Item Transfers

SIMMS Inventory Management Software 2012

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Item Transfers

An item transfer is the physical movement of a stock item from one location to another.

There are multiple reasons why you may want to move an item from one location to another. Such as, you may need to stage items for a kit build, or provide stock to another location to complete a sale.

Recording your transfers enables you to maintain accurate records of where your stock items are located as you move them throughout your warehouse or between warehouses.

Transferring an Item

You enter item transfers in the Transfers window. This window is divided into three panes:

- **Header**
  Where you enter your basic document information and the initial and final location for your transfer. In addition, you can link your transfer to a kit project and its stage.

- **Bill/Ship To Address**
  Where you enter the bill-to and ship-to address for your transfer.

- **Details**
  Where you enter in the details for the item you want to transfer.

Enter the Header Information

1. Open the **Warehouse menu**, open the **Inventory** submenu, and then click **Item Transfer Manager**.

2. Click the **New** icon.

3. In the **Document Number** text box, type a document number.

4. Under **Default Locations**, in the **Initial Location** list, select the location your item is originating from.

5. In the **Final Location** list, select the location your item is going to.

6. To link a transfer to a project in the Project Manager, do the following steps:
Under **Link to Kit Project**, in the **Project** list, select your project. In the **Stage** list, select the project’s stage you want to link this transfer to.

7. In the **Comments** text box, type a comment.

   This comment appears on your transfer document.

**Select the Bill/Ship-To Address**

1. Expand the **Bill/Ship To Address** pane, in the **Bill To** list, select the bill-to address.

2. In the **Ship To** list, select the ship-to address.

**Select the Item to Transfer**

1. In the **Details** pane, click in the **Description** field, and then click the **Search** icon that appears.

   The Enhanced Search dialog box opens.

2. In the **Description** text box, type the description for your item, and then click **Find**.

3. Select your item, and then click **Retrieve One**.

   Your item's details are entered in the Transfer window’s grid.

**Edit an Items Details**

If required, edit your items details such as its transfer quantity or final location. See Table 1: Edit an Item’s Details.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>UM</strong></td>
<td>In this field SIMMS enters your items standard unit of measure. You can choose any of the available units of measure defined for your item.</td>
</tr>
<tr>
<td><strong>Initial Location</strong></td>
<td>In this field SIMMS enters your item’s default initial location. You chose your item’s default initial location in the Header pane. You can change your item’s initial location.</td>
</tr>
</tbody>
</table>
4. If any of the items on your transfer are serialized, assign them their serial numbers. Otherwise, click the Save icon.

### Assign a Serial Number to an Item

1. In the Transfer window, click the Serial Number icon.
   
   The Serial Number Manager window opens.

2. Do one of the following steps:
   
   - To assign a serial number to an item when the item’s serial number has already been entered into SIMMS, in the Select column, click the check box for the serial number you want to assign to your item.

   - To assign a serial number to an item when the item’s serial number has never been entered into SIMMS, click the Insert link (bottom left). SIMMS adds a row for you to enter your item’s serial number. In the Serial Number column, type the item’s serial number.
3. Click the **Save Serial Numbers** link, and close the **Serial Number Manager**.

4. Return to the **Transfer** window and click the **Save** icon.

## Working with Transfer Documents

### Open a Transfer

1. Open the **Warehouse menu**, open the **Inventory** submenu, and then click **Item Transfer Manager**.

2. Select the transfer you want to view, and then click the **View** icon.

### Print a Transfer

1. Open the **Warehouse menu**, open the **Inventory** submenu, and then click **Item Transfer Manager**.

2. Select the transfer you want to print, and then click the **Print** icon.

### Delete a Transfer

1. Open the **Warehouse menu**, open the **Inventory** submenu, and then click **Item Transfer Manager**.

2. Select the transfer you want to delete. Click the **File** menu, and then click **Delete**.

## Confirming Transfers Manually

By default, SIMMS confirms transfers automatically. This means that as soon as you save your transfer SIMMS shows the items on the transfer as being on-hand in their final location.

You can confirm your transfers manually. When you save a transfer the items on the transfer no longer appear as *on-hand* in their original location. Rather, they appear in their final location as *in transfer*. You need to manually confirm your item is in its final location before SIMMS changes its status to on-hand in that location.

Before you can manually confirm transfers you need to clear the Use Auto-Receive for Receipts and Transfers check box in Global Settings.

## Change Global Settings to Perform Manual Transfers

1. Open the **Setup** menu, click **Global Settings**, and then click the **Purchase** tab.
2. Clear the **Use Auto-Receive for Receipts and Transfers** check box, and then click **Save**.

**Manually Confirm a Transfer**

1. Open the **Warehouse** menu, Open the **Inventory** submenu, and then click **Item Transfer Manager**.

2. Click the **Transfer Confirmation** icon.

3. In the **Received** column, click the check box for the transfer you are confirming you have received.

4. Click **Save**.

**Backordered Items from a Transfer**

If there is insufficient stock for a transfer, you can backorder the items on the transfer and then complete the transfer when your stock item is replenished.

You can create a purchase order from the Backorder Manager to replenish your depleted stock item. Once you purchase the item you can complete your transfer from the Backorder Manager.

**Create a Purchase Order**

You cannot create in the Backorder Manager a purchase order for an item if the item is already on a purchase order. This prevents you from creating multiple purchase orders for the same item.

1. Open the **Warehouse** menu, click **Inventory**, and then click **Item Transfer Manager**.

2. Click the **Backorder Manager** icon.

3. Click **Preview**.

4. In the **Select for PO** column, click the check box for the items you want to purchase and then click **Create PO**.

The Reordering Purchase Order window opens.
5. In the **Qty** field, type the quantity of the item you want to purchase.

6. In the **Document Number** text box, type a document number.

7. Do one of the following steps:
   - To purchase all the items from a single vendor, in the **Vendor** list, select the vendor you want to purchase your items from and then click **Create POs**.
   - To purchase your items from multiple vendors, click **Create POs to Default Vendors**.

   To purchase your items from multiple vendors, each item must have a default vendor. An item’s default vendor is entered as part of the item’s profile in the Item Manager.

**Complete the Transfer of a Backordered Item**

After replenishing your stock, you can complete your transfer.

1. Open the **Warehouse** menu, click **Inventory**, and then click **Item Transfer Manager**.

2. Click the **Backorder Manager** icon.

3. Click **Preview**, and then click **Create Transfer**.

   The Transfer window opens.

   SIMMS enters the details of your transfer in the Transfer window’s grid.

4. Click the **Edit** icon, edit and complete your transfer.

   You can remove items on the transfer, change the transfer quantity, initial location, and final location.

   If your items on the transfer are serialized you assign them their serial numbers.

5. Click the **Save** icon.

**Transfer Reports**

The Transfer History report is available from the Transfer Manager. This report lists the items that were transferred during the last 30, 90, and 180 days. The report is organized by locations.

You can view all reports related to transfers from the report center.
View the Transfer History Report

1. Open the Warehouse menu, click Inventory, and then click Item Transfer Manager.

2. Click the Transfers History Report icon.