Complete a New Location Transfer

Last Modified on 09/05/2017 10:42 am EDT

Overview

If your business operates from multiple locations, then it's likely that you'll need to shift inventory between them at some point. Since it's vital to keep track of where exactly your Items are located at any given time, OrderTime offers the Location Transfer process to facilitate transfers.

Complete a Location Transfer

On the OrderTime main page, click on the Warehouse module and select Create New Transfer section.

* Order Time	•										All Orders Demo	0
r Home	🎻 Sales	📺 Purchasing	O [®] Production	🗑 Warehouse	🔅 Reports							
Create New	~	Warehouse									Quick links	
Open Full List	-	•									Search Items	
Recent Recor	rds					E C		<u></u>			Search inventory	
101001F											 Search adjustmen Search counts 	its.
Ø 40			Cr	eate New Adjust	ment	Create N	ew Count	Create Ne	ew Transfer		Search value	
122											Search transfer	
01001A												
O 45												
Ø 44						L.						
@ 43							BIN					
0 119												
O 42				(reate New Val	ue Adjustment	Create New Bin N	love				

The Transfer screen will generate the next available adjustment number. On this screen, you will choose the Location (From), Location (to), the date, Ship Methods, Tracking No, Total Weight.

- Use the drop down menu to select locations (From and To)
- The date will be very important. Whatever transfers are completed for the chosen date, it will be marked in your books as of that date
- Under Ship Method select carrier from drop down menu
- Enter a tracking number is needed
- Enter the Total Weight

OrderTime					
r Home	<i>(</i>) Sales	👾 Purchasing 🛛	28 Production	🗑 Warehouse	🚓 Reports
Create New	v	Warehouse → Transfers → 1	Fransfer		
Open Full List	v	Transfer - 70			
Recent Records		Location From	HQ		
		Location To	TEXAS		,
Ø 40 1001F		No.	70		
122		Date	9/1/2017		(iii
🖬 01001A		Ship Method	Federal Express		,
45 44		Tracking No	02215588		
Ø 43		Total Weight	5000		
119					
④ 42					

Click on **Save** when done.

Select the Items to be transferred

On the transfer screen, under the Items tab enter the item number inside the Search Items box. You also have the option to sort your items by selecting from the drop down menu (i.e. Name/Number, Description, UPC, Manufacturer Part No, Vendor Part No)



Once the item has been selected, you must enter the quantity to be moved. Click on **Save** when done.

Warehouse > Transfers > Transfer	Created By Ian Benoliel 9/1/2017 9:07 PM Modified By Ian Benoliel 9/1/2017 9:07 PM
Transfer - 70 Create PDF + TDIT ADD COST	Status Processing *
General	Summary Revision : 1
No. 70 Date 9/1/2017 Location From HQ Location For TEXAS Tracking No 2021558 Total Weight 5000 #Pedg Ship Method Federal Express	
Item 01012A Description Washer, M-61ocking Quantity [] Sove Cancel	
ITEM DESCRIPTION QUANTITY	UOM ACTIONS

The next screen will display a listing of all the items to be transferred. If needed click on the Note icon under the ACTIONS column to make changes to the items.

- Under the General Edit screen, you will be able to review the description of the Item and make changes to the quantity.
- Under the From Bins tab, you can change/add the Bin from where the item is being transferred from
- Under the To Bins tab, you can change/add the Bin to where the item will be moved to at the destination location
- Click on Save when done

Transfer Line for Transfer 70	Save Reset
Item 01001B LineNo 1	
General Custom From Bins To Bins	
Description Caliper repair kit, GT-5Line 2Line 3 Quantity 1.0	

You can change the Transfer Status by clicking on the status drop down menu.

- Processing: Items are being processed prior to completing the transfer
- In Transit: Items are in transit, this can be selected when the items are being shipped
- Received: Items have been received at the receiving location

# Home a	& Sales	📜 Purchasing	Q [®] Production	🗑 Warehouse	Reports												
Create New	v	Warehouse > Transfer										Created By Ian Benoliel 9/1/2017 9:07 PM Modified By Ian Benoliel 9/1/2017 9:07 PM					
Open Full List 🖉		Transfer - 70 Create PDF 👻 Torr ADD coor											Status	Processing *			
Recent Records 1 70 1 0101A 0 40 1 0101F 0 122 0 45 0 44		General Summary Revision : 1											_	In Transit			
		No. 70 Date 9/12017 Location From HQ Location To TEVAS Tracking No 0221558 TrasWeight 5000 #POdg Ship Method Federal Express												₽ ₽			
43119		Name/Number	٣	Search Items		•											
		ITEM	DES	CRIPTION					QUANTITY		UOM		ACTIONS				
		01001B	Calij	per repair kit, GT-5Line 2Line	3				1		EA		80				
		01002A	Spri	ng brake pad anti-rattle					1		EA		80				

If you need to add a cost for transferring items between warehouses, you add such cost by clicking on the **Add Cost** icon next to the transfer number. On the screen you can complete the following:

- Enter an amount
- Select the account to be assigned (i.e. Account Payable, freight, duties, Cost of Goods Sold, etc.)
- Select the Vendor
- Enter a Reference Number
- Allocation Assignment (Cost, Quantity, Volume, Weight)

Click on Save when done.