

# How to transfer item from one sub location/storage location to another sub location/storage 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	08/07/2018	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.

The screenshot shows the 'Inventory Transfer' window with the 'Details' tab selected. The 'From Location' dropdown is set to '0001-Fort Wayne' and the 'To Location' dropdown is also set to '0001-Fort Wayne'. The 'Transfer Date' is '12/26/2018', 'Source Type' is 'None', 'Status' is 'Open', and 'Transferred By' is 'IRELY ADMIN'. The 'Items' table at the bottom is empty, showing a total of 0 items.

4. In the **From Location** select the location where the item will be coming from.

This screenshot is identical to the previous one, but the 'From Location' dropdown menu is highlighted with a red rectangular box to indicate it is the field to be selected for the transfer.

5. In the **To Location** field,

- select another location if the sub location or storage location where the item will be transferred to is under another location. [How to Transfer item from one location to another location](#)
- select the same location as that of From Location if the sub location or storage location where the item will be transferred to is under the same location.

This screenshot is identical to the previous ones, but the 'To Location' dropdown menu is highlighted with a red rectangular box to indicate it is the field to be selected for the transfer.

6. In the Item grid,

a. Select item to transfer in the Item No field.

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 0001-Fort Wayne

Source Type None Status Open

Transferred By IRELY ADMIN Shipment Required ☐

Description

Items

+ Insert X Remove Export View Filter (F3)

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

0.37s Edited 1 of 1 Refresh

b. In the From Storage Location field select the storage location where the item will be coming from.

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 0001-Fort Wayne

Source Type None Status Open

Transferred By IRELY ADMIN Shipment Required ☐

Description

Items

+ Insert X Remove Export View Filter (F3)

Item No.*	Description	Ownership Type	From Storage Location	From Storage Unit	Lot Number	Available Qty
CORN	CORN	Own	FG Station	FG Storage		13,648.48894 Bushels
						0

0.37s Edited 1 of 1 Refresh

c. In the From Storage Unit field select the storage unit where the item will be coming from.

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 0001-Fort Wayne

Source Type None Status Open

Transferred By IRELY ADMIN Shipment Required ☐

Description

Items

+ Insert X Remove Export View Filter (F3)

Item No.*	Description	Ownership Type	From Storage Location	From Storage Unit	Lot Number	Available Qty
CORN	CORN	Own	FG Station	FG Bin 1		5,685.87074 Bushels
						0

0.37s Edited 1 of 1 Refresh

- d. In the **To Storage Location** field select the storage location where the item will be transferred to. If the transfer is from one storage to another storage within the same location, then select the same sub location as that of From Sub Location, else select another Sub Location.

The screenshot shows the 'Inventory Transfer -' window. The 'Details' tab is active. The 'Transfer No' is 'Created on Save'. The 'Transfer Date' is '12/26/2018'. The 'From Location' is '0001-Fort Wayne'. The 'To Location' is '0001-Fort Wayne'. The 'Source Type' is 'None'. The 'Status' is 'Open'. The 'Transferred By' is 'IRELY ADMIN'. The 'Shipment Required' checkbox is unchecked. The 'Description' field is empty. The 'Items' table has one row with the following data:

Lot Number	Available Qty	Transfer Qty*	To Storage Location	To Storage Unit	New Lot Number	Cost	Gross/Net UOM	Gros
5,685.87074 Bushels	0 Bushels	0 Bushels	Processing Plant			26.9153...	0	0

- e. In the **To Storage Unit** field select the storage unit where the item will be transferred to.

The screenshot shows the 'Inventory Transfer -' window. The 'Details' tab is active. The 'Transfer No' is 'Created on Save'. The 'Transfer Date' is '12/26/2018'. The 'From Location' is '0001-Fort Wayne'. The 'To Location' is '0001-Fort Wayne'. The 'Source Type' is 'None'. The 'Status' is 'Open'. The 'Transferred By' is 'IRELY ADMIN'. The 'Shipment Required' checkbox is unchecked. The 'Description' field is empty. The 'Items' table has one row with the following data:

Lot Number	Available Qty	Transfer Qty*	To Storage Location	To Storage Unit	New Lot Number	Cost	Gross/Net UOM	Gros
5,685.87074 Bushels	0 Bushels	0 Bushels	Processing Plant	test		26.9153...	0	0

- 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'. The 'Transfer Date' is '12/26/2018'. The 'From Location' is '0001-Fort Wayne'. The 'To Location' is '0001-Fort Wayne'. The 'Source Type' is 'None'. The 'Status' is 'Open'. The 'Transferred By' is 'IRELY ADMIN'. The 'Shipment Required' checkbox is unchecked. The 'Description' field is empty. The 'Items' table has one row with the following data:

Lot Number	Available Qty	Transfer Qty*	To Storage Location	To Storage Unit	New Lot Number	Cost	Gross/Net UOM	Gros
5,685.87074 Bushels	0 Bushels	100 Bushels	Processing Plant	test		26.9153...	0	0

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.

Inventory Transfer - IT-417

New Save Search Delete Undo Print Post Close

Details Activities Attachments Post Preview Post History Audit Log

Transfer No IT-417 From Location 0001-Fort Wayne

Transfer Date 12/26/2018 To Location 0001-Fort Wayne

Source Type None Status Open

Transferred By IRELY ADMIN Shipment Required ☐

Description

Items

+ Insert X Remove Export View Filter (F3)

Lot Number	Available Qty	Transfer Qty*	To Storage Location	To Storage Unit	New Lot Number	Cost	Gross/Net UOM	Gross
	5,685.87074 Bushels	100 Bushels	Processing Plant	test		26.9153...		0
	0	0				0.00		0

? 0.37s Saved 1 of 1 Refresh

- b. Post Inventory Shipment. See [How to Post Inventory Transfer](#).

Inventory Transfer - IT-417

New Save Search Delete Undo Print Unpost Close

Details Activities Attachments Unpost Preview Post History Audit Log

Transfer No IT-417 From Location 0001-Fort Wayne

Transfer Date 12/26/2018 To Location 0001-Fort Wayne

Source Type None Status Closed

Transferred By IRELY ADMIN Shipment Required ☐

Description

Items

Export View Filter (F3)

Item No.*	Description	Ownership Type	From Storage Location	From Storage Unit	Lot Number	Available Qty
<input type="checkbox"/> CORN	CORN	Own	FG Station	FG Bin 1		5,685.87 Bushels
<input type="checkbox"/>						0

? 0.37s Posted 1 of 1 Refresh