

How to Transfer Inventory Between Warehouses

Last Modified on 09/13/2024 6:52 pm EDT

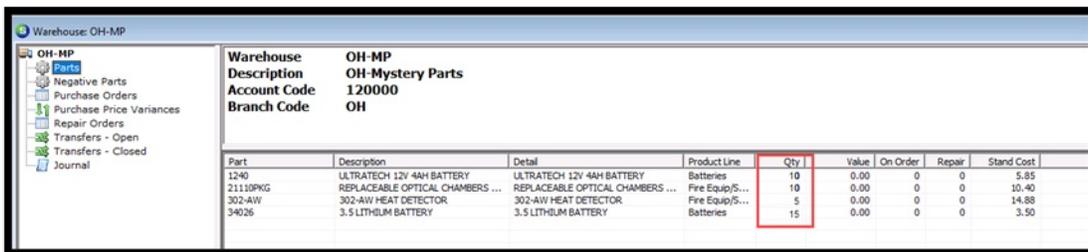
The Transfer Request contains a feature that allows you to create and receive immediately all or part of that warehouse's inventory. These steps are done in SedonaOffice version 6.2.0.16.

Overview

Prior to using this quick guide, it is recommended to read the Transfer Requests Overview by clicking [here](#). This document also assumes the user will have the proper permissions to perform the steps needed.

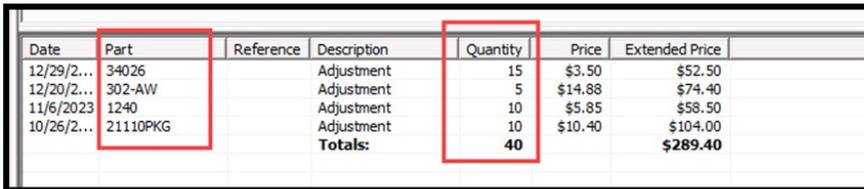
Steps:

1. Open the warehouse that will be transferring the inventory out – Click on Parts to get the list of parts to use for the transfer



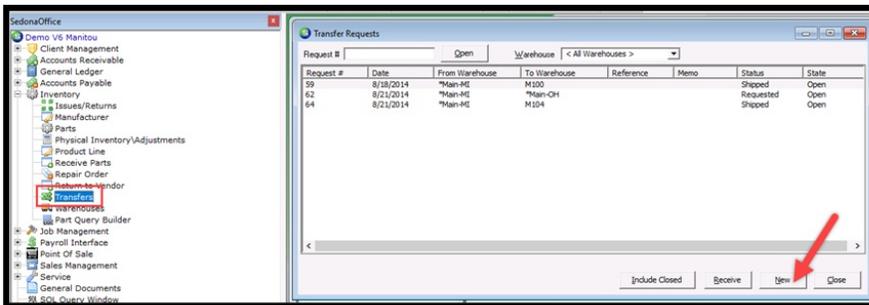
Part	Description	Detail	Product Line	Qty	Value	On Order	Repair	Stand Cost
1240	ULTRATECH 12V 4AH BATTERY	ULTRATECH 12V 4AH BATTERY	Batteries	10	0.00	0	0	5.85
21110PKG	REPLACEABLE OPTICAL CHAMBERS ...	REPLACEABLE OPTICAL CHAMBERS ...	Fire Equip/S...	10	0.00	0	0	10.40
302-AW	302-AW HEAT DETECTOR	302-AW HEAT DETECTOR	Fire Equip/S...	5	0.00	0	0	14.88
34026	3.5 LITHIUM BATTERY	3.5 LITHIUM BATTERY	Batteries	15	0.00	0	0	3.50

2. Click on the Journal to see the statuses prior to transferring the parts

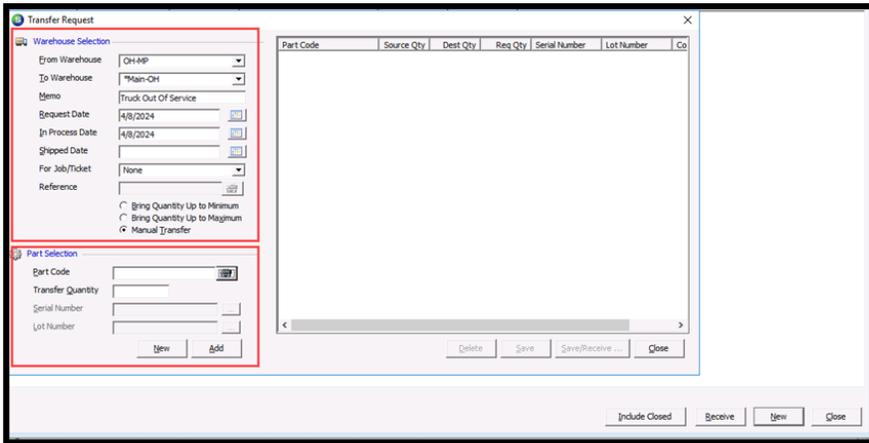


Date	Part	Reference	Description	Quantity	Price	Extended Price
12/29/2...	34026		Adjustment	15	\$3.50	\$52.50
12/20/2...	302-AW		Adjustment	5	\$14.88	\$74.40
11/6/2023	1240		Adjustment	10	\$5.85	\$58.50
10/26/2...	21110PKG		Adjustment	10	\$10.40	\$104.00
Totals:				40		\$289.40

3. In SedonaOffice Tree - Click on Transfers under the Inventory – Click on New



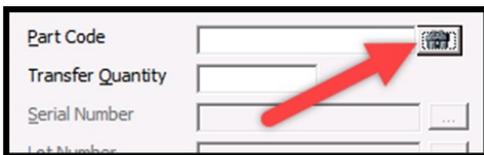
4. When the Transfer Request opens – Fill in the Warehouse Selection and the Part Selection



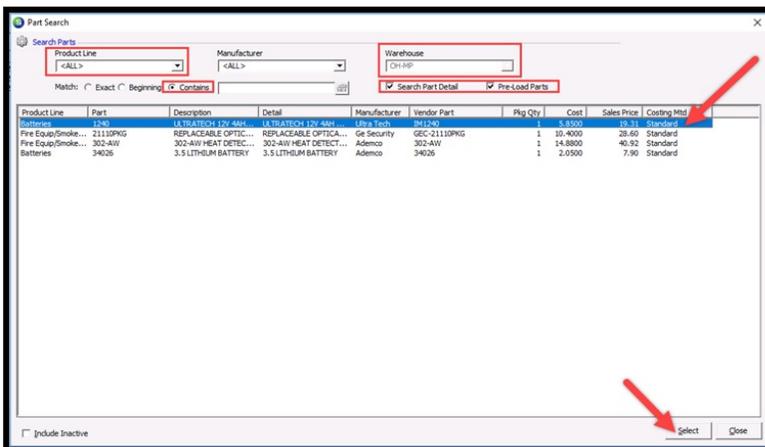
5. The Part Selection can be used in 2 ways:

By clicking on the Lookup Button

1) Click on Lookup Button

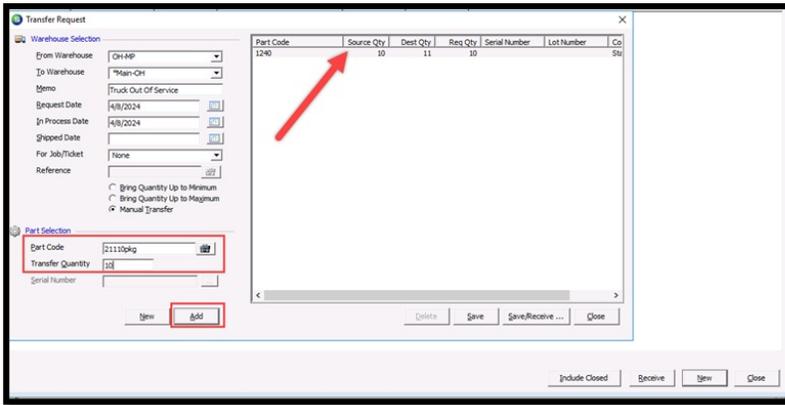


2) Change the Product Line to <ALL> so all of the parts for that warehouse only will show in the list



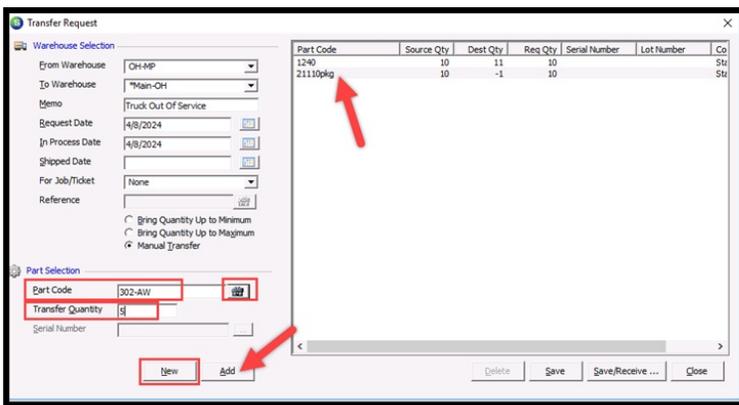
3) Highlight one at a time each part to be transferred – Click on Select when done

4) Add the Transfer Quantity – Then click on Add button to add to the Part list to the right

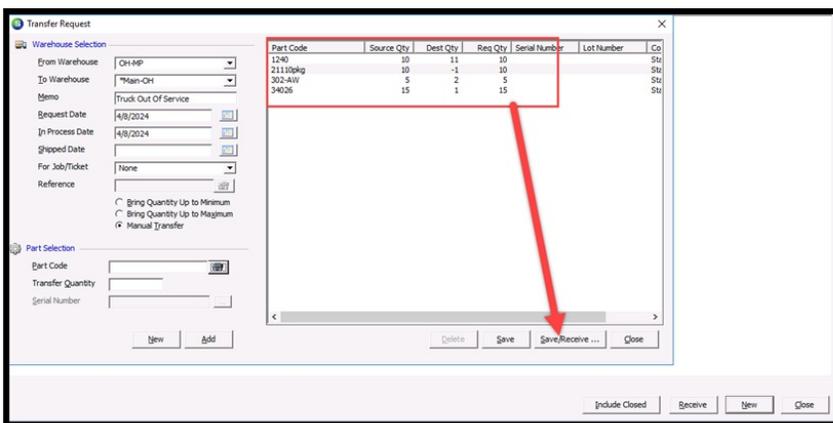


By Manually typing in the Part Code

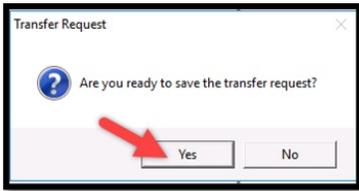
- 1) Click on the New button under Part Selection
- 2) Then manually fill in the Part Code – Click on the Lookup button to verify correct – Fill in the Quantity to transfer – Click Add



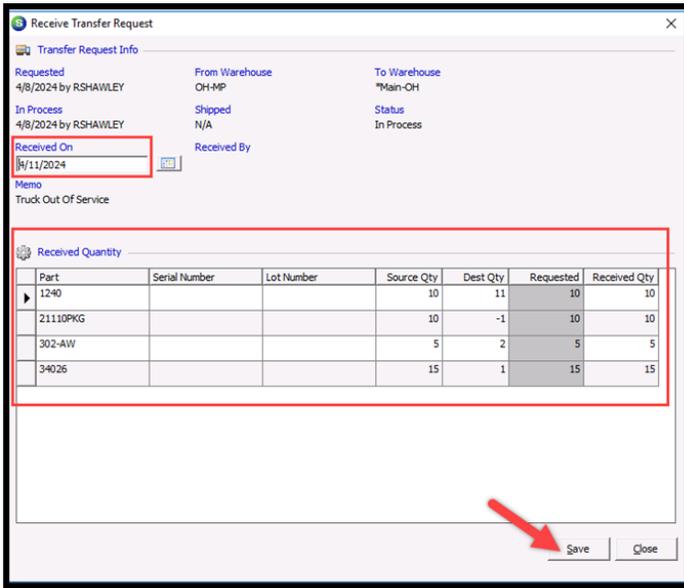
6. Once all parts are added from Step 5 – Click on Save/Receive... button



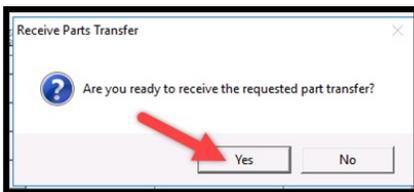
7. Click Yes once asked if ready to save



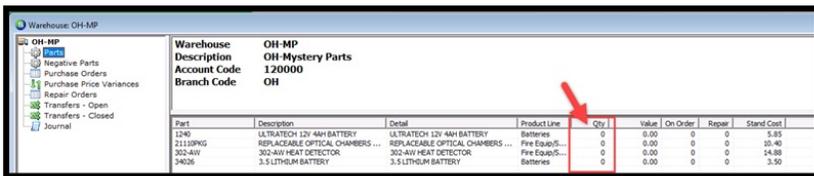
8. The Receive Transfer Request Form will open – Fill in the Received On date and verify data – Click on Save button when ready



9. Click on Yes when asked if ready to receive transfer



10. Once the complete will go back to the warehouse page – Click on Parts to see if any quantities remain



11. Can also click on Journal to see the transfers of all the parts that were completed

Warehouse: OH-MP

OH-MP
 Description OH-Mystery Parts
 Account Code 120000
 Branch Code OH

Date	Part	Reference	Description	Quantity	Price	Extended Price
4/11/2024	34026		Transfer	-15	\$3.50	(\$52.50)
4/11/2024	302-AW		Transfer	-5	\$14.88	(\$74.40)
4/11/2024	21110PKG		Transfer	-10	\$10.40	(\$104.00)
4/11/2024	1240		Transfer	-10	\$5.85	(\$58.50)
12/29/2...	34026		Adjustment	15	\$3.50	\$52.50
12/20/2...	302-AW		Adjustment	5	\$14.88	\$74.40
11/6/2023	1240		Adjustment	10	\$5.85	\$58.50
10/26/2...	21110PKG		Adjustment	10	\$10.40	\$104.00
Totals:				0		\$0.00

12. The receiving warehouse can also be verified by opening that journal

Warehouse: *Main-OH

*Main-OH
 Description Main-Ohio
 Account Code 120000
 Branch Code OH

Date	Part	Reference	Description	Quantity	Price	Extended Price
4/15/2024	12	3513	Service	-5	\$5.00	(\$25.00)
4/11/2024	34026		Transfer	15	\$3.50	\$52.50
4/11/2024	302-AW		Transfer	5	\$14.88	\$74.40
4/11/2024	21110PKG		Transfer	10	\$10.40	\$104.00
4/11/2024	1240		Transfer	10	\$5.85	\$58.50
3/20/2024	SYSPC2W	807	Job	-5	\$33.60	(\$168.00)
3/20/2024	CP6954RF	807	Job	-5	\$42.40	(\$212.00)