

Asgard Desktop Job Aide

Supply Chain Management – Transferring Inventory

Follow the steps below to record inventory transfers between stockrooms. You must have permissions to Edit Stock Items and Transactions. Permissions will be granted at the request of a manager.

For assistance with inventory management, please contact support@katanasoft.com.

Step 1: From the Supply Chain drop-down, open the Stock Item List page.

File Organization Site Facilities Tools Help	
Directory Account List Expense Search Locations • Assets • Work Orders • PM • Projects • Inspections •	Supply Chain - Cleans -
Welcome Page	Stock Item List
F	Stockroom List
\mathbf{A}	Vendor List
ASGARD	Reserves Purchase Request (RPR)
SERVICE-DRIVEN OPERATIONS	Operations Purchase Request (OPR)
Add Tools	Purchase Order

Step 2: Using the green filter bar, search for the Name of the Stock Item. Highlight the item and either double-click or click the **Edit** button.

	Welcome Page Stock I	tem List			
Ne	w Stock Item Associate St	ockroom Edit Delete Tools 🕶	Show Inactive Items 🛛 🗹 Sho	w P/Os Acquire - Lookup UPC:	
D	rag a column header here	to group by that commn.			
	Needs Approval	Category	Part/Item # ∇	Name	Qty
6				square	=
÷.		Heather's Plumbing	SqP3	Square Peg for Round Holes	0
÷		Heather's Plumbing	234566	Square Toilet Seat	49
<u>ا</u>				Toilet Seat - Square	 -2

Step 3: On the Stock Item screen click the Transactions tab, open the New Transaction drop-down and select **Transferred**.

Welcome Page S	tock Item List 9 V	/olt Battery
Name: 9 Volt Bat	tery	lte
Category: Batteries		~
Default Cost/Unit:	0.00	Default Price/Unit:
Stockrooms Transaction	Stock Reductions	Purchasing Work Order Usage
View the Last: 1 Month	- 1	New Transaction - Edit Delete
Drag a column heade	r here te ereve	Purchased/Acquired
Drag a column heade	r nere to group	Used
Transaction Group	Stockroom	Lost or Destroyed
		Returned or Found
70504	Sunset West M	Transferred
/0521	Maintenance V	9 0
		Count/Reconcile

Step 4: Update the Date if necessary (defaults to today). Enter a Reason, if desired. In the orange Transfer column, select the stockroom you're removing the items from and enter a **negative** number for the item being transferred. Again, in the orange Transfer column add the number of items you're transferring to the correct stockroom/s.

You cannot subtract more items than a stockroom currently has. You can transfer an item to multiple stockrooms at once. But the total in the grey box must equal 0 before you can click **OK**.

Transfer 9 Volt Battery	6	n x
Transfer Date: 8/29/2019 9:42 AM		
Reason: Reloading Maint Vans		
Stockroom	On Hand	Transfer
Housekeeping Closet 2	12	0
Maintenance Van 1 Stockroom A	40 0	10
Stockroom A	U 15	0
Sunset West Main Supply	10	-10
		0
	ОК	Cancel
		.:

The new transfer will be recorded on the Transactions screen.

Stockrooms	3 Transactions	Stock Reductions Purchas	sing Work Order Usage UPC	s Log				
View the L	ast: 1 Month	👻 🍟 New Tran	saction - Edit Delete					
Drag a c	olumn heade	r here to group by that colur	nn.					
Transac	ction Group	Stockroom	Date	Туре	Quantity	Count After T	Description	Cost/Unit
▶-12	70521	Sunset West Main Supply	08/29/2019 12:42	Transferred	-10	0	Reloading Maint Vans	
-12	70521	Maintenance Van 1	08/29/2019 03:42	Transferred	10	50	Reloading Maint Vans	\$0.00



On the Stock Item List page, right-click on the item and select **Transfer**.

a column header	here to group by that column.			
eds Approval	Category	Part/Item #	Name	
			battery	
	Batteries	12312323	C Battery	
	Batteries		9 Volt Battery	
	Batteries		AA Battery	New P/O
~	Batteries		AAA Battery	New Purchase Transaction
	Houseware		Clock Radio Batte	Transfer
	Batteries		D Battery	
	Batteries	681062	Lithium Battery	Show/Hide Columns
				Reset Columns to Default