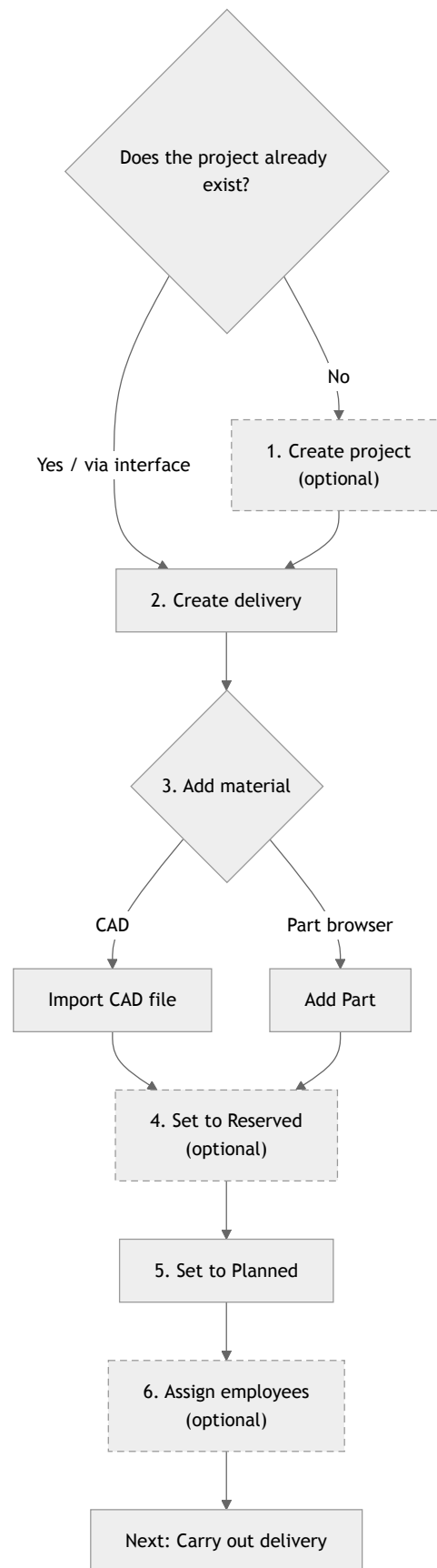


Create delivery

Process chart

This process describes how to create and prepare a delivery for a project.



Optional steps are shown with dashed outlines in the chart.

Create delivery

Process steps

1. Create project (optional)

Open Projects in the web app and create a new project. The detail view opens immediately. Enter the required master data and select the appropriate project status. Changes in the Details tab are saved automatically when you leave the relevant field.

2. Create delivery

Open the relevant project and switch to the Deliveries tab. Click the plus button to create a new delivery. The user's default location is already entered as the start, and the open project is entered as the destination.

3. Add material

After creating the delivery, add the required material. There are two options: import a CAD file or select parts manually using the part browser.

4. Set delivery to Reserved (optional)

This step is particularly important for companies where the person creating deliveries does not also organize the warehouse. Set the delivery to Reserved to release it for picking without sending it to the warehouse yet.

5. Set delivery to Planned

Set the delivery to Planned once the list is complete and ready for the warehouse.

6. Assign employees (optional)

Open the created Warehouse Task for picking and select a Warehouse worker. This makes it clear who is responsible for preparing the material.