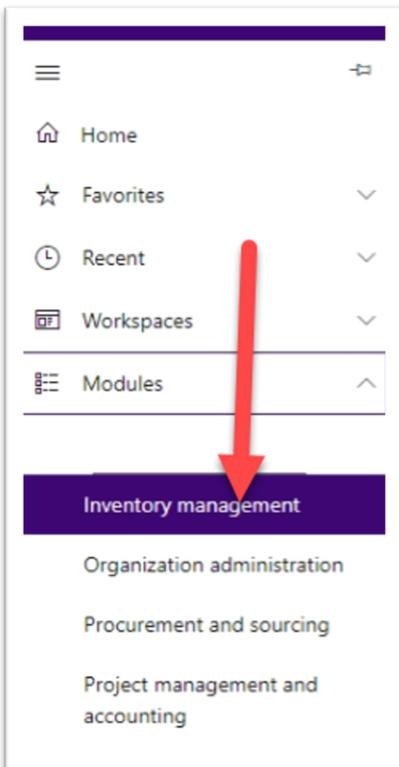
SECTION: M&S CONTROL

SUBJECT: Procedure- Transfer Product to a Truck

12. Click on the 3 bars icon in the left menu bar to access the modules.



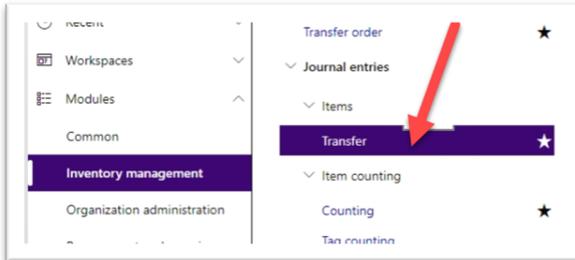
13. Click on “Inventory Management”.



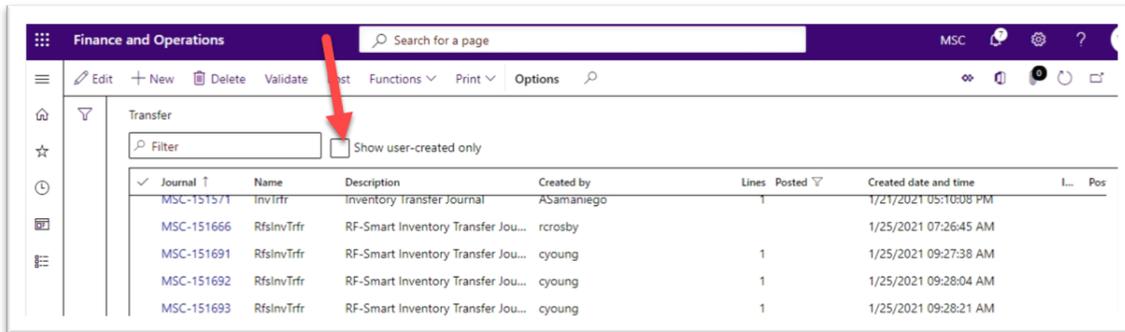
SECTION: M&S CONTROL

SUBJECT: Procedure- Transfer Product to a Truck

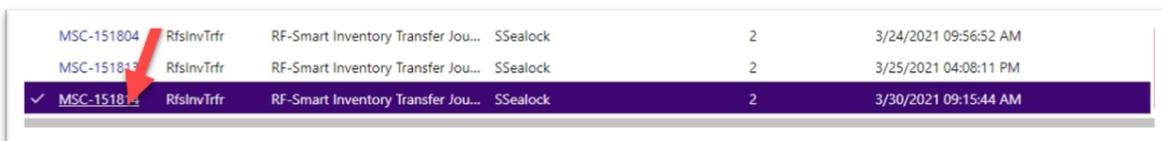
14. Click “Transfer”.



15. Click “Show user-created only”



16. Scroll to find the Inventory Transfer just completed on the iPad (newest entries are on the bottom) and click on the MSC-#####.



17. Review the details in the Journal Lines window.

18. Click “Post”.



19. Click “OK”.

APPROVED BY:  
Tony Massey

EFFECTIVE DATE:  
December 21, 2021