



Summary

The Orchestrated Inventory app enables the processing of purchase orders, sales orders, inventory counts and inventory transfers. Designed for on-the-go, away-from-computer activities, the Inventory Transfer feature allows a user to create a new inventory transfer or to process a transfer request previously created from the desktop. We'll take you through both options for transfers below.

Getting Started

From your iPad, you'll need to download the Orchestrated Inventory App from the App Store (search for 'orchestratedbeer'), which is free to download and try out the demo version. After purchasing a user, Orchestra will send you login credentials so you can access your Live database and begin processing inventory transactions.

The login credentials consist of 4 case- and space-sensitive fields: Server URL, Database Name, Username and Password:

Log Out Orchestrated Inventory About

ORCHESTRATED

ORCHESTRATED

Server URL goes HERE

Database name goes HERE

Username goes HERE

Password goes HERE

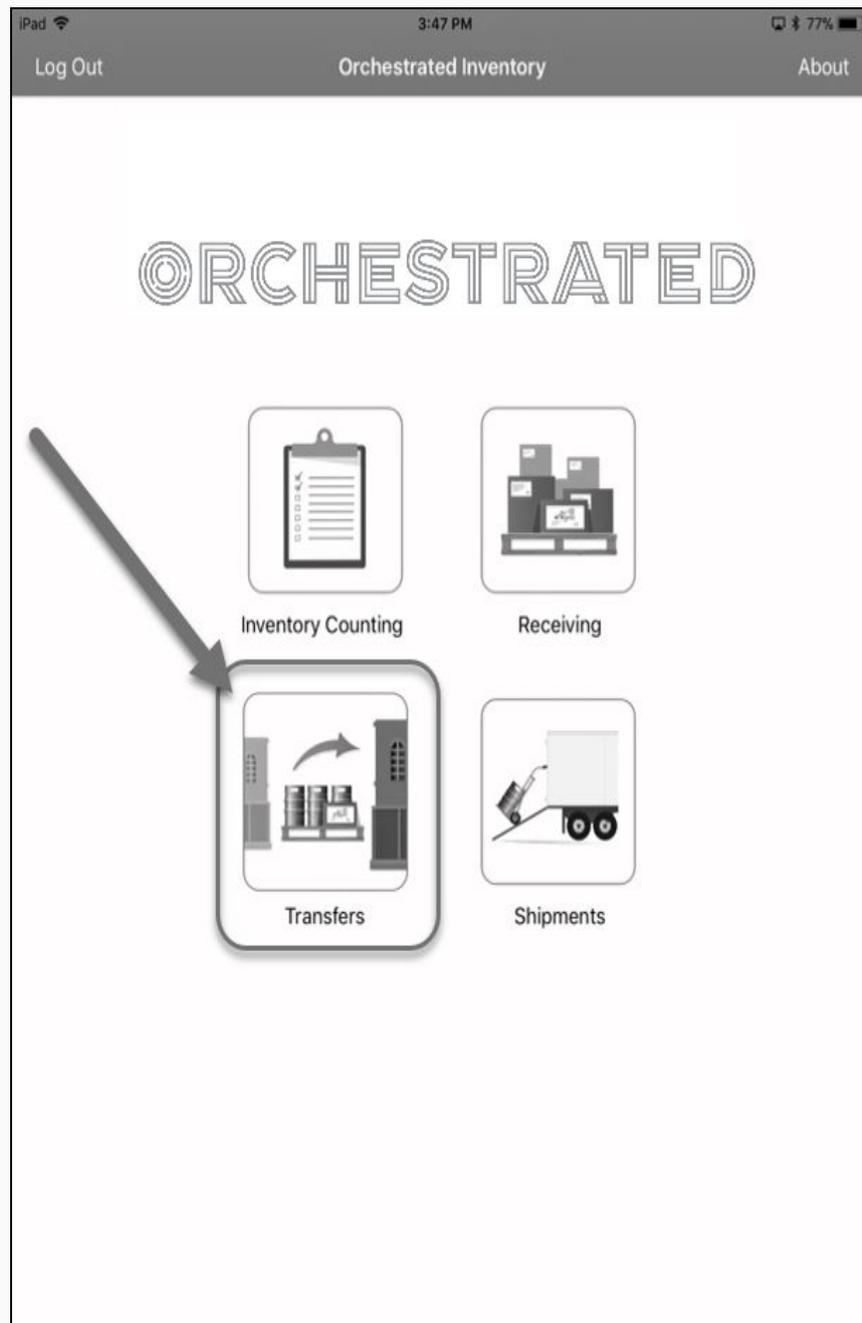
Use Demo Database

Remember password? Log In



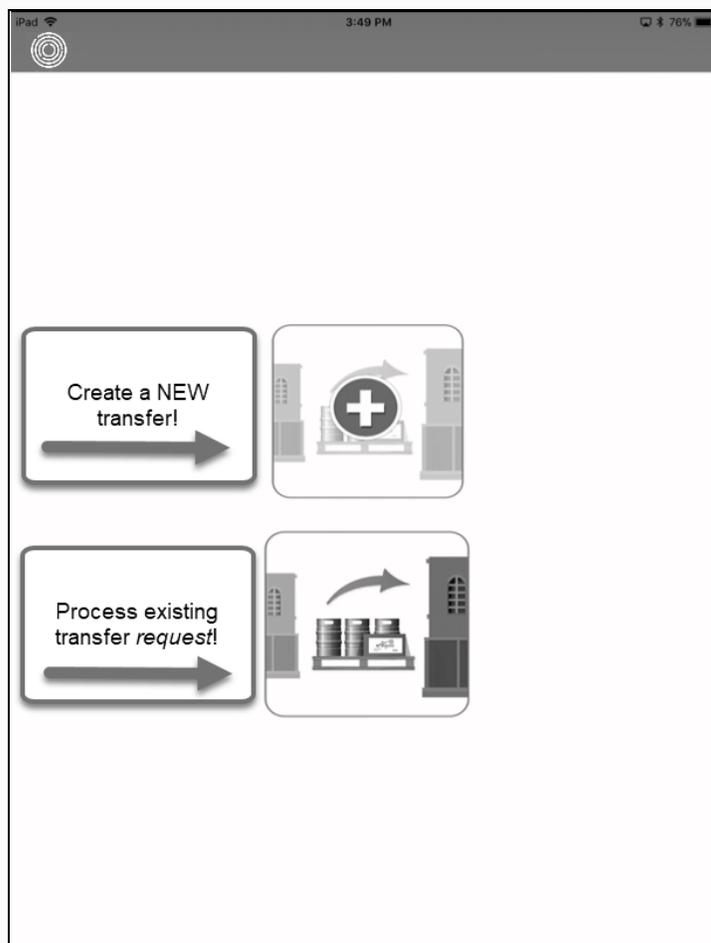
If you've already purchased the Orchestrated iPad Inventory app, you may need to **update** your app from the App Store to see the latest and greatest features!

Once logged in, click the Transfers section in the Bottom Left.





Next, you'll select to either create a new transfer or process an inventory transfer request already created.



Create Transfer

This option allows the user to create a new Inventory Transfer on the spot, that's sent back into Orchestrated immediately upon submission. This functionality works great right after moving inventory between buildings or across the warehouse, updating the locations of your items in your database timely.

1. The user is first shown a blank Inventory Transfer, ready for items to be added. Get started by selecting from and to warehouses or by tapping Add New Item.
2. To select warehouses, tap Set Whs to reveal a scroll wheel of the warehouses in your database. Scroll then tap to select the warehouse inventory is being transferred from and then perform the same steps to select which warehouse that inventory has been moved to.



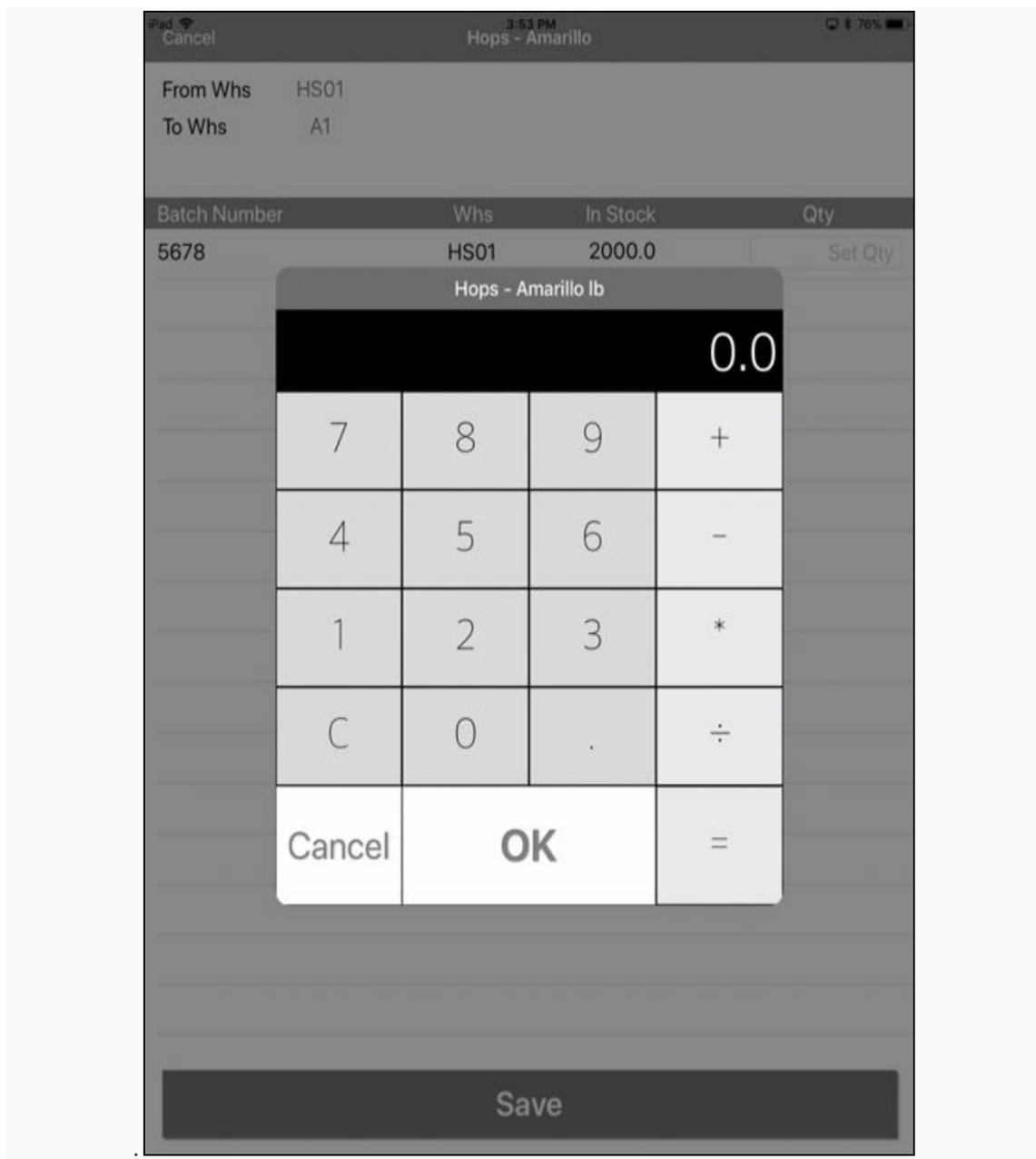
3. To add items to the transfer, the user will click Add New Item and can search for items by their Item Name, Item Code, or Item Group and tap to add each item one at a time. Items must be in stock in order to be selected for a new transfer.

The screenshot shows the 'New Transfer' interface on an iPad. At the top, there's a status bar with 'iPad', signal strength, '3:57 PM', and '75%' battery. Below is a header with a logo and the title 'New Transfer'. The main form has four fields: 'From Whs', 'To Whs', 'Set Whs', and 'Comments'. A box labeled '2' points to the 'Set Whs' field, and another box labeled 'Select your Warehouses' is positioned over the 'Set Whs' field. Below the form is a table with columns: 'Item', 'From Whs', 'To Whs', 'Open Qty', and 'Actual Qty'. A button labeled '3' points to 'Add New Item', and a box labeled 'Add your Items' is positioned over the table. At the bottom is a large 'Submit' button.

4. Once the warehouses and items have been added to the New Transfer, tap anywhere on the item row to see which batches* and their quantities are available in the From Whs.



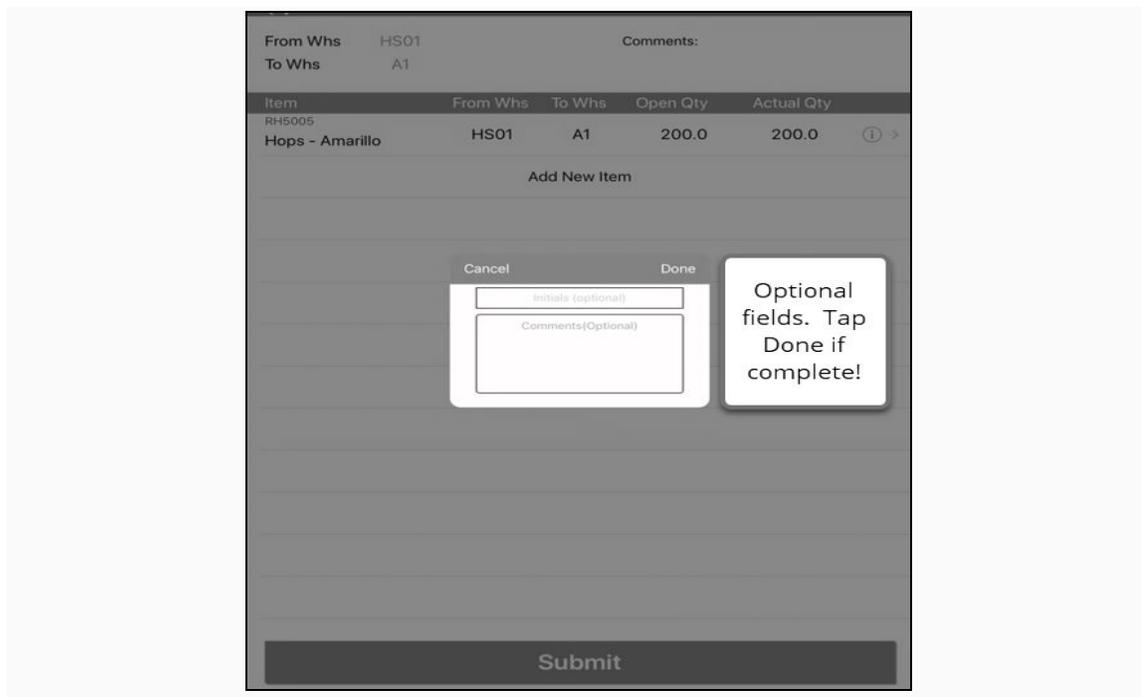
5. Tap the Set Qty box on the right to activate the calculator in order to add in the Actual Qty that was transferred



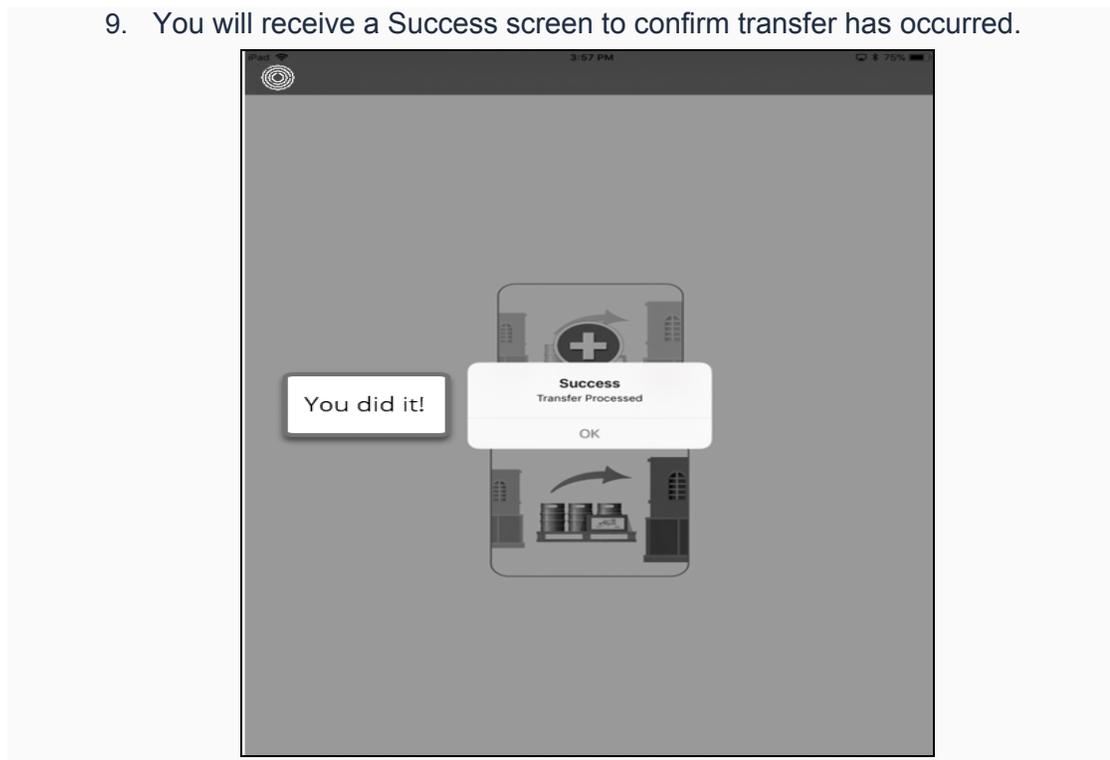
6. If you need to add more items to this transfer, tap Add New Item again and follow steps 1-5.
7. When the transfer information is complete, tap Submit.



8. Feel free to add *optional* initials and comments related to this transfer, then tap 'Done'



9. You will receive a Success screen to confirm transfer has occurred.

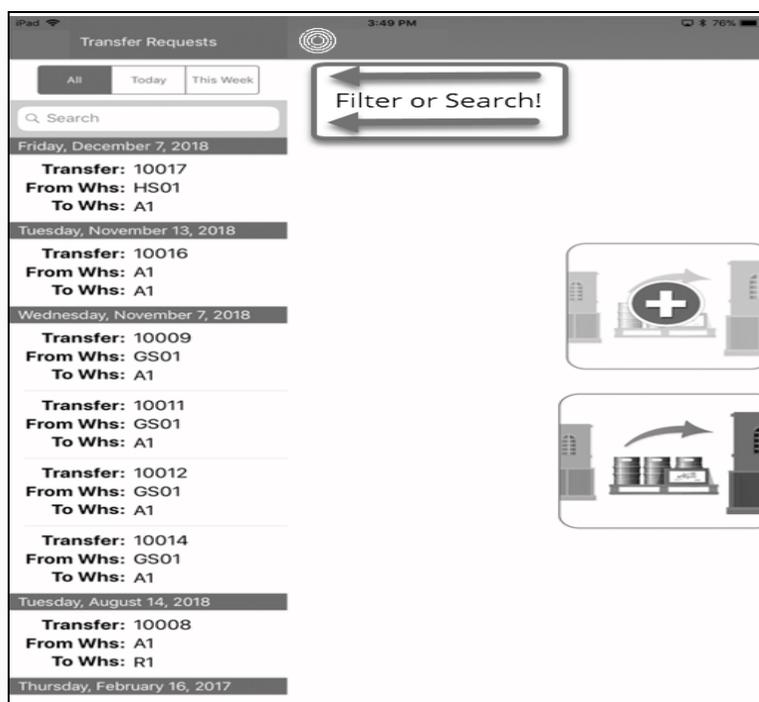




Process existing Transfer Request

This option allows the user to edit and process an Inventory Transfer Request that was previously created through Orchestrated. Once processed, the Transfer Request turns into an official Transfer, which is sent back into Orchestrated immediately upon submission. This functionality works great right if your business process flow utilizes requests first, then approval later. Or if you'd like to queue up a transfer to occur at a later point in time, lean on this Inventory App to process the transfer in real time!

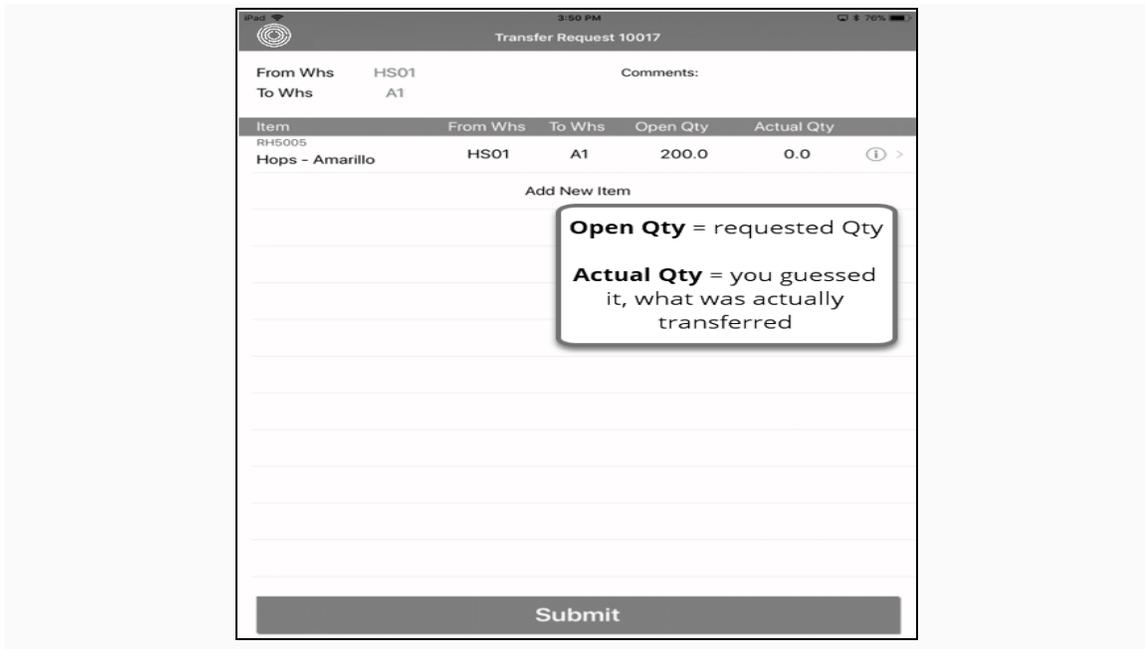
1. The user is shown a list of all Transfer Requests on the left hand side of the screen. The list can be filtered by tapping **All** | **Today** | **This Week** or utilizing the Search bar to search warehouses. Note: This list will only display open documents. If a transfer has been closed/completed, it will not show.



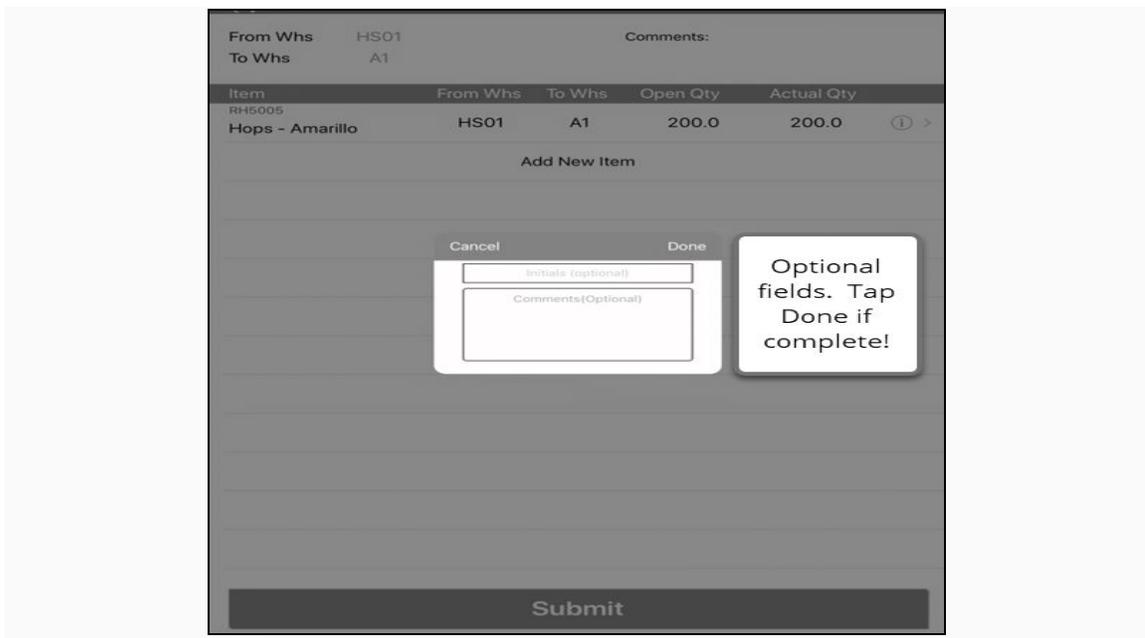
2. Get started by tapping the Transfer Request which needs to be completed in Orchestrated.
3. To change/edit warehouses, tap the From or To Whs to reveal a scroll wheel of the warehouses in your database. Scroll then tap to select the warehouse inventory is being transferred from and then perform the same steps to select which warehouse that inventory has been moved to.



4. The item row shows details from the Transfer Request. Tap anywhere on the item row to see which batches* and their quantities are available in the From Whs.



5. Tap the Set Qty box on the right to activate the calculator in order to add in the Actual Qty that was transferred.





6. If you need to add more items to this transfer, tap Add New Item.
7. The user can search for items by their Item Name, Item Code, or Item Group and tap to add each item one at a time. Items must be in stock in order to be selected for a new transfer.
8. When the transfer information is complete, tap Submit.
9. Feel free to add *optional* initials and comments related to this transfer, then tap Done.

Transfer Request 10017

From Whs HS01 Comments:

To Whs A1

Item	From Whs	To Whs	Open Qty	Actual Qty
RH5005 Hops - Amarillo	HS01	A1	200.0	200.0

Add New Item

Cancel Done

Initials (optional)

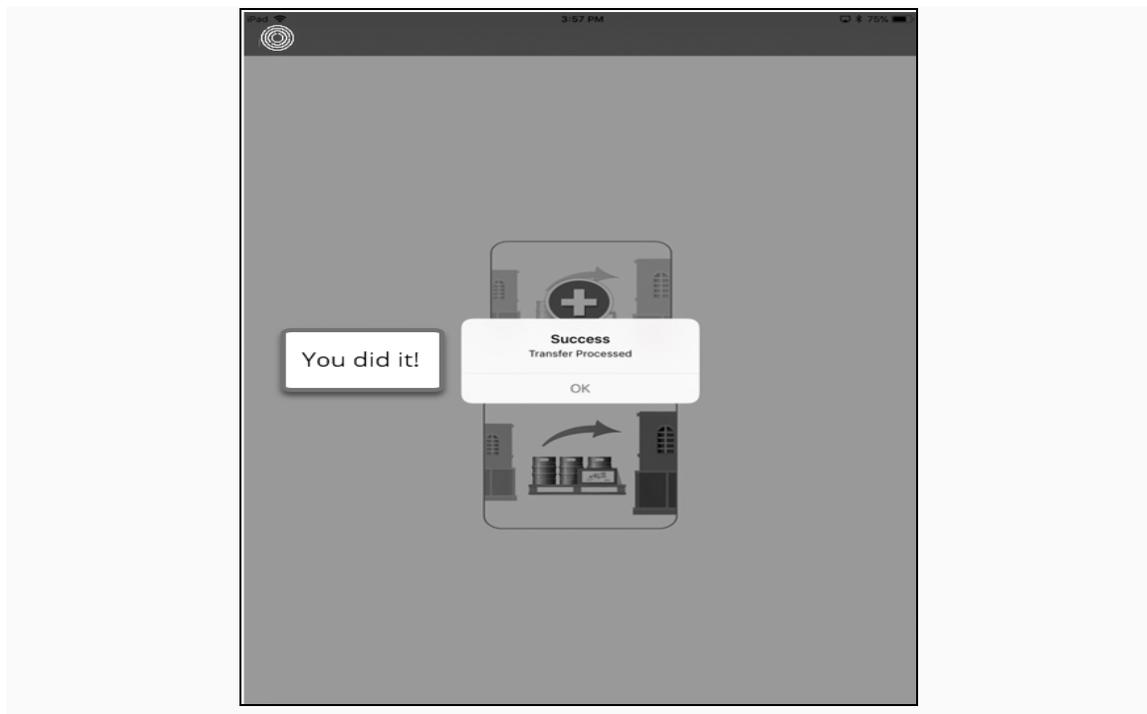
Comments(Optional)

Optional fields. Tap Done if complete!

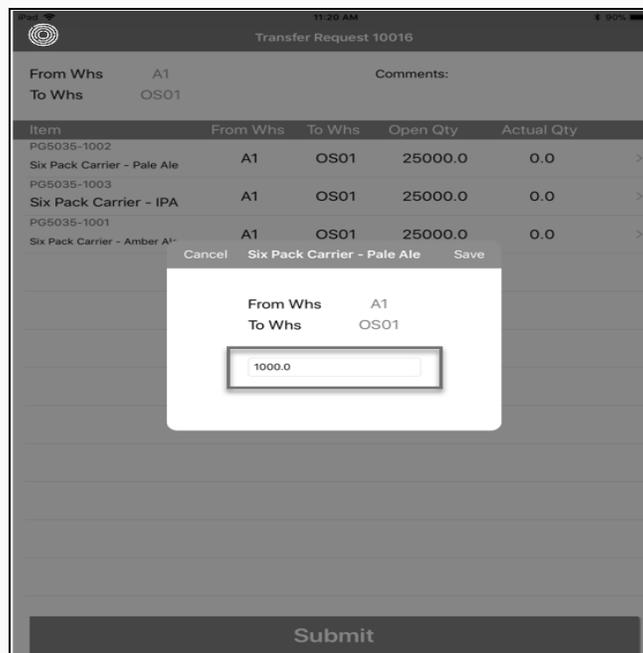
Submit



10. You will receive a Success screen to confirm transfer has occurred.



*If you are transferring non-batch managed items (packaging, etc.), tap anywhere on the item row to add in the quantity of non-batch managed items being transferred.





FAQs:

Q: Can you create new Transfer Requests directly from the app?

A: Not at this time. Transfer Requests have to be created first within the desktop version of Orchestrated.

Q: If I pre-select batches for an Inventory Transfer Request from the desktop, will those populate when viewed from the app?

A: We do not support pre-selected batches at this time, as they will not appear from the app. You must select batches from the app when you are processing the Transfer Request.

For additional features within the iPad Inventory app, check it out!

[Orchestrated iPad Inventory App Features](#)