



Inventory Transfers

Megan De Freitas - 2024-11-22 - Inventory

Overview

The Inventory Transfers function allows the user to transfer inventory from one warehouse location to another. This function will only create the transfer document and the actual movement will not occur until the transfer document is posted in GP.

Note: Editing inventory transfer transactions is not supported in SalesPad Desktop. They will be viewed as read-only when opened after creation in GP or SalesPad.

Security

Inventory Transfers must first be enabled in the Security Editor. Set the Misc sub-settings as needed (Refer to the SalesPad Security Settings document for more information). Save any changes and log out and back into SalesPad for security changes to take effect.

Usage

Modules > Inventory Transfers

| Item# | Item Description | Site | Bin | Qty Available | Action | Transfer Qty | Destination Site | Destination Bin |
|-----------|--------------------|-----------|------------|---------------|--------|--------------|------------------|-----------------|
| 100XLG | Green Phone 2 | WAREHOUSE | a | 1 | | 0 | | |
| 100XLG | Green Phone 2 | WAREHOUSE | E01S3 | ~302 | | 0 | | |
| 100XLG | Green Phone 2 | WAREHOUSE | 1 | 1 | | 0 | | |
| 100XLG | Green Phone 2 | WAREHOUSE | XX3 | 1 | | 0 | | |
| 100XLG | Green Phone 2 | WAREHOUSE | A4D7 | 1 | | 0 | | |
| 100XLG | Green Phone 2 | WAREHOUSE | A4F5 | 1 | | 0 | | |
| 100XLG | Green Phone 2 | WAREHOUSE | A12C23 | 2 | | 0 | | |
| 100XLG | Green Phone 2 | WAREHOUSE | Z0X8 | 1 | | 0 | | |
| 128 SDRAM | 128 meg SDRAM | NORTH | AUTOCREATE | ~51,341 | | 0 | | |
| 128 SDRAM | 128 meg SDRAM | NORTH | TEST | ~35 | | 0 | | |
| 24X IDE | 24x CD-ROM | WAREHOUSE | E01S3 | 1 | | 0 | | |
| 32 SDRAM | 32 meg SDRAM | WAREHOUSE | E01S3 | ~7 | | 0 | | |
| 32X IDE | 32x CD-ROM | WAREHOUSE | E01S3 | 6 | | 0 | | |
| 333PROC | 333 Processor | WAREHOUSE | AUTOCREATE | ~6 | | 0 | | |
| 4.5HD | 4.5 gig Hard Drive | WAREHOUSE | E01S3 | ~6 | | 0 | | |
| 400PROC | 400 Processor | WAREHOUSE | E01S3 | ~8 | | 0 | | |
| 40X IDE | 40x CD-ROM | WAREHOUSE | E01S3 | ~4 | | 0 | | |
| 450PROC | 450 Processor | WAREHOUSE | E01S3 | ~8 | | 0 | | |
| 500PROC | 500 Processor | WAREHOUSE | E01S3 | ~7 | | 0 | | |
| 6.5HD | 6.5 gig Hard Drive | WAREHOUSE | E01S3 | ~6 | | 0 | | |

To transfer inventory:

1. Select the desired Warehouse, Bin, and Item that inventory will be transferred out of and click **Search**. The grid will be populated with warehouse records matching the entered criteria
2. Scroll to and select the desired record in the grid that will have some (or all) of its inventory moved to another location. If desired, select multiple lines to transfer using

the Ctrl key (the same quantity from each selection will be transferred)

Note: Inventory records with a ~ indicator in the quantity field indicate that there are existing allocations against the listed inventory

1. Click **Create New Transfer** and enter the Destination Site and Destination Bin (if multibin is enabled) or Transfer Qty and Destination site into the window that appears

The image shows two instances of the 'Send To' dialog box. The top instance is titled 'Send To' and contains a section 'New Transfer Properties' with two dropdown menus: 'Destination Site:' and 'Destination Bin:'. Below these are 'OK' and 'Cancel' buttons. The bottom instance is also titled 'Send To' and contains a section 'New Transfer Properties' with two input fields: 'Transfer Qty:' and 'Destination Site:'. Below these are 'OK' and 'Cancel' buttons.

1. Click **OK**. The selected record will populate with the destination information at the bottom of the Inventory Transfers grid.

Note: Destination/Transfer information can also be entered directly into the grid.

1. Confirm the quantity to transfer in the Transfer Qty column
2. Click **Process Transfer** to complete the process

Note: If the selected record is serial or lot tracked, the Serial/Lot Selection screen appears. Select the specific serial/lot number(s) to transfer, use the arrow buttons to move selected lots from the Transfer From table to the Transfer To table, and click **OK** to finish:

Lot Selection -- Transfer (11) Lot Numbers - for Item WIRE-MCD-0001

| Transfer From Location of WAREHOUSE and bin of | | | Transfer To Location of WAREHOUSE and bin of | | |
|--|---------------|-----|--|---------------|-----|
| Lot Number | Qty Available | Bin | Lot Number | Qty Available | Bin |
| 111155 | 90.00000 | | | | |
| 44501 | 100.00000 | | | | |
| 442266 | 100.00000 | | | | |
| 8844666 | 100.00000 | | | | |
| 00441355 | 100.00000 | | | | |
| LOT1 | 1000.00000 | | | | |
| 1 | 1000.00000 | | | | |
| LOT B | 1000.00000 | | | | |

Available = 3,490

Selected = 0

OK Cancel

Note: In versions 4.1 and later, users can transfer quantities composed of multiple lots.

After the transfer is processed, a hint row will be displayed on the Inventory Transfers screen for the rows selected for transfer, indicating the success or fail of the transfer. If the transfer failed, the hint row will display the error, and a message explaining the error. If the transfer was successful, a message will be displayed, indicating the adjustment number the item was saved to.

| Item# | Item Description | Site | Qty Available | Action | Transfer Qty | Destination Site | Serial/Lot |
|------------------------|------------------------|-----------|---------------|------------------|--------------|------------------|------------|
| CBA100 | Circuit Board Assembly | WAREHOUSE | ~10 | | 0 | | |
| HA100G | Green Hand Assembly | WAREHOUSE | ~10 | | 0 | | |
| KPA100 | Keypad Assembly | WAREHOUSE | ~10 | | 0 | | |
| BA100G | Base Assembly | WAREHOUSE | ~10 | Transfer Created | 2 | SOUTH | |

Created Inventory Transfer (00000000000000067).

For a hard copy of the transfer documents, use the grid dropdown (little orange triangle in the left corner above Item #) to Export or Print the grid.