Transfers Overview and Topics

Last Modified on 01/11/2023 10:55 am EST

There are two methods available to transfer inventory parts from one warehouse to another.

- Transfer Requests and
- Single Part Transfers from a Part Explorer

Transfer Requests

The Transfer Requests feature was designed primarily for transferring parts from one branch warehouse to another, and providing tracking dates as to when the parts were shipped and when the destination warehouse actually received the parts.

Transfer Requests are also used to move parts from one warehouse to another within the same branch; i.e.: replenishing stock in Technician Warehouses.

When selecting the Transfers option from the Inventory menu, the Transfer Requests list will be displayed. Any transfers that have not been completely received will be listed. From the Transfer Requests list, a new Transfer Request may be created, and existing Transfer Requests may be received or modified prior to receiving. Closed Transfer Requests may be opened and viewed by clicking on the Include Closed button.

A Transfer Request may be initiated from two areas of the application:

The Main Application Menu Inventory / Transfer option - used for transferring one or multiple part numbers to another warehouse in a single transaction.

A Warehouse Explorer Record - used for transferring one or multiple part numbers to another warehouse in a single transaction.

Prior to using the Transfer Requests functionality, make certain to completely read the topic Transfer Requests Overview.

Single Part Transfers may only be performed from a Part Explorer record. Only one part number may be transfered during a transaction.

Follow the topic links below for instructions related to Part Transfers.

Create a Single Part Transfer from a Part Explorer

Transfer Requests Overview

Create a Transfer Request from the Inventory Module

Create a Transfer Request from a Warehouse Explorer