Create a Transfer Request from the Inventory Module

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To create a Transfer Request from the Inventory Module, follow the instructions below.

1. To begin a new Transfer Request, navigate to the main application menu, select the Inventory module, then click on the Transfers option within the Inventory menu tree.

2. The Transfer Requests (list) will be displayed. Click on the New button located at the bottom of the list.

3. The Transfer Request form will be displayed. See below for data entry field definitions.

Data Entry Fields

4. In the Warehouse Selection area, make choices from drop-down list fields and enter the appropriate information for the transfer.

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 into which parts are being transferred (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. If this transfer is for the purpose of transferring to a Technician's Warehouse or some other internal company warehouse, you may skip this field.
- 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 (select one):
  - 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 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.

5. In the Part Selection area:

- Part Code - either type in or click on the lookup button to the right of the field to locate the part to transfer.
- Transfer Quantity - type in the quantity to be transferred out of the "From" Warehouse.
- Serial Number - If the Part Number selected is setup to use Serial Number Costing, you must select a Serial Number from the list. This field will be dimmed out if the part is not being tracked by serial number.

Click the Update button once the above information has been entered.
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.
Continue with the same steps until all parts needing to be transferred have been selected.

Saving the Transfer Request

- If you want to complete this transfer immediately, click on the Save/Receive button located at the bottom of the form, then continue on to the next page of this help topic.
- If this transfer request is for the purpose of physically shipping parts to another warehouse location, click the Save button located at the bottom of the form, then advance to the header topic "Receive a Transfer Request from the Transfer Requests List" later in this article.

6. When selecting the Save/Receive button on the Transfer Request form, a confirmation message will be displayed asking if you are ready to save the transfer request. Click on the Yes button to proceed.

7. The Receive Transfer Request form will be displayed. Simply click on the Save button located at the bottom of the form. Another confirmation message will be displayed confirming you want to Receive the Transfer Request; click the Yes button to proceed.
The Receive Transfer Request form will close and you will be returned to the Transfer Requests list.

Receive a Transfer Request from the Transfer Requests List
Open the Transfer Requests List (Inventory Module / Transfers tree option).

Highlight the Transfer Request to be received, then click on the Receive button at the bottom of the form.

The Receive Transfer Request form will be displayed. Simply click on the Save button located at the bottom of the form. A confirmation message will be displayed confirming you want to Receive the Transfer Request; click the Yes button to proceed.

The Receive Transfer Request form will close and you will be returned to the Transfer Requests list.