Transfer Requests Overview and Topics

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Before using Transfer Requests, it is important to understand the designed functionality of the feature. Please read all entire article prior to creating your first Transfer Request.

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 physically shipped and when the destination warehouse actually received the parts.

Fields are available on the Transfer Request form to indicate whether the part(s) is for a Job or Ticket and the corresponding Job or Ticket Number. Linking a Transfer Request to a Job or Ticket has no impact on the Job or Ticket; it is simply for reference purposes so that the receiving warehouse will know if the parts are intended for a particular use.

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

Inter-branch Transfer Requests are initiated by the source warehouse and received/completed by the destination warehouse. While parts are in transit, when viewing a Part Explorer or Warehouse Explorer, you are able to see how many parts are pending a transfer. Until the Transfer Request is received, the parts remain as part of the inventory of the source warehouse.

The Transfer Request contains a feature that allows you to created and receive immediately.

Note: If the cost in the sending Warehouse is different than the cost in the receiving warehouse, the variance will automatically be posted to the Purchase Price Variance Account (PPV).

Below are process flow charts and definitions of the Transfer Request process.

Below is an example process flow for parts being shipped from one Branch Warehouse to another.

Below is an example process flow for parts being moved from one Warehouse to another within the same branch.

When clicking on the Transfers option within the Inventory module, the Transfer Requests (list) will be displayed. Any Transfer Requests that have not been received will be listed.

At the bottom of the form are four function buttons:

- Include Closed - Clicking on this button will refresh the list with all open and closed Transfer Requests. If the State column is automatically marked as Closed when a Transfer Request is received.
- Receive - Highlighting an open Transfer Request within the list then clicking on the Receive button will open the Receive Transfer Request form.
- New - Clicking on the New button will open a blank Transfer Request form to begin a new request.
- Close - Clicking on the Close button will close the Transfer Requests (list).

Warehouse Selection
Required Fields are denoted by an asterisk (*)

- From Warehouse* - This is the source warehouse from which parts are being transferred out (drop-down list selection)
- To Warehouse* - This is the destination warehouse to which parts are being transferred in (drop-down list selection)
- Memo - Used for entering an informational note. This field will accommodate up to 255 characters, however only the first 25 characters are viewable without scrolling to the right.
- Requested Date - This is the date on which the Transfer is being requested. Today's date will auto-fill into this field.
- In Process Date - The date on which the source warehouse staff began pulling the parts to be transfered.
- Shipped Date - The date the parts actually shipped to the destination warehouse.
- For Job/Ticket - If the parts are to be used for a specific Job or Ticket, make the appropriate selection from the drop-down list; otherwise this should be left as None.
- Reference - If Job or Ticket was selected in the previous field, select the Job or Ticket number for which the parts are intended. This is for informational purposes only and will not appear or have any affect on the Job or Ticket selected.
- Radio Buttons:
    - Bring to Quantity Up to Minimum
    - Bring Quantity Up to Maximum
    - Manual Transfer: Selected when you want to manually select which parts to transfer

  If Minimum and Maximum stock levels have been setup for any parts in the To Warehouse (destination), if selecting either the Bring to Minimum or Maximum option, the software will evaluate the on-hand inventory in the To Warehouse; the list of Parts to Transfer will auto-fill with the Parts Numbers and Quantities needed to bring the stock levels up to the Minimum or Maximum levels.

After information has been entered into the Warehouse selection area, if performing a Manual Transfer (not using the Min/Max options), Parts and Quantities to transfer are selected one at a time. When the Update button is clicked, the

Part will move over to the Parts to Transfer List on the right of the form. The Parts to Transfer List will display:

- Source Qty - This is the current on-hand quantity available in the "From" Warehouse
- Dest Qty - This is the current on-hand quantity available in the "To" Warehouse
- Req Qty - This is the requested transfer quantity entered

If the transfer is to be completed immediately, you would click the Save/Receive button to complete the transfer request. This method is typically used when replenishing truck stock.

If this is and Inter-Branch transfer and parts are physically being shipped to another warehouse location, then the user would click the Save button. The transfer request will appear in the Transfer Requests list until the "To" Warehouse has confirmed receipt of the parts and will then receive the Transfer Request.

Receiving a Transfer Request
When clicking on the Save/Receive button on a Transfer Request form or by highlighting a saved Transfer Request from the Transfer Requests list and clicking the Receive button, the same Receive Transfer Request form will be displayed. The user simply clicks on the Save button to accept the parts into their inventory and close the Transfer Request.

Click on the links below for instructions on creating a Transfer Request.

Create a Transfer Request from the Inventory Module

Create a Transfer Request from a Warehouse Explorer