

# 19.2 Multi-Store Transfers

## Contents

Overview .....	2
Transfer Tab .....	3
Receive Tab .....	5
Request Tab.....	6
Open Tab .....	7
Print Tab .....	8
Transfer History.....	9
Other Options.....	9
How To .....	10
Transfer an Item.....	10
Receive an Item.....	10
Request an Item .....	10
Cancel a Transferred or Requested Item .....	11
Print a Transfer.....	11
Enable Email Notifications .....	11
Reports.....	12
In Transit Report.....	12
Transfer Report .....	12
Settings and Security .....	14
System Options .....	14
Permissions .....	14

## Overview

To open the **Transfer Screen**, click **Inventory > Inter-Store > Transfers**.

The screenshot shows the Transfer Screen interface. On the left, there is a navigation menu with five tabs: Transfer (5 pending items), Receive (3 pending items), Request (0 pending items), Open (8 pending items), and Print. The main area is divided into three sections:

- Section A:** Navigation tabs on the left side.
- Section B:** Form fields for Item #, Ship To, Ship Date, Ship Via, Tracking #, and Notes. The Transfer # is TR\_ST1\_4\_4\_2019\_1.
- Section C:** Transfer History table showing a log of transfer activity.

Item #	Note	Type	Qty	UOM	Ship To	From	Ship Date	Via	Tracking	Transfer #	Message
001-850-2000002		Cancel	2		1		4/4/2019 11:11:18			RQ_ST1_4_4_2019_1	Request Canceled at
001-850-2000002		Request	2	0	1	2	4/4/2019 11:11:18			RQ_ST1_4_4_2019_1	Item Requested At: 4/4/2019 11:11:18
001-200-1000002		Receive	1	0	1	Store #2	4/4/2019 10:32:44	Federal Express: SE-522214		TR_ST2_4_4_2019_1	Item Received At: 4/4/2019 10:32:44
001-100-1000001		Receive	1	0	1	Store #2	4/4/2019 10:32:44	Federal Express: SE-522214		TR_ST2_4_4_2019_1	Item Received At: 4/4/2019 10:32:44

The form automatically refreshes every 5 minutes but can be manually refreshed using the **Refresh Transfers** button.

The **Transfer Screen** is divided into three sections.

- A** There are 5 tabs. These control what is displayed in area B. The number in the green circle indicates how many pending items are on that tab.
  - Transfer** Allows you to transfer items to other stores.
  - Receive** Allows you to receive items transferred to your store.
  - Request** Allows you to request items from other stores.
  - Open** Shows all open transfers; can be used to cancel a transfer.
  - Print** Allows you to print a transfer slip showing all items included on a specific transfer.
- B** This form corresponds to the currently selected tab. Fields and options will vary depending on which tab is selected. See the next sections for specific information on each tab.
- C** This is a running log of transfer history for the current session. Closing the Transfer Screen will end the session and clear the log.



**NOTE:** Double clicking on a transferred item in any of the Transfer tabs will open the item record.

## Transfer Tab

This tab opens a form allowing you to transfer items to other stores. It will also display items requested from your store for easy fulfillment. This form is divided into top and bottom sections.

Item #	No.	Qty Requested	UOM Requested	Requesting Store	Location	Vendor / Style	Request Date	Transfer #	Description
001-210-1000001	1	0	2	Case 1	DEC / ER1212BTW	4/4/2019 10:13:23 AM	RQ_ST2_4_4_2019_1	14KW Blue Topa Colored Stone E	
001-210-1000003	1	0	2	Case 1	DEC / ER2323EM	4/4/2019 10:33:45 AM	RQ_ST2_4_4_2019_2	14KY Ladies Em Stone Earrings	
001-210-1000006	1	0	2		DEC / PD2323EM	4/4/2019 10:33:53 AM	RQ_ST2_4_4_2019_3	14KY Ladies Em Stone Pendant	
001-210-1000008	1	0	2		DEC / PD2323EM	4/4/2019 10:34:10 AM	RQ_ST2_4_4_2019_4	14KY Ladies Em Stone Pendant	
001-210-1000007	1	0	2		DEC / PD2323EM	4/4/2019 10:34:17 AM	RQ_ST2_4_4_2019_5	14KY Ladies Em Stone Pendant	

The top of this form defines where and how the item is being transferred. Fields and buttons include:

**Item #** Scan or manually key in an item to transfer it. You must specify shipping information first (**Ship To** is required, other fields are optional).

**Ship To** The store being shipped to.

**Ship Date** The date this item is being shipped. It will default to today. Cannot backdate.

**Ship Via** The method of shipment for this transfer. List values are derived from the **Shipping Methods** list (Administrative > Lists). This field also accepts text entry.

**Notes** Notes to accompany this transferred item. Check the **Pop-up Notes** box if you want the note displayed in a pop-up window when received.

**Tracking #** The tracking # for this shipment (user-defined).

**Transfer #** The transfer # for this shipment (system generated). After initiating a transfer, all subsequent items will be assigned this same # until you click **Close Transfer & Send**.

Format: TR (Transfer) or RQ (Request) \_ Store # \_ Date \_ Sequential digit.

E.g. TR\_ST1\_4\_4\_2019\_1 is a transfer request initiated from store 01 on 4/4/2019 and 1 indicates it is the first transfer that day.

Transfer

Click this button to transfer the currently entered or selected item(s).

Close Transfer & Send

Click this button to close the current transfer shipment. This will increment the **Transfer #**. If notifications are enabled, this will also trigger the email to be sent.

The bottom of this form is divided into two tabs: **Requested Items** and **Items**.

**Requested Items** show all items requested from your store. The number in parenthesis indicates the number of unfulfilled requests. To fulfill the request and transfer the item to the requestor, check it and click the **Transfer** button. To deny the request, visit the **Open** tab, select the item, and click the **Cancel Transfer** button.

Requested Items (5)		Items								
										Recent Request # <input type="text"/>
<input type="checkbox"/>	Item #	Not	Qty Requested	UOM Requested	Requesting Store	Location	Vendor / Style	Request Date	Transfer #	Description
<input type="checkbox"/>	001-210-1000003		1	0	2	Case 1	DEC / ER2323EM	4/4/2019 10:33:45 AM	RQ_ST2_4_4_2019_2	14KY Ladies Em Stone Earrings

Fields on the **Requested Items** tab include:

- Recent Request #** This drop-down will show open requests. Selecting an open request will filter the item list to only display items from that request.
- Item #** The item # of the requested item.
- Note** If there is a note on this request a green note icon will be displayed. Hover over the icon to review the note text.
- Qty Requested** The quantity requested.
- UOM Requested** For bulk, the measure requested.
- Requesting Store** The store the request originated.
- Location** The case location of the requested item.
- Vendor / Style** The vendor & vendor style of the requested item.
- Request Date** The date the request was submitted.
- Transfer #** The transfer # this requested item is assigned to.
- Description** The description of the requested item.

The **Items** tab allows you to search inventory for items that you want to transfer.

Requested Items (5)		Items									
<input type="text" value="Find Items"/> <input type="text" value="Clear"/>											Recent Invoice # <input type="text"/>
<input type="checkbox"/>	Item #	Retail	Cost	Vendor	Vendor Style	Date Entered	Invoice	Description			
<input type="checkbox"/>	002-100-1000001	\$1,500.00	\$500.00	DEC	NewItem123	3/29/2019 2:20:41 PM	123	descr			

Fields and buttons include:

- Click this button to use the **Item Find** filter to search for inventory. Items matching your criteria will be displayed allowing you to check those you wish to transfer.
- Click this button to clear the item list.
- Recent Invoice #** This drop-down will show you recently entered invoices. Selecting an invoice will show all items entered on that invoice. The system option 'Number of Days to Load Invoices' controls how many days back it goes.

**Item #** The item #.

**Retail** The retail price of the item.

**Cost** The cost of the item.

**Vendor** The vendor for this item.

**Vendor Style** The vendor's style # for this item.

**Date Entered** The date this item was entered.

**Invoice** The invoice this item was entered on.

**Description** The description of this item.

## Receive Tab

This tab opens a form showing all items transferred to your store that have not yet been received.

Receive Items		Location	Case 1		Transfer #							
<input type="checkbox"/>	Note	Date	Via	Tracking #	Qty	Item #	Vendor Style	Ship From	Transfer #	Description		
<input checked="" type="checkbox"/>		4/4/2019 10:35:17 AM	Federal Expres	SE-522214	1	001-200-1000003	LR12413PTW	Store #2	TR_ST2_4_4_2019_1	14KW Ladies Pink Tourmaline Colored Stone ring with .23CT Dia		
<input type="checkbox"/>		4/4/2019 10:35:17 AM	Federal Expres	SE-522214	1	001-210-1000004	ER1212BTW	Store #2	TR_ST2_4_4_2019_1	14KW Blue Topaz Ladies Colored Stone Earrings		
<input type="checkbox"/>		4/4/2019 10:35:17 AM	Federal Expres	SE-522214	1	001-210-1000005	ER1212BTW	Store #2	TR_ST2_4_4_2019_1	14KW Blue Topaz Ladies Colored Stone Earrings		

Fields and buttons include:

Receive Items

Click this to receive the currently checked items.

**Location** Use this drop-down to select a case location to receive items into. The system option 'Receive Items Requires Location' can be used to make this required.

**Transfer #** This drop-down will show open transfers waiting to be received. Selecting an open transfer will filter the list to only display items on that transfer.

**Note** If there is a note on this transfer a green note icon will be displayed. Hover over the icon to review the note text.

**Date** The date the item was originally transferred.

**Via** The shipping method for this item.

**Tracking #** The tracking number for this item.

**Qty** The quantity of item transferred.

**Item #** The item #.

**Vendor Style** The item's vendor style.

**Ship From** The store where the item was transferred from.

**Transfer #** The transfer # this item is assigned to.

**Description** The description of this item.

## Request Tab

This tab allows you to request items for transfer from other stores. Note that items can also be requested from the **Reorder Form, Levels**, and the **Item Record**. See the **Requesting an Item** section for more information.

The screenshot shows the Request Tab interface. At the top, there is a form with an 'Item #' input field, a '\*Ship To' dropdown menu set to 'Store #2', and a 'Notes' checkbox labeled 'Pop-Up Notes'. Below this is a 'Request' button and a 'Transfer #' field containing 'RQ\_ST1\_4\_4\_2019\_2'. A 'Close Request & Send' button is also present. On the left side, there is a vertical navigation menu with icons for Transfer (4), Receive (3), Request, Open (8), and Print. Below the form is a table with the following columns: Item #, Retail, Cost, Vendor, Vendor Style, Date Entered, Invoice, and Description. The table contains five rows of item data.

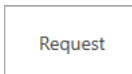
Item #	Retail	Cost	Vendor	Vendor Style	Date Entered	Invoice	Description
001-200-1000002	\$905.00	\$275.00	DEC	LR2323EM	12/12/2018	DEC121218	14KY Emerald Ladies Colored Stone Ring
001-200-1000003	\$1,575.00	\$750.00	DEC	LR12413PTW	12/12/2018	DEC121218	14KW Ladies Pink Tourmaline Colored Stone ring with .23CT Dia
001-205-1000002	\$900.00	\$300.00	DEC	CL4EM	12/12/2018	DEC121218	14KY Mens Claddagh Ring with 4MM Round Emerald
001-205-1000003	\$900.00	\$300.00	DEC	CL4EM	3/29/2019	123	14KY Mens Claddagh Ring with 4MM Round Emerald
001-210-1000001	\$290.00	\$95.00	DEC	ER1212BTW	12/12/2018	DEC121218	14KW Blue Topaz Ladies Colored Stone Earrings

Fields and buttons include:

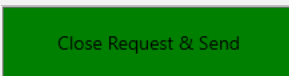
**Item #** Manually key in an item to request it. You must specify **Ship To**.

**Ship To** The store being shipped to.

**Notes** Notes to accompany this requested item. Check the **Pop-up Notes** box if you want the note displayed in a pop-up window when viewed.



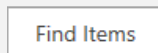
Click this button to request the currently entered or selected item(s).



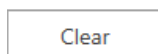
Click this button to close the current request shipment. This will increment the **Transfer #**. If notifications are enabled, this will also trigger the email to be sent.

**Transfer #** The transfer # for this shipment (system generated). After initiating a request, all subsequent items will be assigned this same # until you click **Close Request & Send**.

Format: TR (Transfer) or RQ (Request) \_ Store # \_ Date \_ Sequential digit.  
E.g. RQ\_ST1\_4\_4\_2019\_1 is a request initiated from store 01 on 4/4/2019 and 1 indicates it is the first transfer that day.



Click this button to use the **Item Find** filter to search for inventory. Items matching your criteria will be displayed allowing you to check those you wish to request.



Click this button to clear the item list.

**Item #** The item #.

**Retail** The retail price of the item.


<b>Cost</b>	The cost of the item.
<b>Vendor</b>	The vendor for this item.
<b>Vendor Style</b>	The vendor's style # for this item.
<b>Date Entered</b>	The date this item was entered.
<b>Invoice</b>	The invoice this item was entered on.
<b>Description</b>	The description of this item.

## Open Tab

This tab shows all currently open transfers. This form can be used to cancel transferred items.

Note	Type	Item #	Qty	UOM	Ship To	Ship From	Ship Date	Via	Tracking #	Transfer #	Description
	Transfer	001-200-1000003	1		1	2	4/4/2019 10:32	Federal Express	SE-522214	TR_ST2_4_4_2019_1	14KW Ladies Pink Tourmaline Colored Stone ring with .23CT Dia
	Transfer	001-210-1000004	1		1	2	4/4/2019 10:32	Federal Express	SE-522214	TR_ST2_4_4_2019_1	14KW Blue Topaz Ladies Colored Stone Earrings
	Transfer	001-210-1000005	1		1	2	4/4/2019 10:32	Federal Express	SE-522214	TR_ST2_4_4_2019_1	14KW Blue Topaz Ladies Colored Stone Earrings
	Request	001-210-1000003	1		2	1	4/4/2019 10:33			RQ_ST2_4_4_2019_1	14KY Ladies Emerald Colored Stone Earrings
	Request	001-210-1000006	1		2	1	4/4/2019 10:33			RQ_ST2_4_4_2019_1	14KY Ladies Emerald Colored Stone Pendant
	Request	001-210-1000008	1		2	1	4/4/2019 10:34			RQ_ST2_4_4_2019_1	14KY Ladies Emerald Colored Stone Pendant
	Request	001-210-1000007	1		2	1	4/4/2019 10:34			RQ_ST2_4_4_2019_1	14KY Ladies Emerald Colored Stone Pendant
	Transfer	002-100-1000001	1		2	1	4/4/2019 10:05	Federal Express	123	TR_ST1_4_4_2019_1	descr
	Request	001-200-1000003	1		2	1	4/5/2019 9:41:3			RQ_ST1_4_4_2019_1	14KW Ladies Pink Tourmaline Colored Stone ring with .23CT Dia

Fields and buttons include:

<b>Show All Stores</b>	By default, only transfers to or from your store are displayed. Check this to see all stores. Requires 'Transfer Items from Stores other than your current store' permission.
	Cancel the selected item transfer or request.
<b>Note</b>	If there is a note on this transfer a green note icon will be displayed. Hover over the icon to review the note text.
<b>Type</b>	Specifies whether this is a transfer or request.
<b>Item #</b>	The item #.
<b>Qty</b>	The quantity of item transferred or requested.
<b>UOM</b>	For bulk, the measure of item transferred or requested.
<b>Ship To</b>	The destination store for this transfer or request.
<b>Ship From</b>	The originating store for this transfer or request.
<b>Ship Date</b>	The date the item was shipped.
<b>Via</b>	The method of shipping.
<b>Tracking #</b>	The tracking # for this item.

**Transfer #** The transfer # this item is assigned to.

**Description** The description of this item.

## Print Tab

This tab is used to print transfers. Each printed transfer will show shipping information as well as a list of all included items.

The screenshot shows the Print Tab interface. On the left is a vertical navigation menu with icons for Transfer (5), Receive (3), Request, Open (9), and Print. The main area contains search filters: Transfer #, Store To, Search From (4/4/2019), and Store From. Below the filters are 'Find' and 'Print' buttons. A table displays the results of the search.

Type	Transfer #	Ship Date	Ship To	Ship From
<input checked="" type="checkbox"/> Transfer	TR_ST2_4_4_2019_1	4/4/2019 10:32:44 AM	1	2
<input type="checkbox"/> Request	RQ_ST2_4_4_2019_2	4/4/2019 10:33:45 AM	2	1
<input type="checkbox"/> Request	RQ_ST2_4_4_2019_3	4/4/2019 10:33:53 AM	2	1
<input type="checkbox"/> Request	RQ_ST2_4_4_2019_4	4/4/2019 10:34:10 AM	2	1
<input type="checkbox"/> Request	RQ_ST2_4_4_2019_5	4/4/2019 10:34:17 AM	2	1
<input type="checkbox"/> Transfer	TR_ST1_4_4_2019_1	4/4/2019 10:05:31 AM	2	1
<input type="checkbox"/> Request	RQ_ST1_4_4_2019_2	4/5/2019 9:41:39 AM	2	1

Fields and buttons include:

**Transfer #** Enter a transfer # and click **Find** to search for it.

**Store To** Choose a store # to filter **Find** results by store being shipped to.

**Search From** Choose a date to filter **Find** results by shipped date.

**Store From** Choose a store # to filter **Find** results by store being shipped from.

Find

After entering criteria, click this button to find matching transfers.

Print

After selecting a transfer, click this button to open the print preview.

**Type** Specifies whether this is a transfer or request.

**Transfer #** The transfer #.

**Ship Date** The date this transfer was shipped.

**Ship To** The destination store for this transfer or request.

**Ship From** The originating store for this transfer or request.



## Transfer History

Transfer history keeps a running log of all transfer activity during this session. Closing the Transfer Screen will end the session and clear the log.

Transfer History (7) Print History

Item #	Note	Type	Qty	UOM	Ship To	Ship From	Ship Date	Via	Tracking	Transfer #	Message
001-200-1000003		Request	1	0	2	1	4/5/2019 9:41:39			RQ_ST1_4_4_2019_2	Item Requested At:
001-210-1000001		Cancel	1		2	1	4/4/2019 10:13:23			RQ_ST2_4_4_2019_1	Request Canceled a
001-100-1000001		Transfer	1		2	1	4/4/2019 10:05:31	Federal Express:	123	TR_ST1_4_4_2019_1	Transferred Item(s) t
001-850-2000002		Cancel	2		1	2	4/4/2019 11:11:18			RQ_ST1_4_4_2019_1	Request Canceled a
001-850-2000002		Request	2	0	1	2	4/4/2019 11:11:18			RQ_ST1_4_4_2019_1	Item Requested At:
001-200-1000002		Receive	1	0	1	Store #2	4/4/2019 10:32:44	Federal Express:	SE-522214	TR_ST2_4_4_2019_1	Item Received At: 4
001-100-1000001		Receive	1	0	1	Store #2	4/4/2019 10:32:44	Federal Express:	SF-522214	TR ST2_4_4_2019_1	Item Received At: 4

Fields and buttons include:



Click this button to hide or reveal the history log. This can be useful if you require more working area in the top of the form.

Print History

Click this button to print out the current history.

**Item #** The item #.

**Note** If there is a note on this transfer a green note icon will be displayed. Hover over the icon to review the note text.

**Type** Specifies whether this is a transfer or request.

**Qty** The quantity of item transferred or requested.

**UOM** For bulk, the measure of item transferred or requested.

**Ship To** The destination store for this transfer or request.

**Ship From** The originating store for this transfer or request.

**Ship Date** The date the item was shipped.

**Via** The method of shipping.

**Tracking #** The tracking # for this item.

**Transfer #** The transfer # this item is assigned to.

**Message** Describes the action taken on this transfer.

## Other Options

The bottom of the Transfer Screen includes other options and buttons that apply universally to all tabs.

Refresh Transfers  Show Images

In-Transit

Close

Refresh Transfers

Refreshes entire Transfer Screen form. Note that the screens automatically refresh every five minutes.

Show Images

Check this to show images in the transfer grids.

In-Transit

Click this to view the In-Transit report.

Close

Click this to close the form.

## How To

### Transfer an Item

To transfer an item:

1. Click **Inventory > Inter-Store > Transfers**. The **Transfer Screen** will open.
2. If you are not already on the **Transfer** tab, click on it on the left.
3. Specify the store to **Ship To**, optionally enter other shipping info or notes, then either:
  - a. Scan the item.
  - b. Manually key in the item and press enter or click **Transfer** button.
  - c. Use the **Items** tab to find and select one or more items, then click the **Transfer** button.
4. Repeat for all items to be included with this shipment.
5. Click **Close Transfer & Send** to complete this shipment.

### Receive an Item

To receive an item that was transferred to you store:

1. Click **Inventory > Inter-Store > Transfers**. The **Transfer Screen** will open.
2. On the left, click on the **Receive** tab. A list of items shipped to your store will be displayed. Optionally, use the **Transfer #** drop-down to filter by a specific shipment #.
3. Optionally, specify case location to receive items into. The system option 'Receive Items Requires Location' can be used to make this required.
4. Check one or more items, then click the **Receive Items** button. Alternatively, you can scan the item barcodes.

### Request an Item

There are four ways to request items from other stores.

#### From Transfer Screen

1. Click **Inventory > Inter-Store > Transfers**.
2. On the left, click on the **Request** tab.
3. Specify the store to **Ship To**. Optionally, enter notes, then either:
  - a. Manually key in the item and press enter or click the **Request** button.
  - b. Use the **Find Items** button to find and select one or more items, then click the **Request** button.
4. Repeat for all items to be included with this request.
5. Click **Close Request & Send** to complete this request.

#### From Reorder Form

1. Run the **Reorder Form** either as part of **Weekly Buying Tools (Inventory > Buying Tools > Weekly Buying Plan)** or standalone (**Reports > Inventory > Ordering > Reorder Form**).
2. When running, you must change the **Display Rows** option to **Show One Style Per Store**.
3. Use the drop-down at the beginning of the row to expand the style row to show individual counts by store.

4. Check the store you wish to request from, then click **Request Items** button at the bottom.

### From Item Record

1. Click **Inventory > Items > Find** and enter criteria to search for the item.
2. **Edit** the item record.
3. Click the **Request** button (located in the Inventory section, middle of form). Note that this button will only be visible if the item is not already at your store.

### From Levels

1. Click **Inventory > Items > Levels** and enter criteria to search for styles.
2. Use the drop-down at the beginning of the row to expand the style row to show individual counts by store.
3. Click the **Request** button next to the store you wish to request from.

### Cancel a Transferred or Requested Item

To cancel a transferred or requested item:

1. Click **Inventory > Inter-Store > Transfers**.
2. On the left, click on the **Open** tab.
3. Select the item then click the **Cancel Transfer** button in the top right.

### Print a Transfer

To print a transfer:

1. Click **Inventory > Inter-Store > Transfers**.
2. On the left, click on the **Print** tab.
3. Use the fields at the top to specify criteria, then click **Find**. A list of matching transfers will be shown.
4. Select the transfer and click the **Print** button.

### Enable Email Notifications

Email notifications can be setup so that designated associates get automatically notified when a transfer or request is sent to their store. To use this feature, you must first setup email notifications. See the [Email Setup webpage](#) for instructions on doing so (varies by email provider).

To enable notifications for an associate:

1. First, verify the **Transfer Email** option is set to **True** (Administrative > System Options, Transfer Options).
2. Click **Administrative > Associates** and **Edit** the associate record.
3. Under **Multi-Store Options** on the right, click the **Receive Transfer Notifications** drop-down.
4. Check one or more stores, then click **OK**.
5. Verify the associate has an **Email** on file, then **Save** your changes.
6. Save your changes.

## Reports

There are two transfer reports available.

### In Transit Report

This report will show all open transfers. To run:

1. Click **Inventory > Inter-Store > In Transit Report**.
2. There are no options to set; the report will automatically run and display all open transfers.

Items in Transit						
Item Number	Transfer #	Ship Date	Ship From	Via	Tracking	Item Description
<b>In Transit To Store: 1</b>						
001-200-1000003	TR_ST2_4_4_21	4/4/2019	Store: 2	Federal Express	SE-522214	14KW Ladies Pink Tourmaline Colored Stone ring with .23CT Dia
001-210-1000004	TR_ST2_4_4_21	4/4/2019	Store: 2	Federal Express	SE-522214	14KW Blue Topaz Ladies Colored Stone Earrings
001-210-1000005	TR_ST2_4_4_21	4/4/2019	Store: 2	Federal Express	SE-522214	14KW Blue Topaz Ladies Colored Stone Earrings

4/5/2019  
Page 1 of 1

Fields on this report include:

<b>Item Number</b>	The item #.
<b>Transfer #</b>	The transfer #.
<b>Ship Date</b>	The date this item was transferred.
<b>Ship From</b>	The originating store for this transferred item.
<b>Via</b>	The shipping method.
<b>Tracking</b>	The tracking #.
<b>Item Description</b>	The description of the item.

### Transfer Report

This report allows you to specify criteria and can be used to report on open, closed, and cancelled transfers. To run:

1. Click **Inventory > Inter-Store > Transfer Report**. The **Transfer Report** window will appear.

The screenshot shows the 'Transfer Report' dialog box. It includes the following fields and options:

- Store Transferred To: [Dropdown]
- Store Transferred From: [Dropdown]
- Ship Date: [All Dates]
- Receive Date: [All Dates]
- Item Filter: [Dropdown]
- Transfer Or Request:  Both  Transfers Only  Requests Only
- Open Transfers Only
- Include Cancelled
- Group By: [List of fields including Store To, Store From, Ship Date, Receive Date, Associate Shipped, Associate Received, Shipping Method, Tracking Number, Category, Vendor ID, Vendor Style]
- Page Breaks
- See Cost
- See Retail Price
- See Notes
- Use Report Criteria Cover Page
- Buttons: Presets, OK, Cancel

Fields and options include:

<b>Store Transferred To</b>	Allows you to select destination store
-----------------------------	--

<b>Store Transferred From</b>	Allows you to select originating store
<b>Ship Date</b>	Allows you to select by shipped date
<b>Receive Date</b>	Allows you to select by received date
<b>Item Filter</b>	Opens item filter allowing you to set specific item criteria to search for
<b>Transfer or Request</b>	Choose whether to display transfers, requests, or both
<b>Open Transfers Only</b>	Check this to only include open transfers
<b>Include Canceled</b>	Check to also include canceled transfers
<b>Group By</b>	Check options to group by them. Drag & drop items to the top of the list to sort by them.
<b>Page Breaks</b>	Check to include page breaks.
<b>See Cost</b>	Check to include cost.
<b>See Retail Price</b>	Check to include retail price.
<b>See Notes</b>	Check to include notes.
<b>Use Report Criteria Page</b>	Check to include the report criteria page

2. Set desired criteria and click **OK**.
3. The resulting report will show each transferred item meeting your criteria.

**Transfer Report**

4/5/2019  
Page 3 of 4

Vendor Style #	Description	TransferType	From Store	Assoc Shipped	Date Shipped	Shipping Service		Tracking
Item #		Ref #	To Store	Assoc Rec / Cancel	Date Rec / Cancel	Qty	UOM	
DEC:LR2323EM 001-200-1000002	14KY Emerald Ladies Colored Stone Ring	Transfer TR_ST2_4_4_2019_1	2 1	#1: Mastrl, Dominick #1: Mastrl, Dominick	4/4/2019 4/4/2019	Federal Express 1		SE-622214
DEC:LR12413PTW 001-200-1000003	14KW Ladies Pink Tourmaline Colored Stone ring with 23CT Dia	Transfer TR_ST2_4_4_2019_1	2 1	#1: Mastrl, Dominick #1: Mastrl, Dominick	4/4/2019	Federal Express 1		SE-622214
DEC:ER1212BTW 001-210-1000004	14KW Blue Topaz Ladies Colored Stone Earrings	Transfer TR_ST2_4_4_2019_1	2 1	#1: Mastrl, Dominick	4/4/2019	Federal Express 1		SE-622214
DEC:ER1212BTW 001-210-1000005	14KW Blue Topaz Ladies Colored Stone Earrings	Transfer TR_ST2_4_4_2019_1	2 1	#1: Mastrl, Dominick	4/4/2019	Federal Express 1		SE-622214

<b>Vendor Style</b>	The item's vendor style number.
<b>Item #</b>	The item #.
<b>Description</b>	The description of the item.
<b>Transfer Type</b>	Whether this is a transfer or request.
<b>Ref #</b>	The transfer #.
<b>From Store</b>	The originating store.
<b>To Store</b>	The destination store.
<b>Assoc Shipped</b>	The associate that transferred the item.
<b>Assoc Rec/Cancel</b>	The associate that received or canceled the transfer.
<b>Date Shipped</b>	The date the transfer was shipped.
<b>Date Rec/Cancel</b>	The date the transfer was received or canceled.
<b>Shipping Service</b>	The shipping type.
<b>Qty / UOM</b>	For bulk, the shipped quantity.
<b>Tracking</b>	The shipping tracking #.

## Settings and Security

### System Options

To view the **Transfer** system options, click **Administrative > System Options** and scroll down to the **Transfer Options** section.

<b>Number of Days to Load Invoices</b>	Defines how many days back to load invoices into the Invoice drop-down in the Transfer screen; default is 7 which will load invoices from the last 7 days.
<b>Receive Items Requires Location</b>	Set to True to require a case location when receiving transferred items.
<b>Transfer Emails</b>	Set to True to enable transfer notification emails.

### Permissions

To view associate permissions, click **Administrative > Associates** and **Edit** the associate record. The following permissions pertain to transfers:

<b>Ship Items Inter-Store</b>	Allows you to ship items from your store to other stores
<b>Receive Items Inter-Store</b>	Allows you to receive items shipped to your store
<b>Request an Item to be transferred from another store</b>	Allows you to request items from other stores
<b>Transfer Items from Stores other than your current store</b>	Allows you to transfer items between any stores, not just your own
<b>Cancel a Transfer or Request</b>	Allows you to cancel a transfer or request
<b>Run Transfer Report</b>	Allows you to run the transfer report