How to Transfer Inventory Between Warehouses

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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

Warehouse: OH-MP									
OH-HP Sets Parts Purchase Orders Purchase Price Variances Purchase Price Variances Transfers - Open	Warehouse Description Account Code Branch Code	OH-MP OH-Mystery Parts 120000 OH							
lournal	Part	Description	Detail	Product Line	Qty	Value	On Order	Repair	Stand Cost
E Souther	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 LITHOUM 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

1		-					
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

SedonaOffice		Transfer Pa							
Demo V6 Manitou		ITalister Ne	luer						
Client Management	Re	quest #		Qpen	Warehouse < All W	arehouses >	*		
Accounts Receivable			1	1	1	Le 4	1	1.0.1	1
General Ledger	Re	equest #	Date	From Warehouse	To Warehouse	Reference	Memo	Status	State
Accounts Payable	59		8/18/2014	"Main-ML	M100			Shipped	Open
a sy inventory	64		8/21/2014	Main-MI	MI04			Chipped	Open
a Issues/ Recurns			Olevieora	1-100 FT-10	11101			an appress	open
Manuracturer									
agrants									
Physical Inventory vajustments									
Product Line									
La Receive Parts									
Repair Order									
- 3 Transfers									
www.arenouses									
Part Query Builder									
P Job Management									
- S Payroll Interface		-							
Point Of Sale									
🛞 🛄 Sales Management									
🖲 🥜 Service						Include C	Insed R	eceive New	Close
General Documents						- Proster o			200
- \$1 SOL Overy Window									

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

1	ransfer Request								×	
	Warehouse Selection		-	Part Code	Source Qty	Dest Qty	Reg Qty Serial Numb	er Lot Number	Co	
	Erom Warehouse	OH-MP 💌								
	To Warehouse	*Main-OH 💌								
	Memo	Truck Out Of Service								
	Request Date	4/8/2024								
	In Process Date	4/8/2024								
	Shipped Date									
	For Job/Ticket	None								
	Reference									
		C gring Quantity Up to Minimum								
		 Bring Quantity Up to Maximum Manual Transfer 								
F8 p	art Selection									
ø .	Part Code	1000								
	Transfer Quantity									
	Serial Number									
	Lot Number			٢					>	
		New Add				Delete	Save Save	(Receive d	ose	
						20000				
			_							
								Include Ck	osed	Receive New Close

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

By clicking on the Lookup Button

1) Click on Lookup Button

Part Code	
Transfer Quantity	
Serial Number	
Lot Number	

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

Part S	Search												×
53 can	ch Parts												
-	Product L	ne		Manufactur	er	Ware	house						
	<all></all>		*	<all></all>	•	OH	MP						
	Match: (° Exact ⊂ Beginni	ing (🖲 Contair	8	đ	⊽ s	earch Part Detail	Pre-Loa	d Parts				
Product	tLine	Part	Descripti	on	Detail	Manufacturer	Vendor Part	Pkg	Oty	Cost	Sales Price	Costing Mtd	
Batterie	5	1240	ULTRATE	CH 12V 4AH	ULTRATECH 12V 4AH	Ultra Tech	IM1240		1	5.8500	19.31	Standard	
Fire Eq. Fire Eq. Batterie	ip/Smoke ip/Smoke s	21110PKG 302-AW 34025	REPLACE 302-AW 3.5 LITH	IABLE OPTIC HEAT DETEC JUM BATTERY	REPLACEABLE OPTICA 302-AW HEAT DETECT 3.5 LITHOUM BATTERY	Ge Security Ademco Ademco	GEC-21109KG 302-AW 34026		1 1	10.4000 14.8800 2.0500	28.60 40.92 7.90	Standard Standard Standard	
	ude Inactive		_	_		_		_			•	Select	Qose

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

In the enduce become	1		Part Code	Source Oty	Dest Oty	Reg Oty	Serial Number	Lot Number	Co	
Erom Warehouse	OH-MP	•	1240	10	11	10		1.0000	Stz	
To Warehouse	"Main-OH	-	1.1							
Memo	Truck Out Of Service									
Request Date	4/8/2024									
In Process Date	4/8/2024									
Shipped Date										
For Job/Ticket	None	•								
Reference										
	Bring Quantity Up to Mi Bring Quantity Up to Ma Manual Transfer	inimum agimum								
Part Selection	C Bring Quantity Up to Mi Bring Quantity Up to Ma Manual Transfer	inimum axjimum								
Part Selection Part Code	C Bring Quantity Up to Mi C Bring Quantity Up to Mi C Manual Transfer	inimum agémum								
Part Selection Part Code Transfer Quantity	C Bring Quantity Up to M C Bring Quantity Up to M C Manual Transfer	inimum aximum								
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Part Selection Part Code Transfer Quantity Serial Number	C Bring Quantity Up to M C Bring Quantity Up to M C Manual Transfer	inimum agimum	<						>	
Part Selection Part Code Transfer Quantity Serial Number	C Bring Quantity Ub to M C Bring Quantity Up to M G Manual Transfer 21110pkg 10	inimum agimum	<		Delete	Save	Save/Rec	ceive D	> ose	
Part Selection Part Code Transfer Quantity Serial Number	C Bring Quantity Up to M C Bring Quantity Up to M C Manual Transfer	inimum agimum	¢		Delete	Save	Save/Res	zeive D	> 056	
Part Selection Part Code Transfer Quantity Serial Number	C Bing Quantity Up to M C Bing Quantity Up to M C Manual Transfer	inimum agimum	<.		Delete	Save	Save/Rec	ceive D	> ose	

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

Warehouse Selection	1		Part Code	Source Qty	Dest Qty	Reg Qty	Serial Number	Lot Number	C
From Warehouse	OH-MP	•	1240	10	11	10			St
To Warehouse	*Main-OH	•	21110ркд	10	-1	10			5
Memo	Truck Out Of Service		- T						
Request Date	4/8/2024								
In Process Date	4/8/2024								
Shipped Date									
For Job/Ticket	None	•							
Reference		100							
Part Selection	Bring Quantity Up to Bring Quantity Up to Manual <u>T</u> ransfer	Minimum Ma <u>x</u> imum							
Part Code	302-AW								
Transfer Quantity	s	_							
Serial Number									
			<						>
					1.000	1 .	1		

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

Transfer Request								×
Range Warehouse Selection		Part Code	Source Qty	Dest Qty	Reg Qty Ser	rial Number	Lot Number C	
Erom Warehouse	OH-MP •	1240 21110aka	10	11	10		S	itz
To Warehouse	*Main-OH 💌	302-AW	5	2	5		S	ste
Memo	Truck Out Of Service	34026	15	1	15		5	5tz
Request Date	4/8/2024							
In Process Date	4/8/2024				•			
Shipped Date					•			
For Job/Ticket	None							
Reference	<i>a</i>							
(3) Part Selection	gring Quantity Up to Minimum Gring Quantity Up to Magimum Manual Transfer							
Part Code Transfer Quantity Serial Number						1		
		<)	>
	New Add			Delete	Save	Save/Rei	ceive glose	
							Indude Closed	Beceive New Close

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

6	Receive Transfer Reque	ist						×
=	Transfer Request Info							
Reg 4/8/	uested 2024 by RSHAWLEY		From Wareh OH-MP	ouse	To Warehouse *Main-OH			
In P 4/8/	rocess 2024 by RSHAWLEY		Shipped N/A		Status In Process			
Rec [4/1	Received On 4/11/2024		Received By	,				
Men Truc	10 k Out Of Service							
- - 	Received Quantity	Carial M	mbar	Lot Number	Source Oby	Dect Oby	Requested	Received Oby
.	1240	Scholin	ander	Locitonidei	10	11	10	10
ŕ	21110PKG				10	-1	10	10
	302-AW	-			5	2	5	5
	34026				15	1	15	15
							Sav	e <u>G</u> lose

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

Watchouse OH-MP										
CH-HP Constant of the second	Warehouse Description Account Code Branch Code	OH-MP OH-Mystery Parts 120000 OH		•						
-as Transfers - Closed	Part	Description	Detai	Product Line	Qty	Value	On Order	Repair	Stand Cost	
2 Journal	1240	ULTRATECH 12V 4AH BATTERY	ULTRATECH 12V 4AH BATTERY	Batteries	0	0.00	0	0	5.85	
	21110PKG	REPLACEABLE OPTICAL CHAMBERS	REPLACEABLE OPTICAL CHAMBERS	Fire Equip/S	0	0.00	0	0	10.40	
	302-AW	302-AW HEAT DETECTOR	302-AW HEAT DETECTOR	Fire Equip/S	0	0.00	0	0	14.88	
	34026	3.5 LITHIUM BATTERY	3. SLITHIUM BATTERY	Batteries	0	0.00	0	0	3.50	

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

Warehouse: OH-MP OH-MP Parts Negative Parts Purchase Orders IP urchase Price Variances Repair Orders Transfers - Open	Wareho Descrip Accoun Branch	ouse otion t Code Code	OH-MP OH-Myste 120000 OH	ry Parts				
Transfers - Closed	Date	Part	Reference	Description	Quantity	Price	Extended Price	
E.J Educational	4/11/2024	34026		Transfer	-15	\$3.50	(\$52.50)	
1	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	-
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12. The receiving warehouse can also be verified by opening that journal

