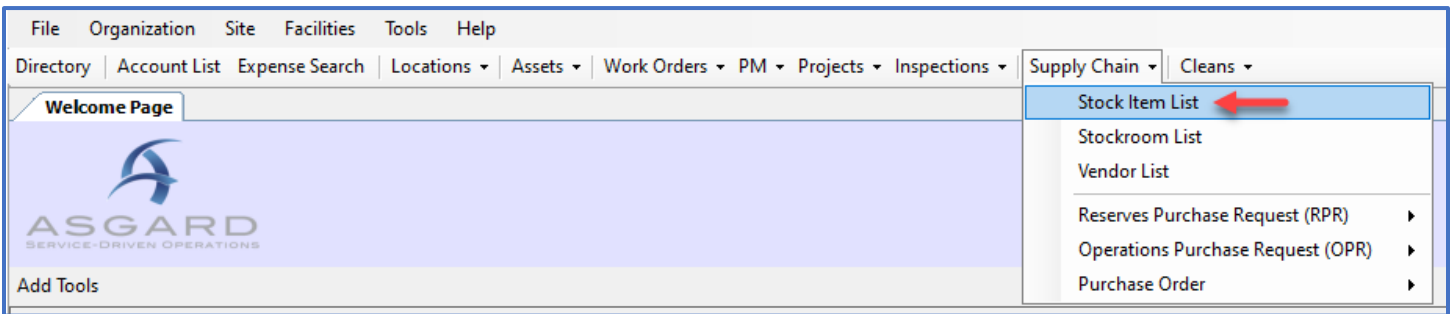


Supply Chain Management – Transferring Inventory

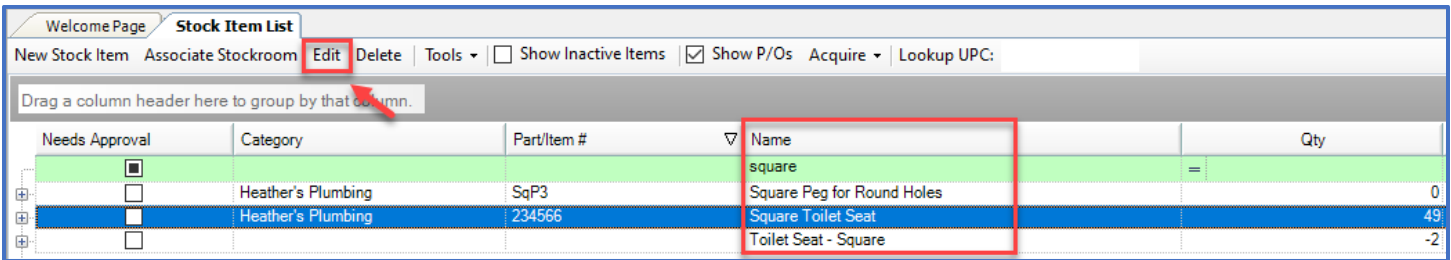
Follow the steps below to record inventory transfers between stockrooms. You must have permissions to Edit Stock Items and Transactions. Permissions will be granted at the request of a manager.

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

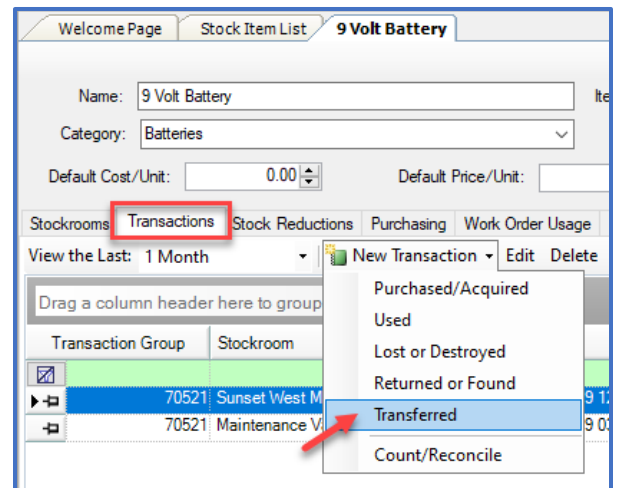
Step 1: From the Supply Chain drop-down, open the **Stock Item List** page.



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.



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



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

Transfer Date: 8/29/2019 9:42 AM

Reason: Reloading Maint Vans

Stockroom	On Hand	Transfer
Housekeeping Closet 2	12	0
Maintenance Van 1	40	10
Stockroom A	0	0
Stockroom C	15	0
Sunset West Main Supply	10	-10
		0

OK Cancel

The new transfer will be recorded on the Transactions screen.

Transaction Group	Stockroom	Date	Type	Quantity	Count After T	Description	Cost/Unit
70521	Sunset West Main Supply	08/29/2019 12:42	Transferred	-10	0	Reloading Maint Vans	
70521	Maintenance Van 1	08/29/2019 03:42	Transferred	10	50	Reloading Maint Vans	\$0.00



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

Needs Approval	Category	Part/Item #	Name
<input type="checkbox"/>			battery
<input checked="" type="checkbox"/>	Batteries	12312323	C Battery
<input type="checkbox"/>	Batteries		9 Volt Battery
<input type="checkbox"/>	Batteries		AA Battery
<input checked="" type="checkbox"/>	Batteries		AAA Battery
<input type="checkbox"/>	Houseware		Clock Radio Batt
<input type="checkbox"/>	Batteries		D Battery
<input type="checkbox"/>	Batteries	681062	Lithium Battery

- New P/O...
- New Purchase Transaction...
- Transfer...**
- Show/Hide Columns
- Reset Columns to Default
- Export to Excel