# OVERVIEW OF WAREHOUSE FUNCTION

The Warehouse function allows accounts to efficiently process inventory from a main Warehouse to a Satellite location associated within the account.

1. **Processing Restock Orders at a Satellite Location**
2. **Processing Restock Orders at the Warehouse Location**
3. **Checking in a Warehouse Order at a Satellite Location**
4. **Managing Short Shipments at Warehouse Location**
5. **Ordering Direct from a Vendor at a Satellite Location**

1. Processing Restock Orders at a Satellite Location:

A Satellite Location can place an order to the Warehouse by selecting the Restock button on the Inventory Location page.
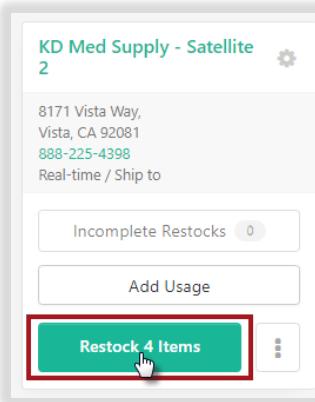
A list of the products to be ordered will display. The quantity available in the Warehouse is visible and the order quantity may be adjusted if needed. After the order has been reviewed, the restock is generated by selecting the "Create 1 Restock" button.

Once the order is placed an Awaiting Delivery message is displayed indicating the order is now pending at the Warehouse.

Note: Restocks can be cancelled by the Satellite or Warehouse location up until the time they are Pulled by a User in the Warehouse.

2. **Processing Restock Orders at the Warehouse Location:**

The Warehouse Inventory location will display a Satellite Restocks button in addition to the Incomplete Restocks button currently associated with the Warehouse orders. To process orders received from Satellite select Satellite Restocks to display all pending Satellite orders.
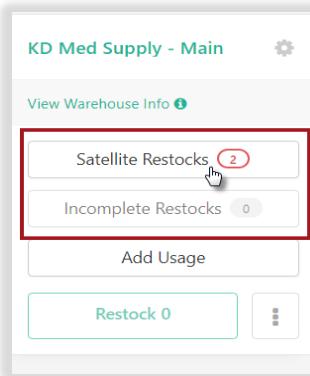
A. The first step at the Warehouse to process a Satellite order is **Pull**.
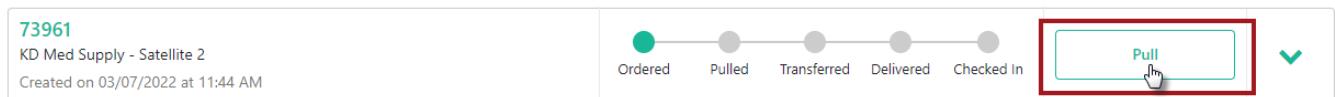
Once Pull is selected, the Warehouse is able to preview the requested product and quantities for each order. Select the Set to Requested to auto-populate all requested quantities or manually adjusted quantities requested.
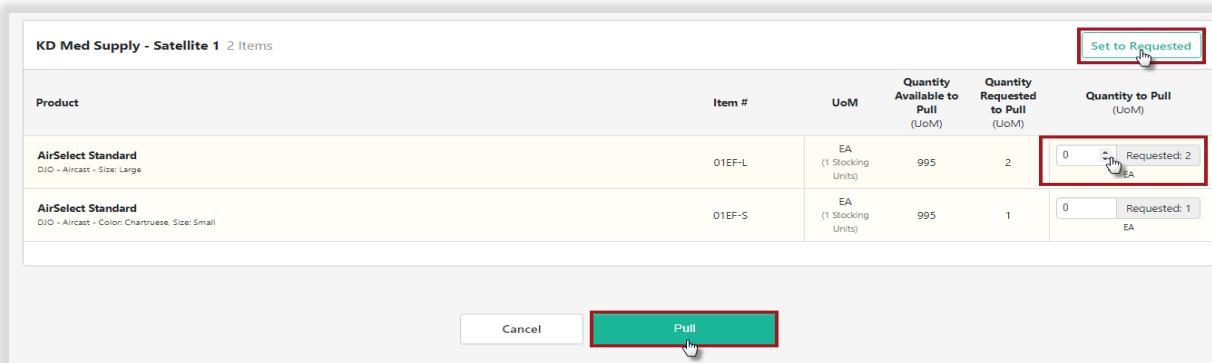
B. The second step at the Warehouse to process a Satellite is **Transfer**. Once the product is pulled and packed the Warehouse selects Transfer to decrement inventory from the Warehouse.

C. The Final step at the Warehouse to process a Satellite order is **Deliver.**

3. Checking in a Warehouse Order at a Satellite Location

After the order has been processed and delivered, the order will remain under the Satellite tab in the Warehouse location until the Satellite location completes the **Check-In.**

For the Satellite location, click **Check In** to view all products on the order. If all quantities and products were shipped and received, select Set All to Max and Check In. If a partial shipment was received each product can be manually adjusted to the quantity received and Check In. The order will remain open until all items have been Checked In.

4. Managing Short Shipments at Warehouse Location

If the Warehouse is unable to fufill the quantity requested from the Satellite location, the Warehouse can adjust the Quantity to the amount available. These quantity adjustments are completed when the restock is Pulled.

Select Satellite **Restocks button** from the Warehouse location.
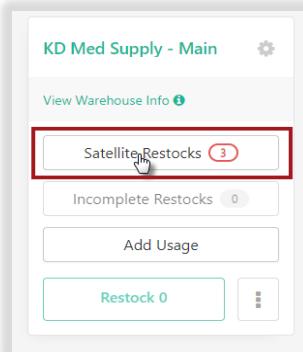
Select the **Pull** button on the PO# for the Satellite location.
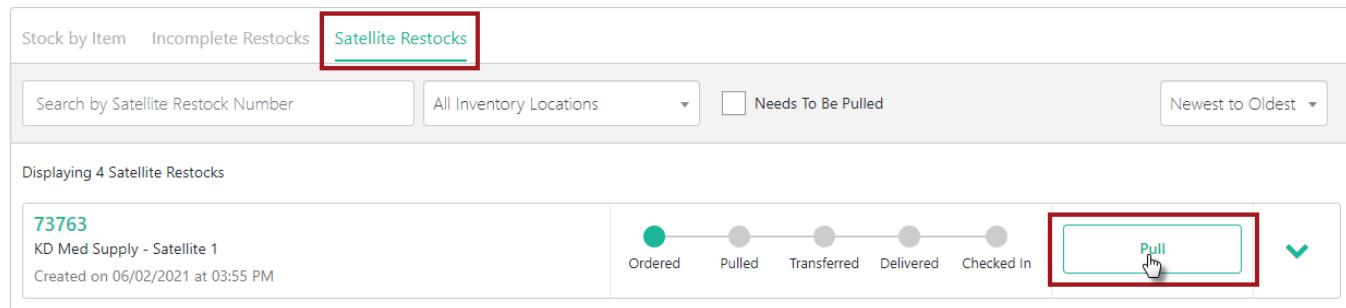
The Warehouse User can view the quantity available to pull from the Wearhouse. If the quantity requested is greater than the quantity available, an error message will show.
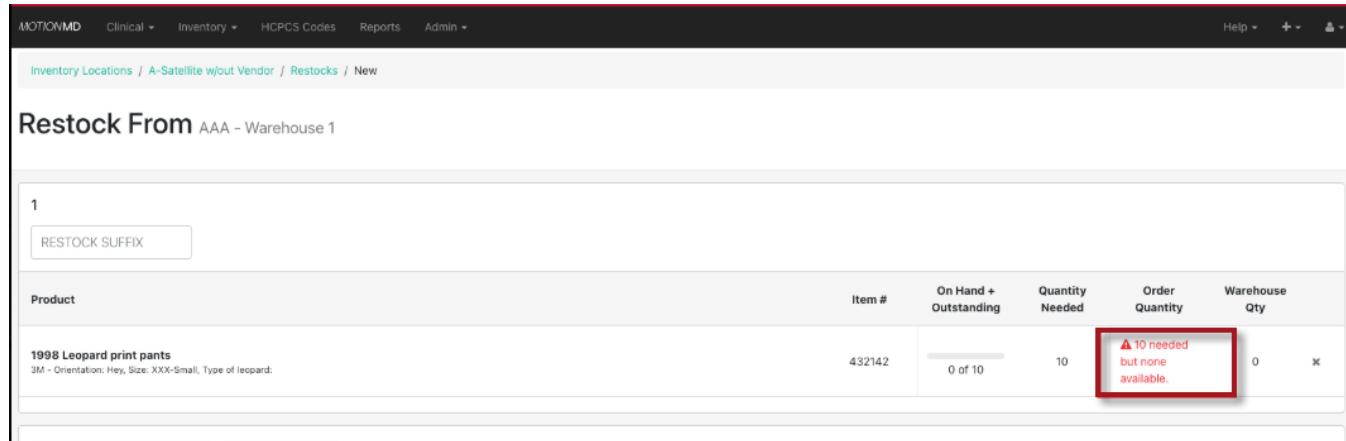
The User can manually adjust the quantity prior to processing and pulling the order.

After decreasing any stock quantities to be shipped by the Warehouse when it's Pulled, the PO is then processed through the remaining steps of Transfer and Deliver. Upon Check-In of the order at the Satellite location, the quantity received will automatically reflect the adjustment made by the Warehouse.

In the example below, the Warehouse only shipped 2 of the 5 requested. The User at the Satellite location will only see quantity 2 to Check In on the PO.

The remaining quantity of 3 will then appear in the Pending Restocks to be ordered once the next PO is generated for the Satellite location

5. Ordering Direct from a Vendor at a Satellite Location

When the Warehouse is out of stock or low on stock for an item, a Satellite location can be set up with the option to place an order directly with a vendor.

Generate the restocks for the items pending at the Satellite location. To the left of each SKU listed, Users will have the option to select the Convert to Vendor Order button for each product as needed. Once complete, select Create Restock to place the order direct to the vendor.