

# How to Transfer item from one location to another location

The following will guide you on how to transfer item from one location to another. In this illustration also, non-lot tracked item is selected for item to be shipped.

- 1. There are 2 ways where you can create a new Inventory Transfer.
  - a. From Inventory module > click on **Inventory Transfer** menu. The **Inventory Transfer search** will be shown. Click **New**.

From Storage Location	From Storage Unit	Lot Number	Available Qty	Transfer Qty	To Storage Location	To Storage Unit
Raw Station	RM Bin 1		999.9 Bushels	100 Bushels	Indy	Indy Storage

If there are no existing records yet, upon clicking Inventory Transfer menu, it will open a new Inventory Transfer screen.

- b. From an existing Inventory Transfer transaction, click **New**.
- 2. The **Inventory Transfer search** will be shown. Click **New**.

Transfer No	Transfer Date	Transfer Type	Description	From Location	To Location	Status	Posted
IT-415	06/07/2018	Location to Location		0001-Fort Wayne	0002 - Indianapolis	Open	
IT-414	07/10/2018	Location to Location	CORN	0001-Fort Wayne	0002 - Indianapolis	In Transit	✓
IT-413	06/18/2018	Location to Location	CORN	0001-Fort Wayne	0002 - Indianapolis	In Transit	✓
IT-412	06/18/2018	Location to Location	CORN	0001-Fort Wayne	0002 - Indianapolis	In Transit	✓
IT-411	06/13/2018	Storage to Storage		0001-Fort Wayne	0001-Fort Wayne	Closed	✓
IT-410	06/13/2018	Storage to Storage		0001-Fort Wayne	0001-Fort Wayne	Closed	✓
IT-409	06/13/2018	Storage to Storage		0001-Fort Wayne	0001-Fort Wayne	Closed	✓
IT-408	06/13/2018	Storage to Storage		0001-Fort Wayne	0001-Fort Wayne	Closed	✓
IT-407	06/13/2018	Storage to Storage		0001-Fort Wayne	0001-Fort Wayne	Closed	✓
IT-406	06/13/2018	Storage to Storage		0001-Fort Wayne	0001-Fort Wayne	Closed	✓
IT-405	06/13/2018	Storage to Storage		0001-Fort Wayne	0001-Fort Wayne	Closed	✓
IT-404	06/13/2018	Storage to Storage		0001-Fort Wayne	0001-Fort Wayne	Closed	✓
IT-403	06/13/2018	Storage to Storage		0001-Fort Wayne	0001-Fort Wayne	Closed	✓
IT-402	06/12/2018	Storage to Storage		0001-Fort Wayne	0001-Fort Wayne	Closed	✓

- 3. This will open a new **Inventory Transfer** screen.

Item No.	Description	Ownership Type	From Storage Location	From Storage Unit	Lot Number	Available Qty
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4. In the **From Location** select the location where the item will be coming from.

The screenshot shows the 'Inventory Transfer' form. The 'From Location' dropdown menu is open, showing '0001-Fort Wayne' as the selected option. The 'To Location' dropdown menu is also open, showing '0001-Fort Wayne' as the selected option. The 'Status' dropdown menu is open, showing 'Open' as the selected option. The 'Shipment Required' checkbox is unchecked. The 'Description' field is empty. The 'Items' table is empty, showing a total of 0 available quantity.

Item No.	Description	Ownership Type	From Storage Location	From Storage Unit	Lot Number	Available Qty
						0

5. In the **To Location** field select another location where the item will be transferred to.

The screenshot shows the 'Inventory Transfer' form. The 'From Location' dropdown menu is open, showing '0001-Fort Wayne' as the selected option. The 'To Location' dropdown menu is open, showing '0002 - Indianapolis' as the selected option. The 'Status' dropdown menu is open, showing 'Open' as the selected option. The 'Shipment Required' checkbox is unchecked. The 'Description' field is empty. The 'Items' table is empty, showing a total of 0 available quantity.

Item No.	Description	Ownership Type	From Storage Location	From Storage Unit	Lot Number	Available Qty
						0

6. In the Item grid,  
a. Select item to transfer in the Item No field.

The screenshot shows the 'Inventory Transfer' form. The 'From Location' dropdown menu is open, showing '0001-Fort Wayne' as the selected option. The 'To Location' dropdown menu is open, showing '0002 - Indianapolis' as the selected option. The 'Status' dropdown menu is open, showing 'Open' as the selected option. The 'Shipment Required' checkbox is unchecked. The 'Description' field is empty. The 'Items' table is populated with one item, 'CORN', which is selected. The 'Item No.' field is highlighted, showing 'CORN'.

Item No.	Description	Ownership Type	From Storage Location	From Storage Unit	Lot Number	Available Qty
CORN	CORN	Own				1,687,157 Bushels

- b. In the **From Storage Location** field select the sub location where the item will be coming from if it applies, else leave it blank.

Inventory Transfer -

New Save Search Delete Undo Print Post Close

Details Activities Attachments Post Preview Post History Audit Log

Transfer No: Created on Save From Location: 0001-Fort Wayne

Transfer Date: 12/26/2018 To Location: 0002 - Indianapolis

Source Type: None Status: Open

Transferred By: IRELY ADMIN Shipment Required: ☐

Description:

Items

Item No.	Description	Ownership Type	From Storage Location	From Storage Unit	Lot Number	Available Qty
CORN	CORN	Own	Raw Station	RM Storage		1,982.14 Bushels

- c. In the **From Storage Unit** field select the storage where the item will be coming from, if it applies, else leave it blank.

Inventory Transfer -

New Save Search Delete Undo Print Post Close

Details Activities Attachments Post Preview Post History Audit Log

Transfer No: Created on Save From Location: 0001-Fort Wayne

Transfer Date: 12/26/2018 To Location: 0002 - Indianapolis

Source Type: None Status: Open

Transferred By: IRELY ADMIN Shipment Required: ☐

Description:

Items

No.	Description	Ownership Type	From Storage Location	From Storage Unit	Lot Number	Available Qty	Transfer Q
CORN	CORN	Own	Raw Station	RM Bin 1		999.9 Bushels	0 Bu

- d. In the **To Storage Location** field select the sub location where the item will be transferred to if it applies, else leave it blank.

Inventory Transfer -

New Save Search Delete Undo Print Post Close

Details Activities Attachments Post Preview Post History Audit Log

Transfer No: Created on Save From Location: 0001-Fort Wayne

Transfer Date: 12/26/2018 To Location: 0002 - Indianapolis

Source Type: None Status: Open

Transferred By: IRELY ADMIN Shipment Required: ☐

Description:

Items

Number	Available Qty	Transfer Qty	To Storage Location	To Storage Unit	New Lot Number	Cost	Gross/Net UOM	Gross
999.9 Bushels	0 Bushels		Indy			26.9153...		0

- e. In the **To Storage Unit** field select the storage where the item will be transferred to, if it applies, else leave it blank.

The screenshot shows the 'Inventory Transfer -' window. The 'Details' tab is active. The 'Transfer No' is 'Created on Save', 'From Location' is '0001-Fort Wayne', 'To Location' is '0002 - Indianapolis', 'Source Type' is 'None', 'Status' is 'Open', 'Transferred By' is 'IRELY ADMIN', and 'Shipment Required' is unchecked. The 'Items' table has one row with 'Raw Station' as the 'From Storage Location', 'RM Bin 1' as the 'From Storage Unit', '999.9 Bushels' as 'Available Qty', and 'Indy Storage' as the 'To Storage Unit' (highlighted with a red box). The 'Transfer Qty' is '0 Bushels' and the 'Lot Number' is 'Indy'.

- f. Enter quantity of items to be transferred in the **Transfer Qty** field.  
g. In the **UOM** field select Unit of Measure for the item to be transferred.

The screenshot shows the 'Inventory Transfer -' window. The 'Details' tab is active. The 'Transfer No' is 'Created on Save', 'From Location' is '0001-Fort Wayne', 'To Location' is '0002 - Indianapolis', 'Source Type' is 'None', 'Status' is 'Open', 'Transferred By' is 'IRELY ADMIN', and 'Shipment Required' is unchecked. The 'Items' table has one row with 'Raw Station' as the 'From Storage Location', 'RM Bin 1' as the 'From Storage Unit', '999.9 Bushels' as 'Available Qty', '100 Bushels' as the 'Transfer Qty' (highlighted with a red box), and 'Indy' as the 'Lot Number'. The 'To Storage Location' is 'Indy Storage'.

7. Enter other relevant item information. See Inventory Transfer - Field Description.  
8. Save the record and post it later or you may directly post this transaction.

- a. Save the record. You can click **Save** or use the shortcut key **Ctrl+S**. In case you miss to save it and you click the **Close** or the **x** button at the top right corner of the screen or use the shortcut key **Alt+X** or **Esc**, i21 will prompt you if you would like to save it before closing the screen.

The screenshot shows the 'Inventory Transfer - IT-416' window. The 'Details' tab is active. The 'Transfer No' is 'IT-416', 'From Location' is '0001-Fort Wayne', 'To Location' is '0002 - Indianapolis', 'Source Type' is 'None', 'Status' is 'Open', 'Transferred By' is 'IRELY ADMIN', and 'Shipment Required' is unchecked. The 'Items' table has one row with 'Raw Station' as the 'From Storage Location', 'RM Bin 1' as the 'From Storage Unit', '999.9 Bushels' as 'Available Qty', '100 Bushels' as 'Transfer Qty', and 'Indy' as the 'Lot Number'. The 'To Storage Location' is 'Indy Storage'. The 'Save' button is highlighted with a red box.

b. Post Inventory Shipment. See How to Post Inventory Transfer.

Inventory Transfer - IT-416

NewSaveSearchDeleteUndoPrintUnpostClose

Details

Activities

Attachments

Unpost Preview

Post History

Audit Log

Transfer No

IT-416

From Location

0001-Fort Wayne

Transfer Date

12/26/2018

To Location

0002 - Indianapolis

Source Type

None

Status

Closed

Transferred By

IRELY ADMIN

Shipment Required

☐

Description

Items

ExportViewFilter (F3)

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From Storage Location	From Storage Unit	Lot Number	Available Qty	Transfer Qty	To Storage Location	To Storage Unit	Ni
Raw Station	RM Bin 1		999.9 Bushels	100 Bushels	Indy	Indy Storage	
			0	0			

0.21sPosted

1 of 1Refresh