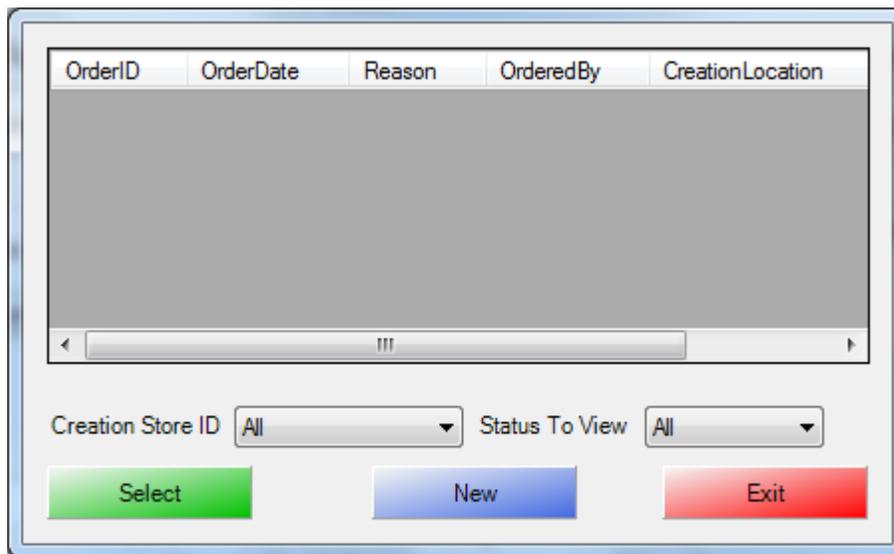


Inventory Transfers Between Stores



If you are using the host module or advanced host module, you have the ability to transfer inventory from one store to another.

This document will cover transferring inventory using the Host Module and Advanced Host Module Hybrid Sync methods, both at the corporate and store levels.

Host Module Configuration

The location that will be acting as the corporate or host module station we need to be configured so.

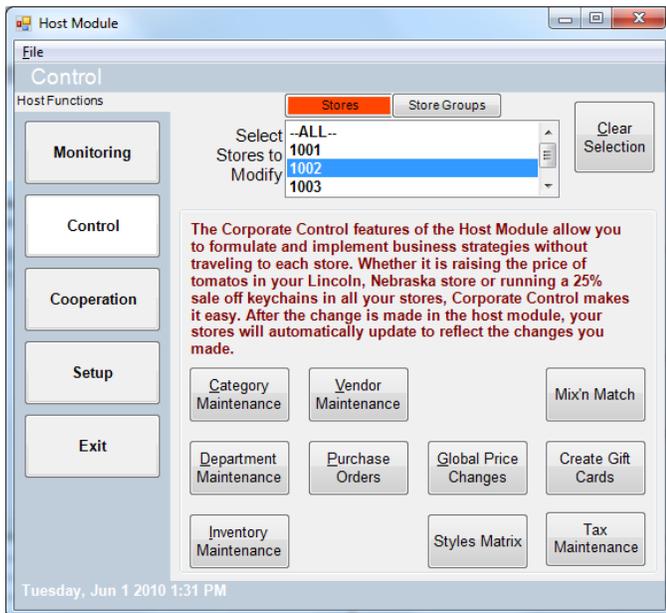
At the login screen select **File** then **Select Business Type...**



Select **A Corporate Office for a Chain of Stores or Restaurants**.

Select **Next**.

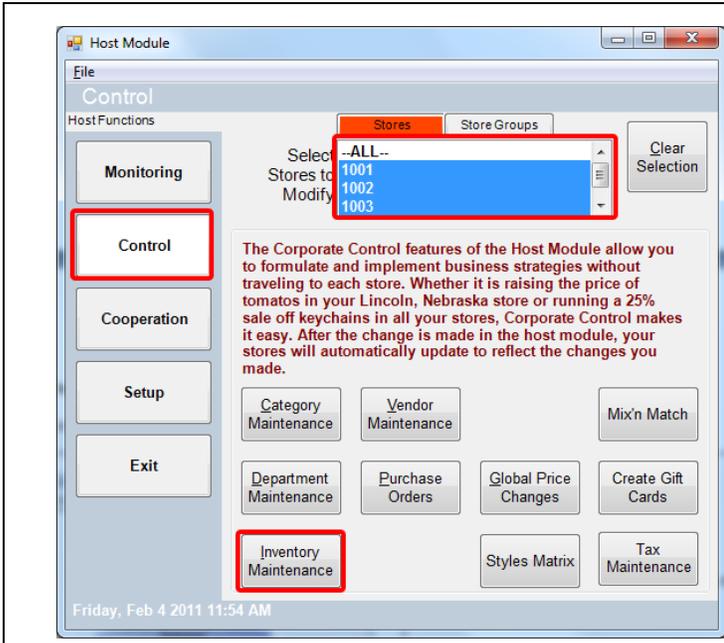
You will then need to login to CRE/RPE as you normally would.



Here you will have the ability to edit one or more of the stores information at the same time.

Host Module Transfers

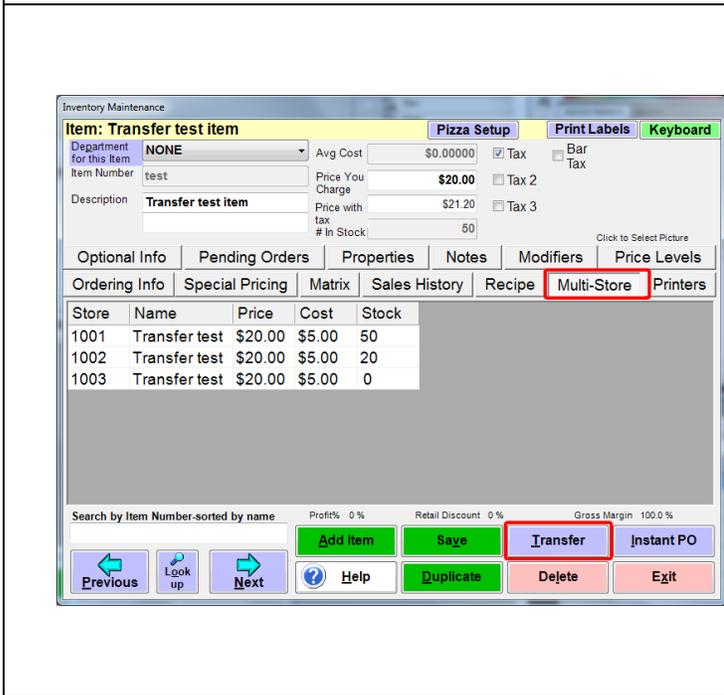
After logging into the Host Module:



1. Select **Control**.
2. Select the stores you would like to edit from the top.

Note: You can select ALL which will give you the ability to display each store's inventory.

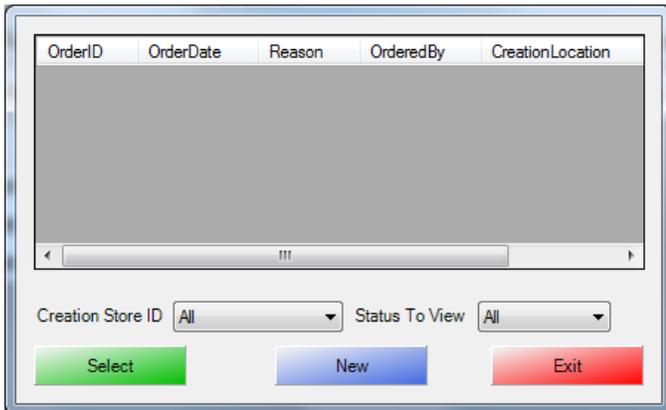
3. Select **Inventory Maintenance**.



4. Select the **Multi-Store** tab.

Note: Here you will see the inventory stock level for each store you selected on the previous screen. This will help you when trying to decide which location you would like to transfer inventory to.

5. When done checking the inventory levels of each store, select **Transfer**.



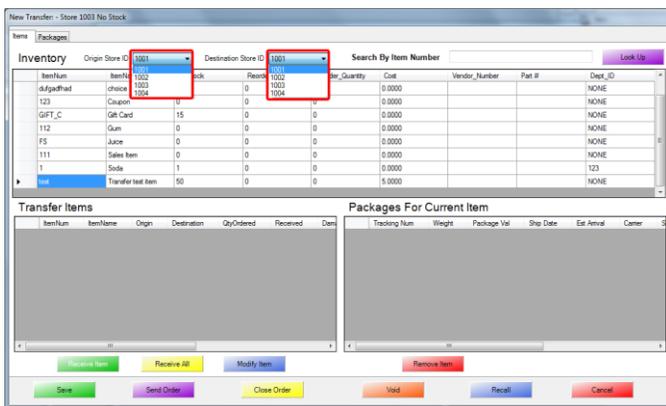
6. At this window we can view, create new, and edit item transfers.

Note: Use the dropdowns to filter results.

7. Select **New**.

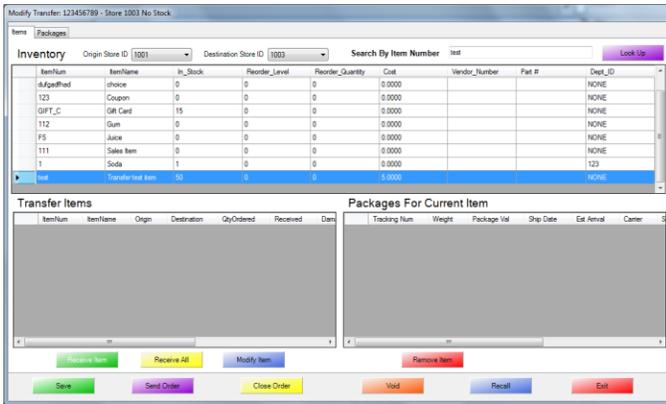


8. Enter a reason for the transfer, and select **Enter**.



9. Select the **Origin Store ID** and the **Destination Store ID**.

Note: While editing transfers using the host module you will be able to select any store as the **Origin Store ID**. While performing a transfer at the store level you will only be able to select the Store ID of the store at which you are located.



10. To add items to the **Transfer Items** list you can either do one of the following:

- Double-Click an item in the list.
- Scan the barcode of the item or enter the item number in the **Search By Item Number** field.
- Select **Look Up** which will open the inventory look up window.

How many would you like to add to the transfer

10

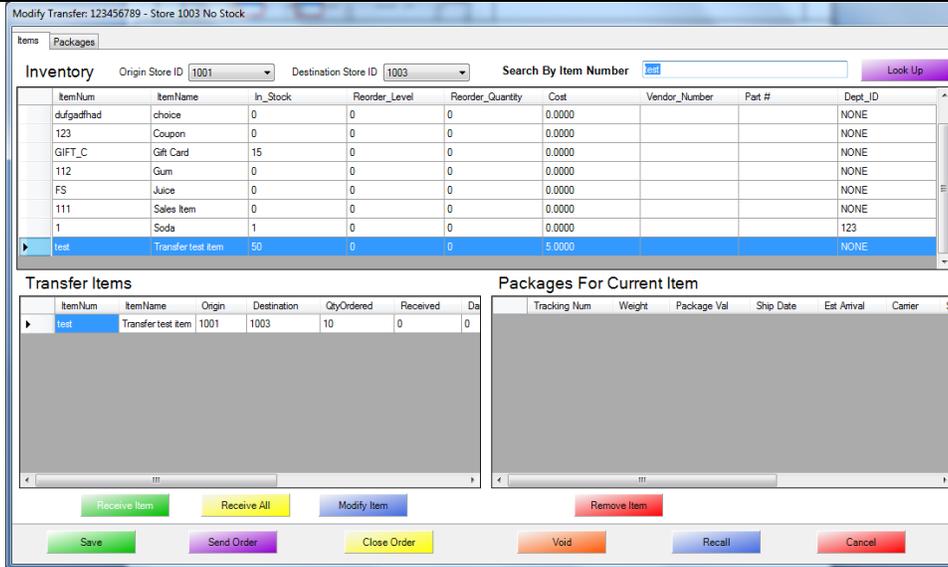
7	8	9
4	5	6
1	2	3
.	0	+/-

Clear

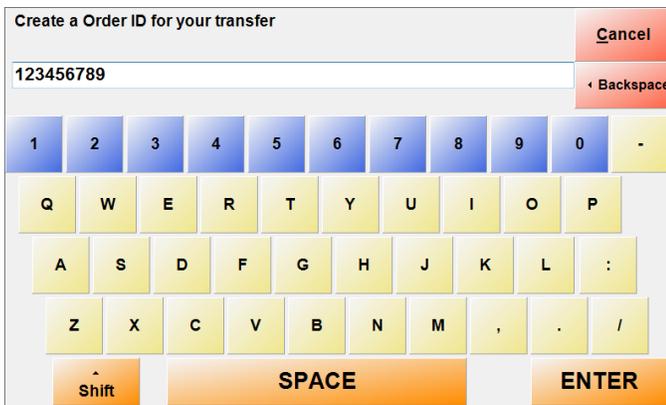
Cancel

OK

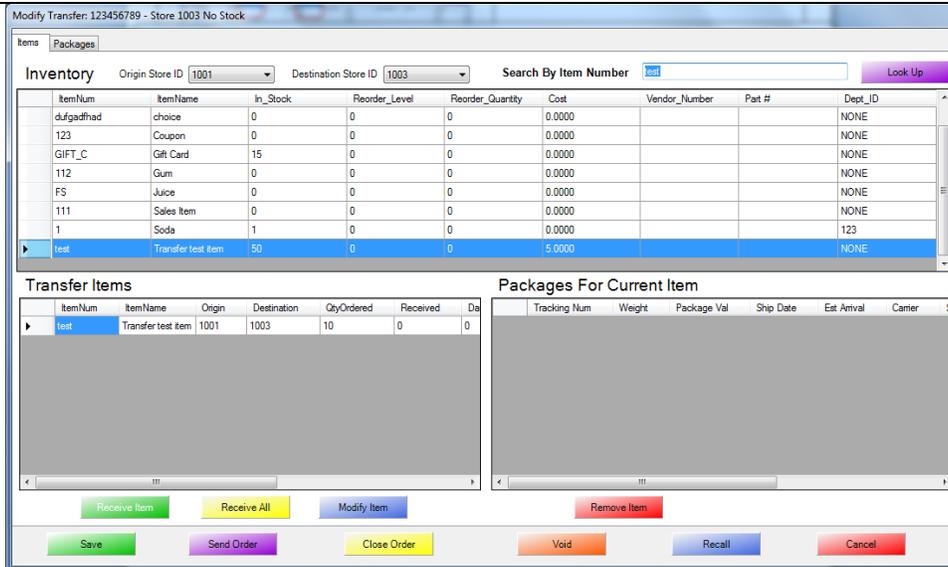
11. Enter the number of the item you would like to add to the **Transfer Items** List.



12. Select **Save**.

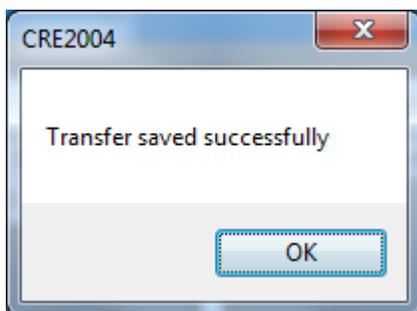


13. You will be asked to enter an Order ID, which will be how you will reference the transfer.



14. If the inventory to be transferred will not need to be shipped (i.e. if someone will be driving it there now) then you can select **Send Order**.

Note: If the inventory will need to be shipped to another store please see the **Creating Packages** section at the end of this document.



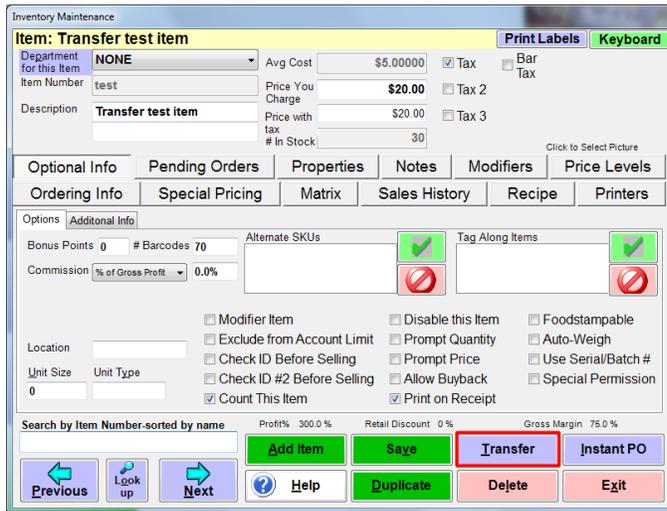
15. Select **OK**.

Store Level Transfers

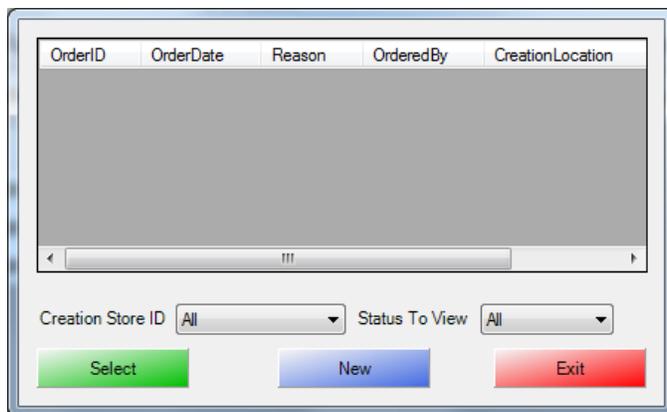
From the Login screen select Manager and enter your credentials then select OK.



1. Select **Administrative** and then **Inventory Maintenance**.



2. Select **Transfer**.



3. At this window we can view and create new item transfers.
Note: Use the dropdowns to filter results.
4. Select **New**.

Enter a reason for the transfer. Cancel

Store 1003 No Stock Backspace

1	2	3	4	5	6	7	8	9	0	-
Q	W	E	R	T	Y	U	I	O	P	
A	S	D	F	G	H	J	K	L	:	
Z	X	C	V	B	N	M	,	.	/	
Shift		SPACE					ENTER			

5. Enter a reason for the transfer, and select Enter.

New Transfer: 1003 No Stock

Items [Packages] Look Up

Inventory Origin Store ID: 1001 Destination Store ID: 1002 Search By Item Number: Look Up

ItemNum	ItemName	In_Stock	Reorder_Level	Reorder_Quantity	Cost	Vendor_Number	Part #	Dept_ID
choice		0	0	0	0.0000			NONE
123	Coupon	0	0	0	0.0000			NONE
GFT_C	Gift Card	15	0	0	0.0000			NONE
112	Gum	0	0	0	0.0000			NONE
F5	Juice	0	0	0	0.0000			NONE
111	Sales Item	40	0	0	0.0000			NONE
1	Soda	1	0	0	0.0000			123
test	Transfer test item	30	0	0	5.0000			NONE

Transfer Items Packages For Current Item

ItemNum	ItemName	Origin	Destination	QtyOrdered	Received	Cost

Buttons: Receive Item, Receive All, Modify Item, Remove Item, Save, Send Order, Close Order, Void, Recall, Cancel

6. Select the **Origin Store ID** and the **Destination Store ID**.

Note: While editing transfers at the store level you will only be able to set the **Origin Store ID** as the store you are creating the transfer from (1001).

Modify Transfer: 123456789 - Store 1003 No Stock

Items [Packages] Look Up

Inventory Origin Store ID: 1001 Destination Store ID: 1003 Search By Item Number: test Look Up

ItemNum	ItemName	In_Stock	Reorder_Level	Reorder_Quantity	Cost	Vendor_Number	Part #	Dept_ID
choice		0	0	0	0.0000			NONE
123	Coupon	0	0	0	0.0000			NONE
GFT_C	Gift Card	15	0	0	0.0000			NONE
112	Gum	0	0	0	0.0000			NONE
F5	Juice	0	0	0	0.0000			NONE
111	Sales Item	40	0	0	0.0000			NONE
1	Soda	1	0	0	0.0000			123
test	Transfer test item	30	0	0	5.0000			NONE

Transfer Items Packages For Current Item

ItemNum	ItemName	Origin	Destination	QtyOrdered	Received	Cost

Buttons: Receive Item, Receive All, Modify Item, Remove Item, Save, Send Order, Close Order, Void, Recall, Exit

7. To add items to the **Transfer Items** list you can either do one of the following:

- Double-Click an item in the list.
- Scan the barcode of the item or enter the item number in the **Search By Item Number** field.
- Select **Look Up** which will open the inventory look up window.

How many would you like to add to the transfer

10

<u>7</u>	<u>8</u>	<u>9</u>
<u>4</u>	<u>5</u>	<u>6</u>
<u>1</u>	<u>2</u>	<u>3</u>
.	<u>0</u>	+/-

Clear Cancel

OK

8. Enter the number of the item you would like to add to the **Transfer Items** List.

Modify Transfer: 123456789 - Store 1003 No Stock

Items Packages

Inventory Origin Store ID: 1001 Destination Store ID: 1003 Search By Item Number: [] Look Up

ItemNum	ItemName	In_Stock	Reorder_Level	Reorder_Quantity	Cost	Vendor_Number	Part #	Dept_ID
d/fgadhad	choice	0	0	0	0.0000			NONE
123	Coupon	0	0	0	0.0000			NONE
GIFT_C	Gift Card	15	0	0	0.0000			NONE
112	Gum	0	0	0	0.0000			NONE
FS	Juice	0	0	0	0.0000			NONE
111	Sales Item	0	0	0	0.0000			NONE
1	Soda	1	0	0	0.0000			123
test	Transfer test Item	50	0	0	5.0000			NONE

Transfer Items

ItemNum	ItemName	Origin	Destination	QtyOrdered	Received	Da
test	Transfer test Item	1001	1003	10	0	0

Packages For Current Item

Tracking Num	Weight	Package Val	Ship Date	Est Arrival	Carrier	S
--------------	--------	-------------	-----------	-------------	---------	---

Receive Item Receive All Modify Item Remove Item

Save Send Order Close Order Void Recall Cancel

9. Select **Save**.

Create a Order ID for your transfer

123456789

Cancel

Backspace

1 2 3 4 5 6 7 8 9 0 -

Q W E R T Y U I O P

A S D F G H J K L :

Z X C V B N M , . /

Shift SPACE ENTER

10. You will be asked to enter an Order ID, which will be how you will reference the transfer.

Modify Transfer: 123456789 - Store 1003 No Stock

Items Packages

Origin Store ID: 1001 Destination Store ID: 1003 Search By Item Number: [] Look Up

ItemNum	ItemName	In_Stock	Reorder_Level	Reorder_Quantity	Cost	Vendor_Number	Part #	Dept_ID
d\fgadhad	choice	0	0	0	0.0000			NONE
123	Coupon	0	0	0	0.0000			NONE
GIFT_C	Gift Card	15	0	0	0.0000			NONE
112	Gum	0	0	0	0.0000			NONE
FS	Juice	0	0	0	0.0000			NONE
111	Sales Item	0	0	0	0.0000			NONE
1	Soda	1	0	0	0.0000			123
test	Transfer test item	50	0	0	5.0000			NONE

Transfer Items

ItemNum	ItemName	Origin	Destination	QtyOrdered	Received	Da
test	Transfer test item	1001	1003	10	0	0

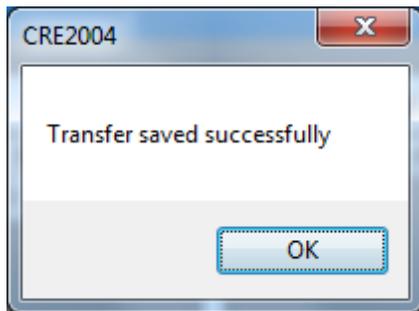
Packages For Current Item

Tracking Num	Weight	Package Val	Ship Date	Est Arrival	Carer	S
--------------	--------	-------------	-----------	-------------	-------	---

Receive Item Receive All Modify Item Remove Item Save Send Order Close Order Void Recall Cancel

11. If the inventory to be transferred will not need to be shipped (i.e. if someone will be driving it there now) then you can select **Send Order**.

Note: If the inventory will need to be shipped to another store please see the **Creating/Receiving Packages** section at the end of this document.

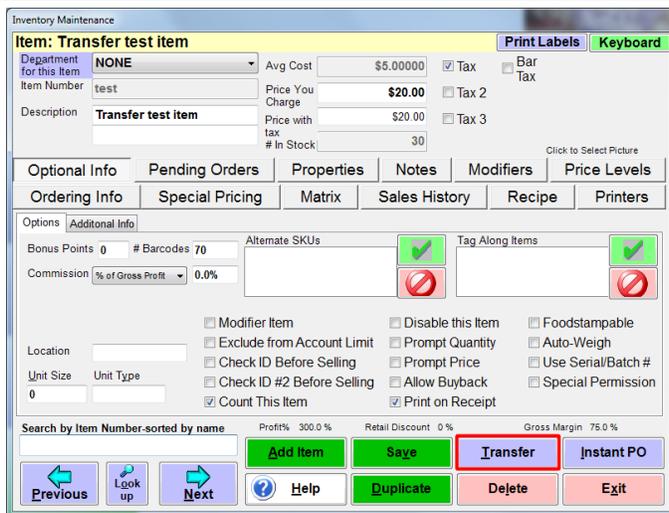


12. Select **OK**.

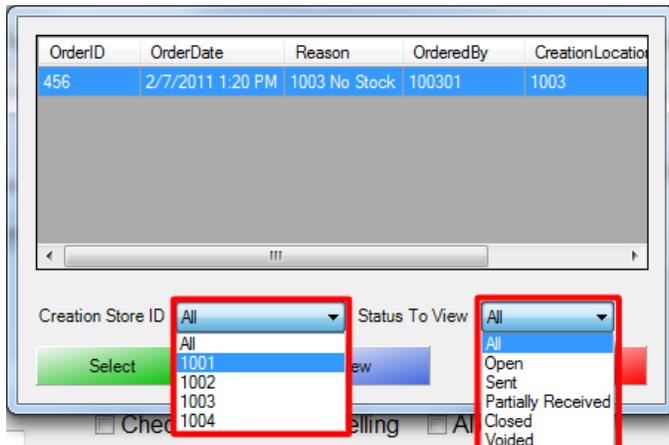
Receiving Items at Your Store



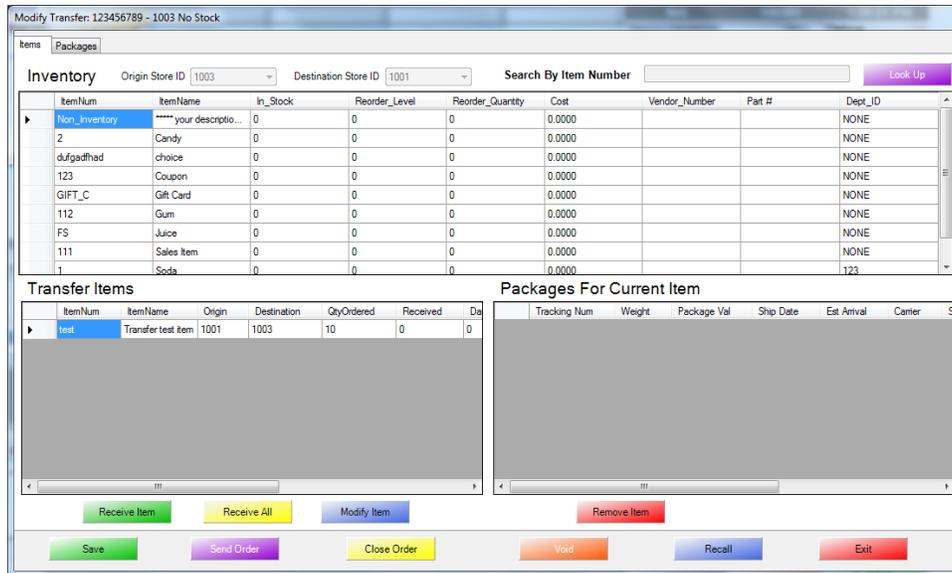
1. Select **Administrative** and then **Inventory Maintenance**.



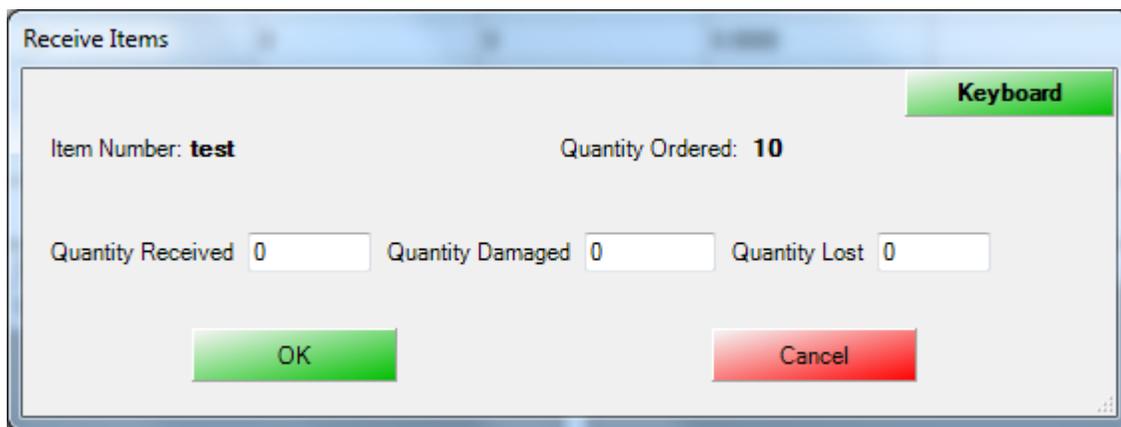
2. Select **Transfer**.



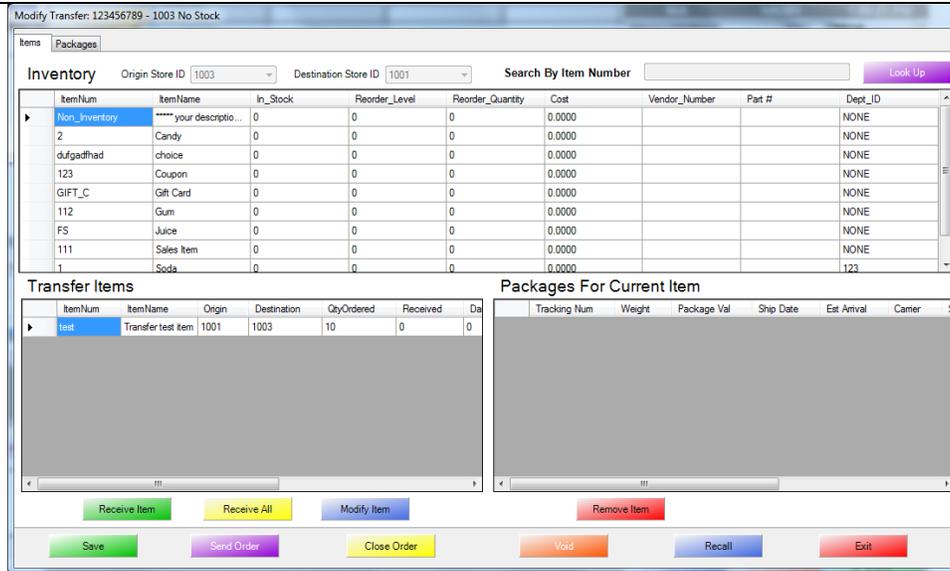
3. At this window we can view and receive transferred inventory for all stores.
- Note:** Use the dropdowns to filter results.
4. Highlight the Transfer you would like to receive and select, **Select**.



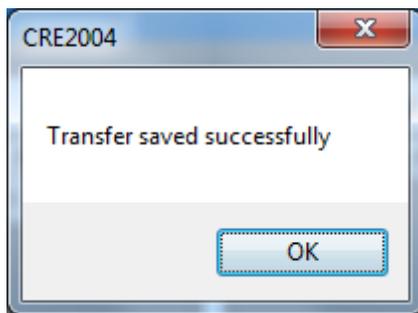
5. To receive every item in the transfer at once, select **Receive All**.
6. To receive items individually select Receive Item (or Double-click an item in the Transfer Items list).



7. At the Receive Items window enter the following information:
 - Quantity Received
 - Quantity Damaged
 - Quantity Lost
8. When done select **OK**.



9. To complete the transfer select **Close Order** then select **Save**.



10. Select **OK**, then select **Exit**.

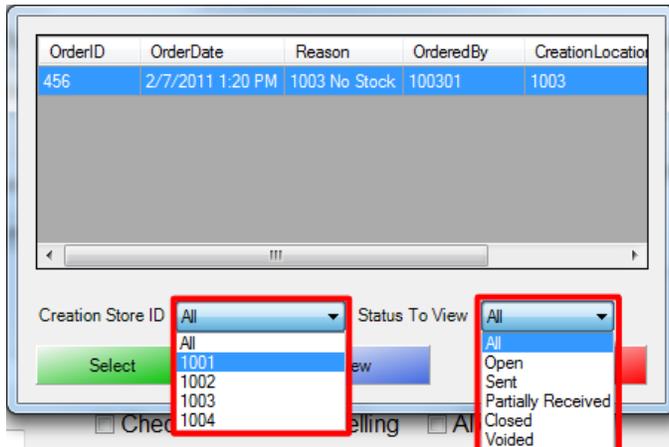
Creating/Receiving Packages

If your inventory that is being transferred needs to be shipped you can use the package creator, to keep track of the packages, as well as printing packing lists.



1. Select **Administrative** and then **Inventory Maintenance**.

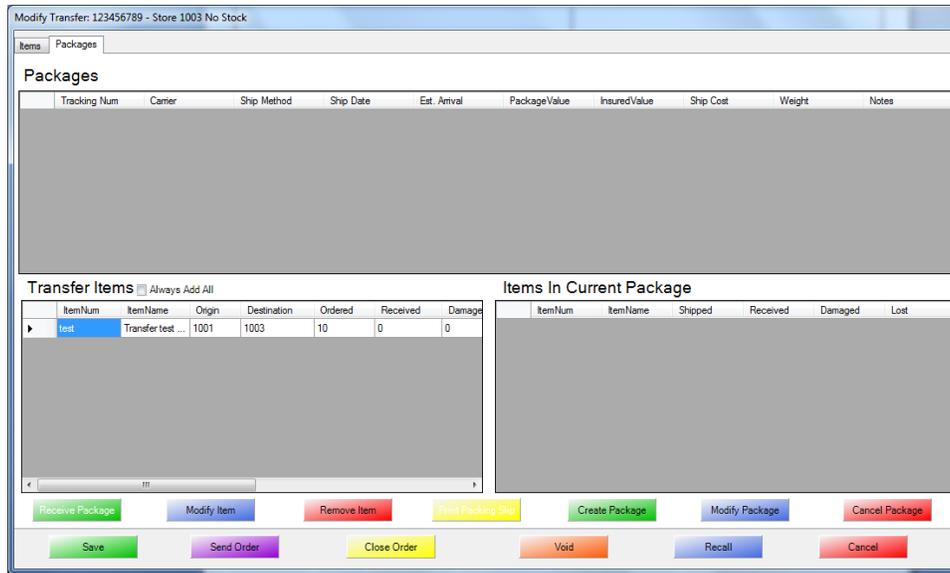
2. Select **Transfer**.



3. At this window we can view and receive transferred inventory for all stores.

Note: Use the dropdowns to filter results.

4. Highlight the Transfer you would like to edit and select, **Select** or select **New**.



5. Select the **Packages** tab.

6. Select **Create Package**.

PackageDesigner

Carrier: FedEx Specify Other: Ship Method: Keyboard

Value: \$0.00 Insured: \$0.00 Shipping Cost: \$0.00

Weight: Shipping Date: 2/ 4/2011 Estimated Arrival: 2/ 8/2011

Tracking:

Notes:

< OK Cancel >

7. Enter any information relating to the package.

8. When done select **OK**.

Modify Transfer: 12346 - 123

Items Packages

Packages

Tracking Num	Carrier	Ship Method	Ship Date	Est. Arrival	Package Value	Insured Value	Ship Cost	Weight	Notes
123456789456789	FedEx	ground	2/4/2011	2/8/2011	100.00	200.00	5.00	3	this item is being s...

Transfer Items Always Add All

ItemNum	ItemName	Origin	Destination	Ordered	Received	Damage
111	Sales Item	1003	1001	5	0	0

Items In Current Package

ItemNum	ItemName	Shipped	Received	Damaged	Lost
---------	----------	---------	----------	---------	------

Receive Package Modify Item Remove Item Print Packing Slip Create Package Modify Package Cancel Package

Save Send Order Close Order Void Recall Exit

9. To add items to the package double-click the item you would like to add.

Optionally you can select **Always Add All** which will automatically add all the items to be transferred to the package.

How many of the current item are in the package?

3

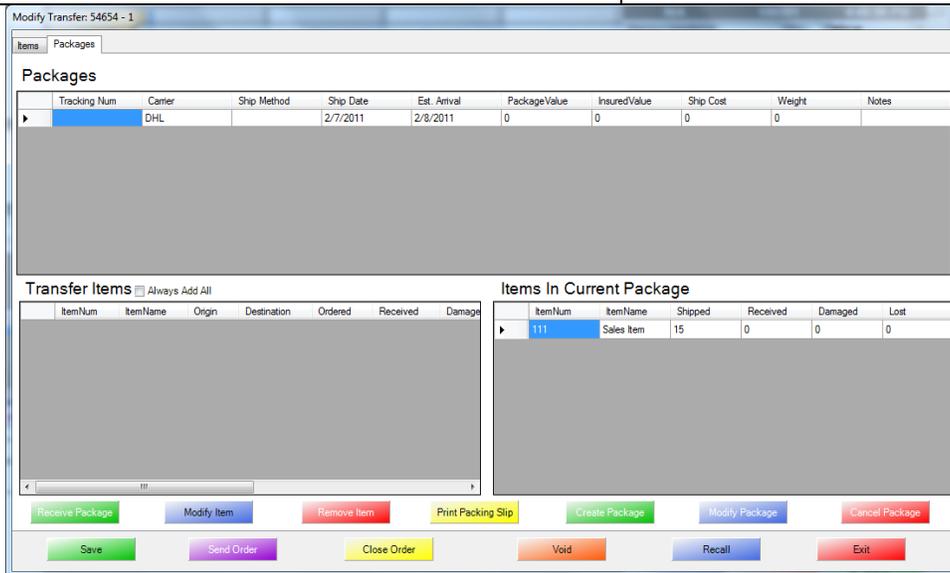
7	8	9
4	5	6
1	2	3
.	0	+/-

Clear Cancel

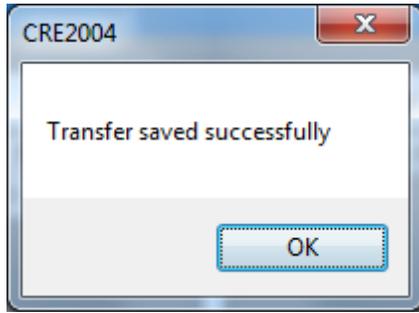
OK

10. If **Always Add All** is not selected then you will be prompted to enter the number of the item you would like in this package.

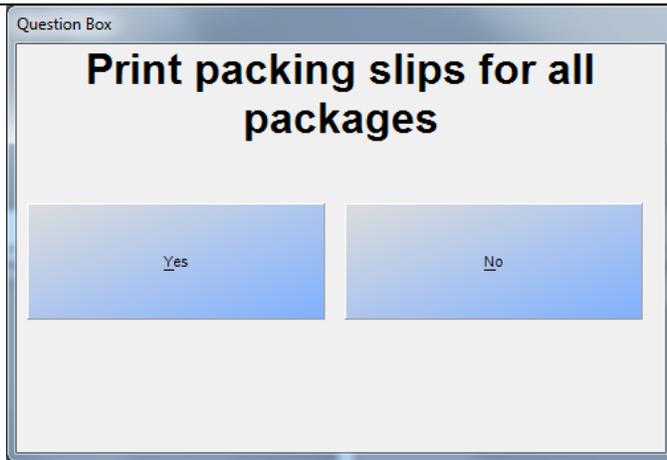
11. When done select **OK**.



12. When done adding items to the package select **Close Order** then select **Save**.



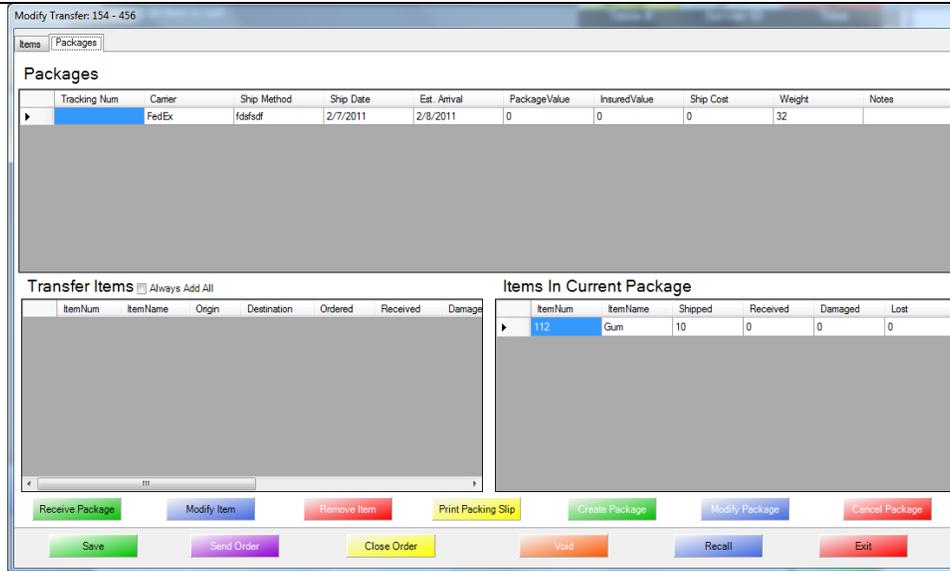
13. Select **OK**.



14. To print packing slips select **Yes**, otherwise select **No**.

Please see below for an example packing slip.

Destination Address		Order ID		Date	
		123456789		2/4/2011	
Origin Address		Origin ID		Carrier	
		1001		FedEx	
		Destination ID		Method	
		1003		Express	
		Carrier ID		Tracking Number	
		100101		987654	
Quantity	Item Number	Description	Cost		
10.00	test	Transfer test item	\$5.00		
Notes: The items in this package are being transferred from store 1001 to store 1003			Total Items:	10	
			Total Cost:	\$150.00	
			Weight:	10.00	
			Shipping Cost:	\$10.00	
			Insured:	\$100.00	
Page 1					



15. To receive a package open **Inventory Maintenance**. Select the **Transfer** button and finally the **Packages** tab.

16. Select **Receive Package**.



17. At the Receive Package window enter the following information:

- Quantity Received
- Quantity Damaged
- Quantity Lost

18. When done select **OK**.

19. To complete the transfer select **Close Order** then select **Save**.

20. Select **Exit**.