Pending Transfers Guide

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Overview of Pending Transfers

Pending Transfers provide a method for a store to request merchandise from another store. This allows for inventory to be transferred from one store to another while still allowing for the store transferring the merchandise to adjust the transferred quantities before the transaction is complete.

There are three steps to the Pending Transfer process. First, the requesting store creates the transfer and sends it to the store from which they are requesting merchandise. Second, the other store reviews the request and verifies what inventory they can send, and sends the updated request back to the requesting store. Finally, the requesting store reviews the updated transfer, and verifies it against the physical merchandise that the other store has sent them, and applies the transfer to their inventory.


1. **From Store –** The store that the inventory will be coming from.
2. **To Store –** The store that created the request and will have inventory coming to it.
3. **Status –** An indicator designed to tell what step the pending transfer is currently on.
   - This will say 'Unsent' for a new transfer, or 'In Progress' for a transfer request that has been sent.
4. **Created –** The date that the transfer was created.
5. **Notes –** Optional field to add notes for your records and bookkeeping.

Creating a Pending Transfer

1. In **Director**, choose the **Inventory** module.

2. Then, choose the **Pending Transfers** option from the menu ribbon.
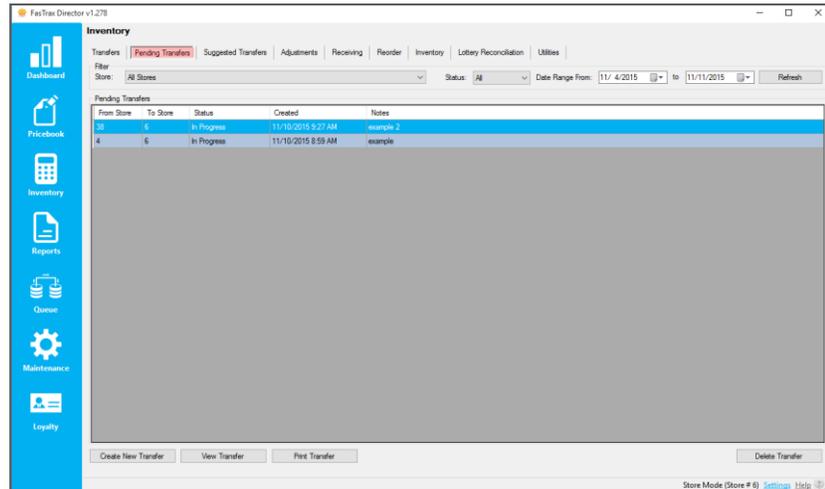
3. Choose the **Create New Transfer** button.

   If you already have the transfer created, you can instead select the **View Transfer** button to edit its contents.
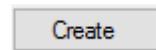

4. In the **New Pending Transfer** window, select the **From Store** using the Dropdown menu, and enter any necessary **Notes** in the text box.

   Note that the **To Store** box has defaulted to the current store, and **cannot** be changed to anything else.
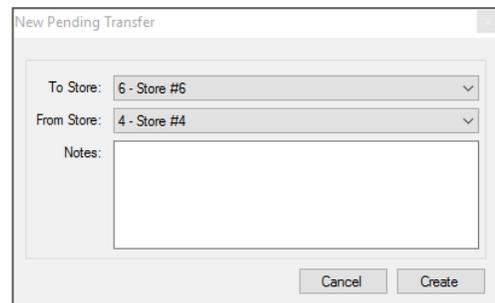
5. Choose **Create** when finished, and the **Pending Transfer Worksheet** will open.

Adding Items and Sending the Transfer Request

1. On the **Pending Transfer Worksheet**, Select **Add Item;** this will open the **Find Item** window.

   > If you already have items on the worksheet, you can Change them with the **Edit Item** button, or remove them with the **Delete Item** button.

2. Type in the UPC Number for the item to be transferred, and click **Find**.

   > Items can also be located by their **Description** or **Vendor Part Number** by selecting the appropriate option from the **Find Items By** dropdown menu.

3. Enter the **Requested Qty** in the **Pending Transfer Details** window, and click **Save**.

4. Repeat steps 1 through 3 until all needed items have been added, then click **Send**.

# Updating Quantities and Applying the Pending Transfer

After a Pending Transfer has been sent, the store that it was sent to (which was selected as the **From Store** above) reviews the Pending transfer and updates the quantities

1. In the **Pending Transfers** screen, select a new Pending Transfer that needs to be updated and click the **View Transfer** button.
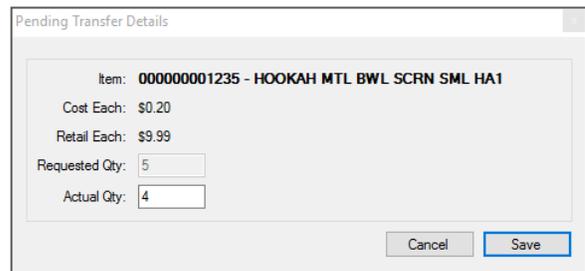
   Pro Tip: Pending Transfers that come from another store will have that store number in the **To Store** field, and will have a **Status** of "In Progress".
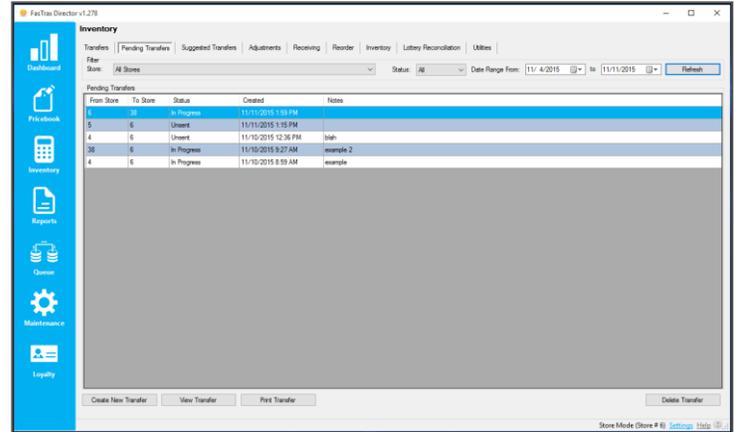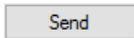

2. Double-click any item you want to edit in the **Pending Transfer Worksheet.**
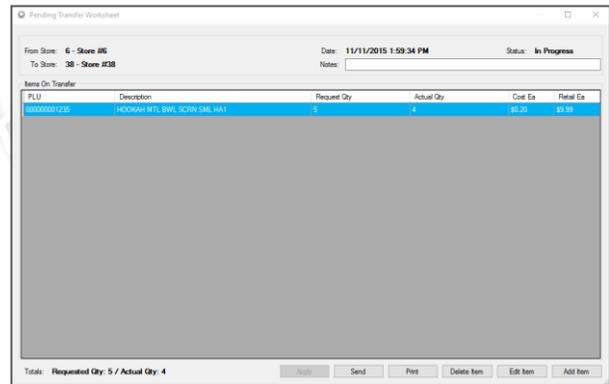
3. Update the **Actual Qty** and click **Save.**

4. Repeat steps 2 and 3 until finished updating items; then click **Send** to apply changes to this store's inventory and send the transfer back to the requesting store.

Final Steps

Once the requesting store receives the updated transfer, it's time to review the transfer and apply it to the requesting store's inventory.

1. At the requesting store, open the **Pending Transfer Worksheet** for the transfer in question.

   > Note that the only buttons available are the **Print** and **Apply** buttons.

2. Compare the **Actual Qty** against the physical inventory received from the other store.

3. Once all inventory quantities are confirmed, click **Apply.** This will update your inventory on hand with the **Actual Qty** from the transfer.