

Pending Transfers Guide

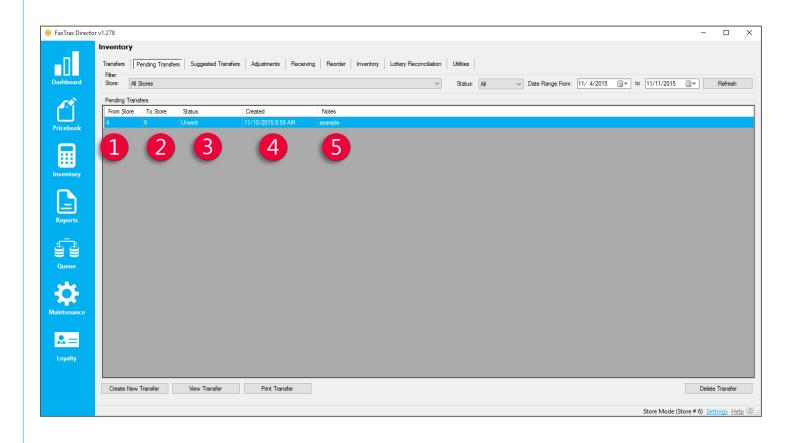
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Overview of Pending Transfers

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.



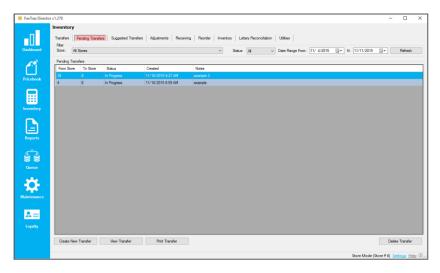
- **1** From Store The store that the inventory will be coming from.
- **To Store** The store that created the request and will have inventory coming to it.
 - Status An indicator designed to tell what step the pending transfer is currently on.
 - o This will say 'Unsent' for a new transfer, or 'In Progress' for a transfer request that has been sent.
- Created The date that the transfer was created.
- 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.

To Store:	6 - Store #6		
From Store:	4 - Store #4		
Notes:			

Create New Transfer

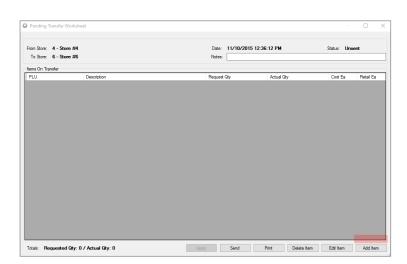
5. Choose Create when finished, and the Pending Transfer Worksheet will open.

Create

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.



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Find

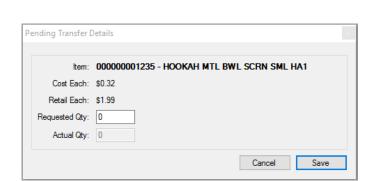
Cancel OK

Find Items By: UPC Number

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**.

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".

	v1.278 Inventory								-	
our d			8 Suggested Transfers	Adjustments Receiving	Reorder Inventi		Utilities Date Range From: 11/ 4/201			Refree
					Ŷ	Status: All	Date Hange Hon: 11/ 4/201	5 U* 16 11/11/2015		Hetre
	Pending Tra		Status	Created	Notes					
	Hrom Store	10 Store 38		11/11/2015 1:59 PM	TNOTES					
book	5	6	In Progress Unsent	11/11/2015 1:59 PM						
	4	6	Unsent	11/10/2015 12:36 PM	bløh					
	38	6	In Progress	11/10/2015 9:27 AM	example 2					
	30	6	In Progress	11/10/2015 8:59 AM	example 2					
orts										
ulty	Create No	w Transfer	View Tsanafer	Print Transfer					Delete	Transfe

2. Double-click any item you want to edit in the Pending Transfer Worksheet.

10 Store: 38 - 50	ne #6 one #38	Date: 11/11/20 Notes:	15 1:59:34 PM	Status: In F	rogress
terrs On Transfer PLU	Description	Request Qty	Actual Qty	Cost Ea	Retal E
000000001235	HOOKAH MTL BWL SCRN SML HA1	5	4	\$0.20	\$9.99
		Acoly Send	Print Delete itom	Edit Item	Add b
	Qty: 5 / Actual Qty: 4				

3. Update the Actual Qty and click Save.

Item:	000000001235 - HOOKAH MTL BWL SCRN SML HA1
Cost Each:	\$0.20
Retail Each:	\$9.99
Requested Qty:	5
Actual Qty:	4

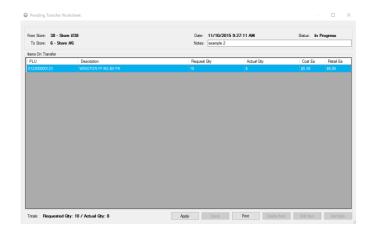
Repeat steps 2 and 3 until finished updating items; then click Send to apply changes to this store's inventory back to the
 Send requesting store.

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.

For assistance, please contact Technical Support at Support@FasTraxPOS.com