TULCO OILS	Inter-Company Transfers SOP 120 Revision E 01/07/2018 Approved by: Don Stanton

PURPOSE:

Inter-company transfer orders allow material to be transferred from one facility to another, within the company. The use of an inter-company transfer, rather than an Inventory Move, allows paperwork like pick lists and bills of lading to be printed, and can account for material currently in transit as well as material lost in transit. The transfer facility from the ship-to is the receiving location, and the Facility on the order header is the shipping facility. When the ship-to is selected, the order type will automatically change to Inter-company transfer because the ship-to has a Transfer facility selected on its order default tab.

PROCESS STEPS:

1. Navigate to **Sales > New Sales Order**
2. On the General tab:
    a. Select "TULCO OILS, INC." Bill-To Company by clicking on the magnifying glass.
    b. Select appropriate "*Facility to Facility*" (Choose proper City) Ship-To Company by clicking on the magnifying glass. (i.e., Tulsa to Okc, Tulsa to Van Buren…)
    c. Enter the Facility where the product will be shipped from by clicking on the magnifying glass to select
        Note: This order type will change to Inter-Company Transfers.
    d. Enter today's date into the Bill-To PO field, and Ship-To PO if that information is provided
3. On the Misc1 tab,
    a. Confirm the Freight and Ship Via fields are correct. If incorrect, change by clicking on the magnifying glass and selecting another option.
4. Click the Dates tab and fill in the applicable date fields:
    a. Enter the **Wanted** Date
    b. The Due to ship date will calculate based on the delivery lead time.
        Note: Due to ship is the date used to drive demand in MRP and must be filled in for demand to flow properly.
5. Click the Add button to begin adding parts to the sales order. The 'Edit Sales Order Line' window will open.
    a. In the Part Number box, click on the magnifying glass to search for the part.
        Note: If you do not know the product number, Click Contains button and type description in "Search all columns…" bar
    b. Enter the Quantity for the part
    c. Click Next to add additional parts.
6. Return to the General Tab
7. Click Save – this will generate an order number in the Order Number field

Note: All sales orders can be viewed and edited by navigating to Sales > Sales Order Management and clicking on the 'View' magnifying glass with order type set to "Sales Order" and order status set to 'all orders' or 'not shipped.'

REVISIONS

Rev	Date	Change
I/R	12/01/17	New
A	5/10/18	Moved steps to align with other SOPs
B	8/7/18	Change TULCO OILS, INC. in Bill-To/Ship-To
C	8/8/18	Today's date for Bill-To PO
D	8/27/18	Remove Unit Pricing & Drum Deposits
E	1/7/19	Change to TULCO OILS, Inc Bill-To