Knowledgebase > SalesPad > Inventory > Inventory Transfers

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.

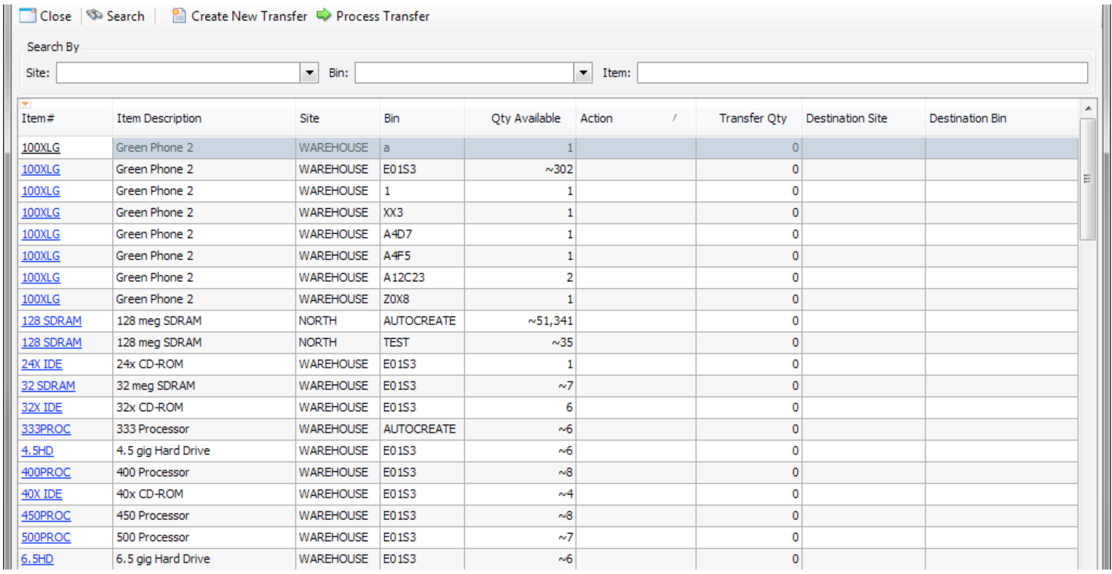
Note: Editing inventory transfer transactions is not supported in SalesPad Desktop. They will be viewed as read-only when opened after creation in GP or SalesPad.

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



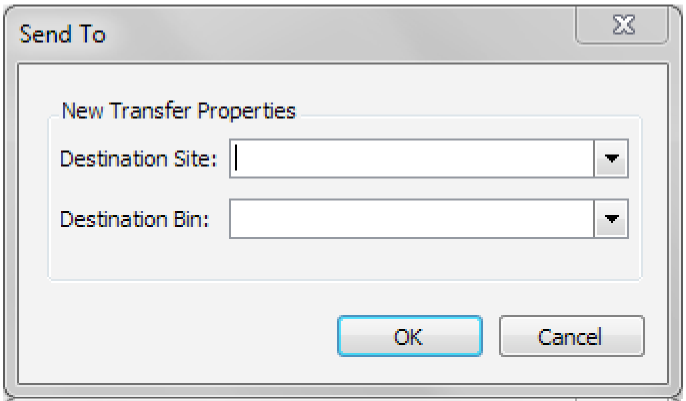
Item#	Item Description	Site	Bin	Qty Available	Action	Transfer Qty	Destination Site	Destination Bin
100XLG	Green Phone 2	WAREHOUSE	a	1		0		
100XLG	Green Phone 2	WAREHOUSE	E01S3	~302		0		
100XLG	Green Phone 2	WAREHOUSE	1	1		0		
100XLG	Green Phone 2	WAREHOUSE	XX3	1		0		
100XLG	Green Phone 2	WAREHOUSE	A4D7	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		

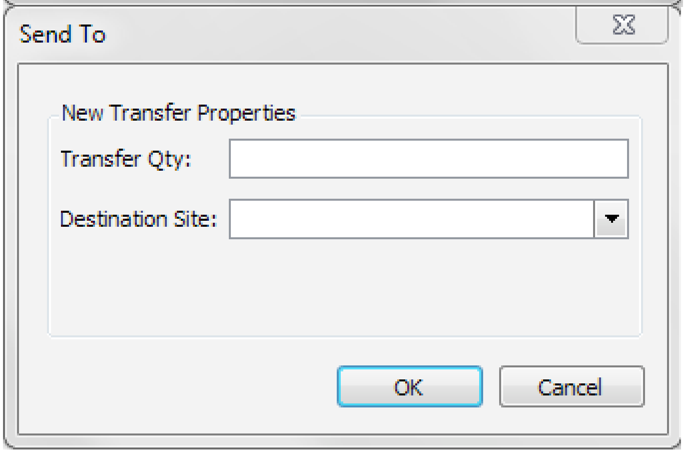
To transfer inventory:

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



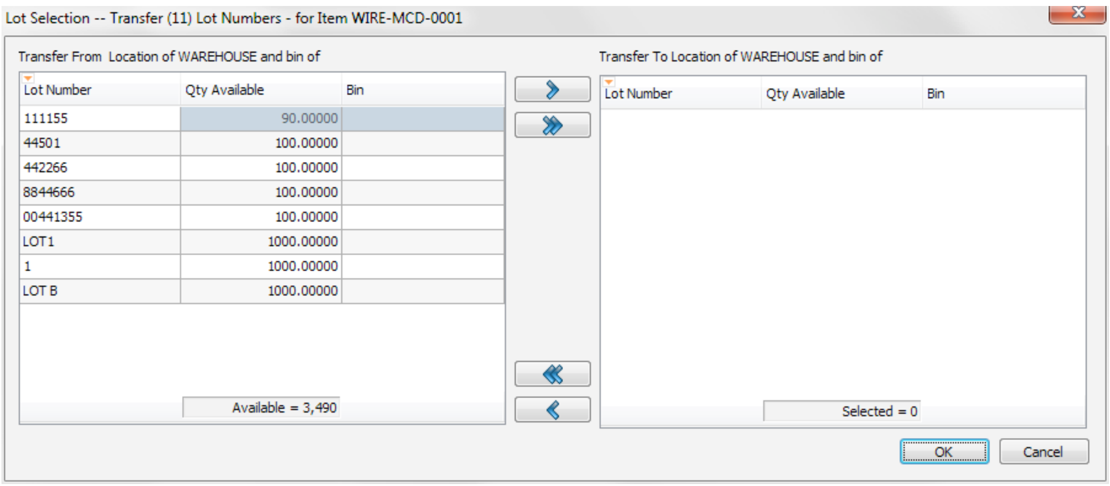


1. Click **OK**. The selected record will populate with the destination information at the bottom of the Inventory Transfers grid.

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:



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 (0000000000000067).

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.