

<b>Date</b>	June 28, 2024
<b>Subject</b>	Transfers

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## Purpose

The purpose of the transfer is to move product from one location to another.

## Transfer Types

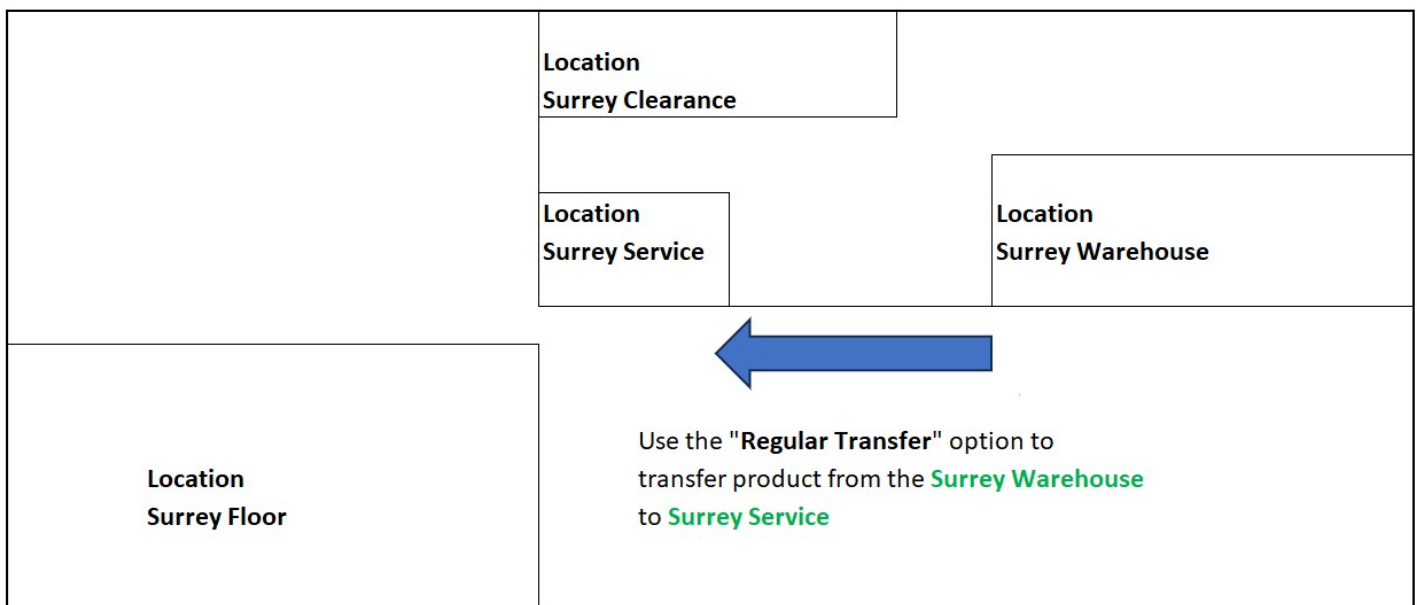
### Serial

There are two types of serial transfers: **Regular and Batch**.

#### Regular Transfer

Use the regular transfer when you are moving product from one location to another within the same physical space.

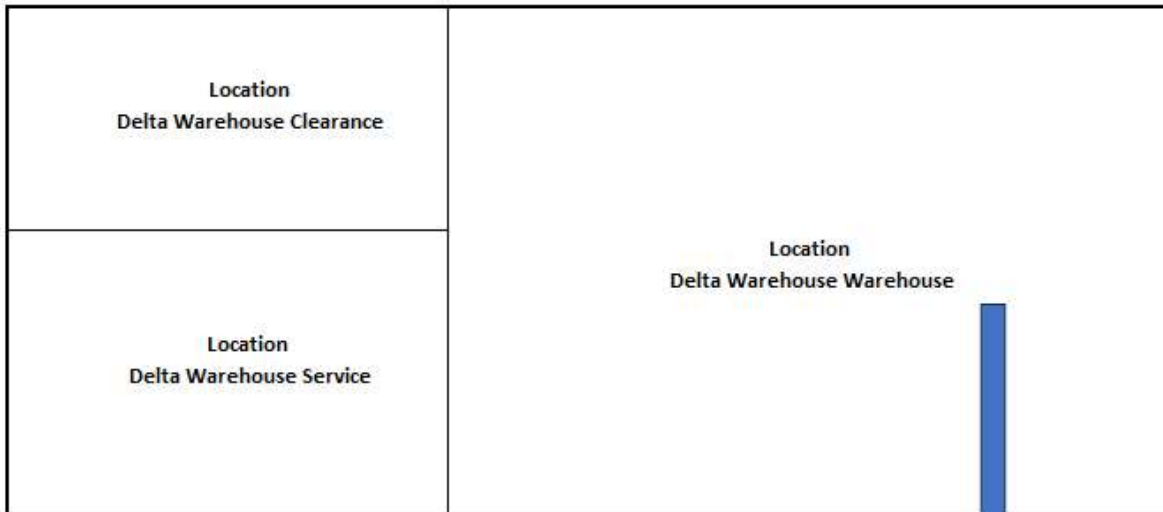
### Branch: Surrey



#### Batch Transfer

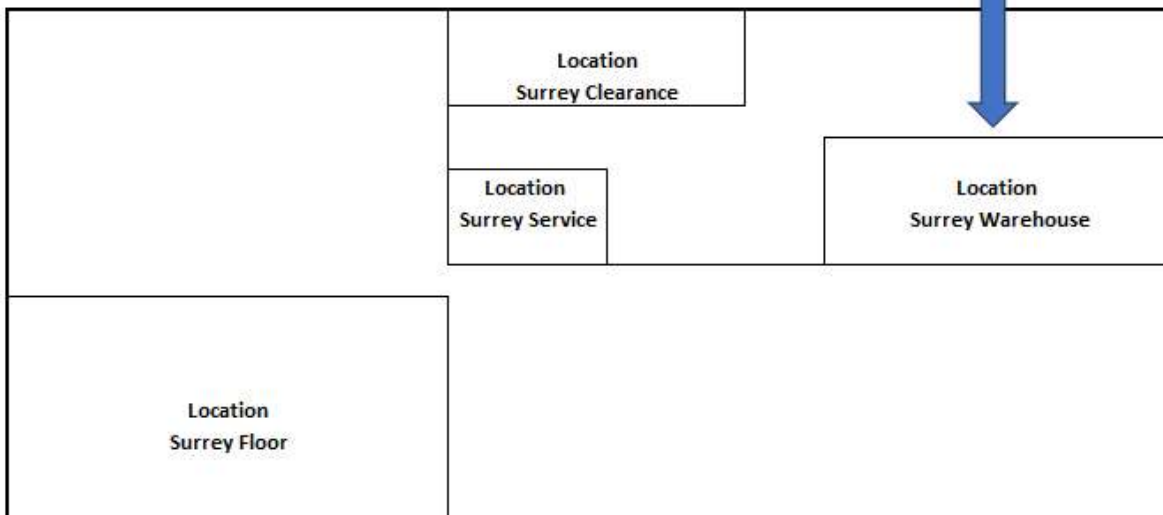
Use the batch transfer to move product from one location to another in a different building. In the example below, the distance between these two buildings is about 30 kilometers (18.6 miles).

### Delta Warehouse (Distribution Center)



Use the "Batch Transfer" option to transfer product from the **Delta Warehouse** to **Surrey Warehouse**.

### Branch: Surrey



### Item

There are two types of item transfers: **Item Inventory** and **Item Prep**.

## Item Inventory

Use the item inventory to transfer an item from one location to another.

## Item Prep

Use item prep to transfer an item from a location to a truck.

# How It Works

## Serial

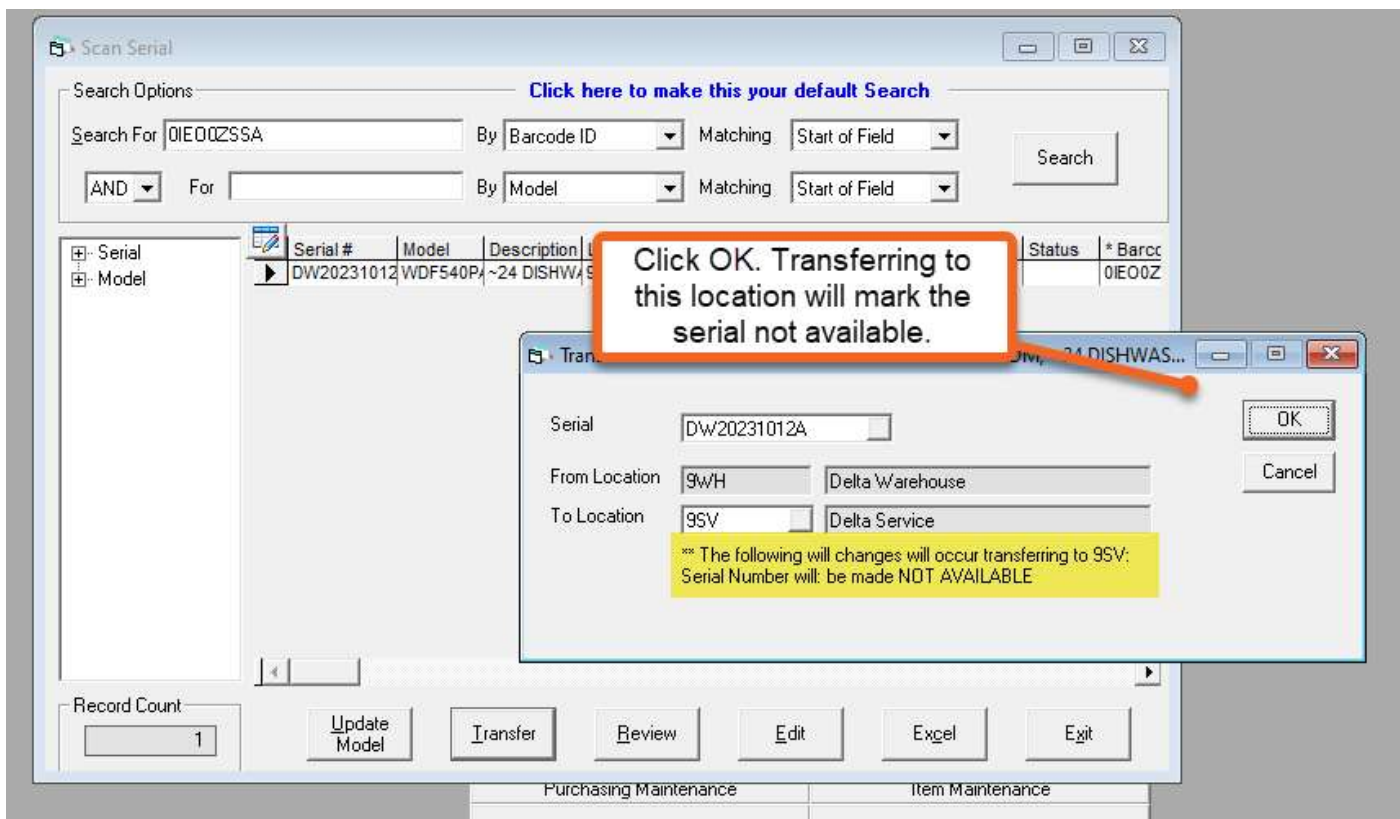
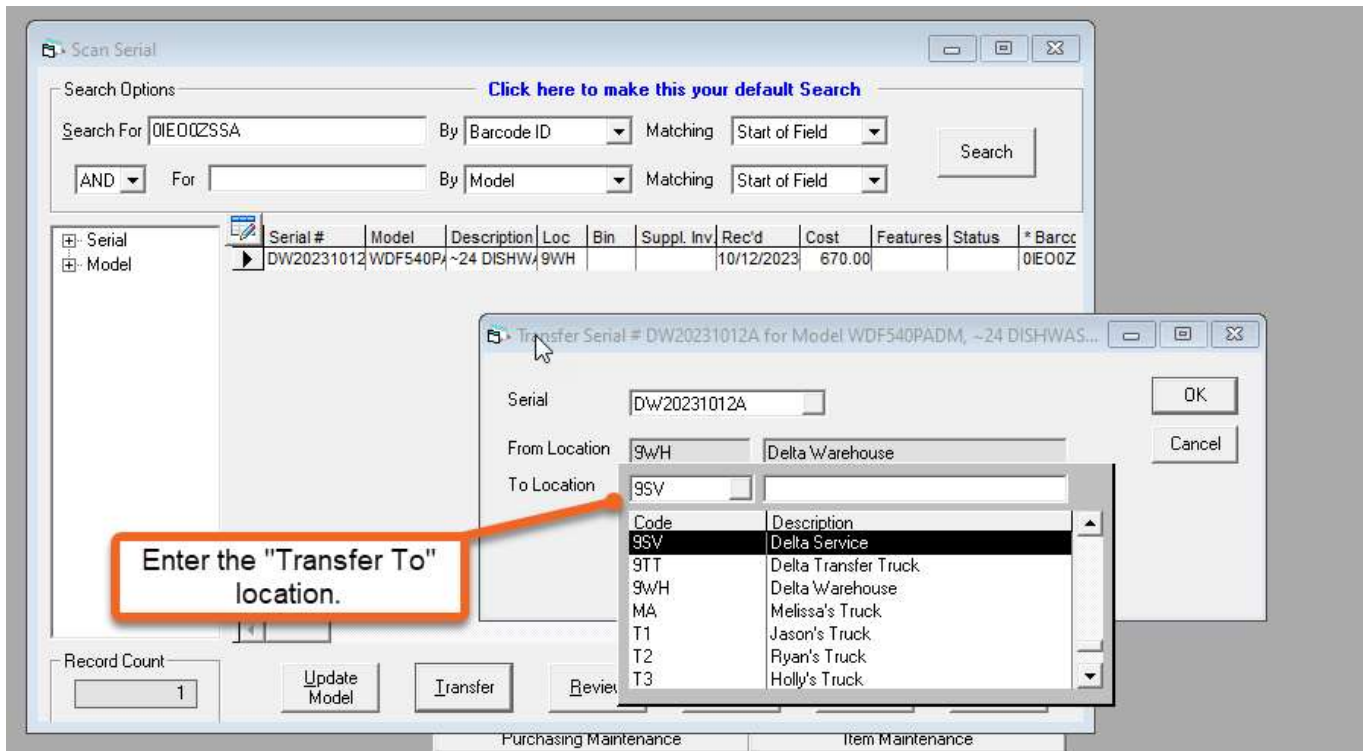
### Regular Transfer

**Scenario:** The warehouse team notices that there are several damaged appliances that need to be transferred to the service location. When these pieces were brought back to the warehouse, it was scanned into the Delta Warehouse (9WH) instead of Delta Service (9SV).

There are several different ways that you can transfer products: Manual, Scan Gun, Mobile Salesperson

### Manual Transfer

The screenshot shows the 'Serial Inventory' application window. The 'Scan Serial' menu item is highlighted with a red circle and labeled '1'. An arrow points to the 'Scan Serial' dialog box, where the search field contains '01E002SSA' and is labeled '2'. The 'Search' button is labeled '3'. A table below shows search results with columns for Serial #, Model, Description, Loc, Bin, Suppl. Inv, Rec'd, Cost, Features, Status, and \* Barcc. One entry is visible: DW20231012, WDF540P, ~24 DISHW, 9WH. A 'Transfer Serial' dialog box is open, showing the serial 'DW20231012A', 'From Location' '9WH', and 'To Location' 'Delta Warehouse'. The 'Transfer' button at the bottom of the main window is labeled '4'.



Review Serial # DW20231012A for Model WDF540PADM, ~24 DISHWASHER, 53 DBA, SS

Serial Detail		Document	
Serial Number	DW20231012A	Available	<input type="checkbox"/>
Run #		Serial Type	
Location	9SV	Barcode ID	01E00ZSSA
Received	10/12/2023	Raw Barcode	
Actual Cost	670.00	Floor Plan	
Freight Amount	0.00	Floor Due	12/31/2040
Dep and Adj	0.00	Trust Document	
Discounts	0.00	Trust Line #	0
Cost	670.00	Bin Location	
Standard Cost	770.74	Status	
Unique Sell Price	0.00	Selling Invoice	
Tag Price	0.00	Ordered for Inv	BS00000025-LOT S10
PO #	MS2	Reserve Exclusive	<input type="checkbox"/>
Supplier Invoice		Exclusive Reserve	<input type="checkbox"/>
Freight Invoice #		Comment Code	
Dye Lot		Supplier	WHIRL BD
Features		Spiff Amount	0.00
Notes		Start	00/00/00
		End	00/00/00

**The product has been transferred to the Delta Service location.**

Buttons: OK, Audit Trail, Reserve

*Scan Gun Transfer*

In the example below, we are using the Android Warehouse Management System (WMS) scan gun.

**EPASS**  
WAREHOUSE MANAGEMENT

Check Stock	Select Transfer	Shipping
Return Shipping		Transfer
Receive Transfer		Assign to Bin
Receiving		Count Inventory
Update Serial		Bin Inquiry
Picking Report		

Back	Home	Signout
------	------	---------

<b>Transfer</b>	Select Regular (Serial)
REGULAR (SERIAL)	
BATCH (SERIAL)	
ITEM INVENTORY	
ITEM PREP	

Back	Home	Signout
------	------	---------



## Transfer

Scan/Type location or [Select From List](#)

Select 9SV

9SV

OK

[← Back](#)

[Home](#)

[Signout](#)

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## Transfer To 9SV

Barcode:(required)

Enter the serial that you want to transfer to 9SV. Click OK after each transfer.

01EO00531

OK

PRINT

[← Back](#)

[Home](#)

[Signout](#)

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## Transfer To 9SV

Barcode:(required)

Enter the serial that you want to transfer to 9SV. Click OK after each transfer.

01EO071W6

OK

PRINT

[← Back](#)

[Home](#)

[Signout](#)

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## Transfer To 9SV

Barcode:(required)

01EQ0ASKH

Enter the serial that you want to transfer to 9SV. Click OK after each transfer.

OK

PRINT

← Back

🏠 Home

⊖ Signout

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## Transfer To 9SV

Barcode:(required)

OK

PRINT

Click Print to print the transfer report. The report will show you all serials that were transferred.

[← Back](#)

[Home](#)

[Signout](#)

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### Andersons Appliances Inventory Transfer Report

WI-01

The system generates the "Batch Number" when you click the option "Regular (Serial)" on the scan gun.



Batch Number: 0716-1335-56947-1

Transfer From: 9WH  
Date: Jul 16/2024

Transfer To: 9SV  
Time: 1:44 pm

Page: 1

Model	Serial	BO Invoice	Date Scanned	Time Scanned
* Models with an asterisk were scanned but not updated. This product must be manually transferred.				
WDF540PADM	DW20231012B		7/16/2024 12:00	01:36:30 PM
WDF540PADM	DW20231012C		7/16/2024 12:00	01:37:13 PM
WDF540PADM	DW20231012D	RS00000110-2	7/16/2024 12:00	01:37:39 PM

Number of Pieces: 3

Loaded By: \_\_\_\_\_  
Transferred By: \_\_\_\_\_  
Received By: \_\_\_\_\_

This report shows you all the serials that were transferred.

#### Mobile Salesperson

**Scenario:** Transfer three damaged appliances (KRBL109ESS) to the service location with the following Barcode IDs: 0W03UV54T, 0W03UD23C, 0W03U3HGB



Look up inventory by model # or barcode

## Build A Quote

Create a new quote for a customer

## Review Quotes

Review / Edit your quotes

## Check Delivery Schedule

Find delivery availability by zone

## Product Catalogue

A picture view of your inventory

## Shipping

Ship product for deliveries or pick-ups

Select Transfer.

### Transfer

Transfer inventory to another location

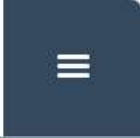
## Receive Transfer

Receive a batch transfer of inventory

## Assign To Bin

Put product in a bin / area

## Receiving



Transfer

Select Regular (Serial)

REGULAR (SERIAL)

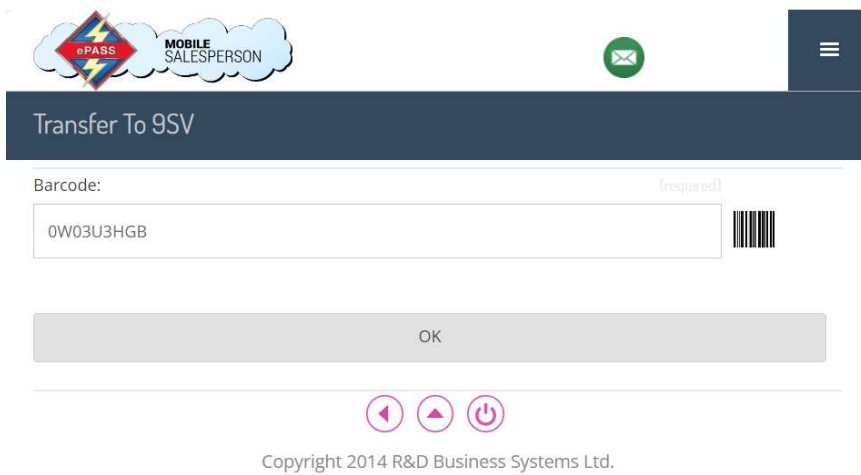
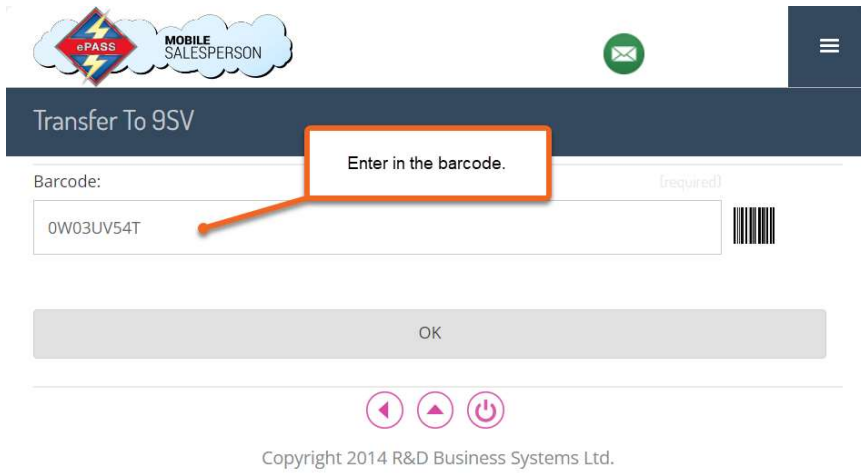
BATCH (SERIAL)

ITEM INVENTORY

ITEM PREP



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**1** Go to Serial Inventory > Wireless Inventory > Activity

**2** Select the Activity Date and Transfers checkbox.

**3** Click Print Transfer Report.

**4** The Batch Number is automatically populated because it's the only one on the screen. Click OK.

Search For: \_\_\_\_\_ By: Model

Show Activity From: 9/12/2024 To: 9/12/2024 Location From: \_\_\_\_\_ Location To: \_\_\_\_\_

Receiving  Shipping  Update Serial  Transfers  Assign To Bin  Only Show Exceptions

Action	Batch	Date	Time	Model	Serial	From	To	OK	Note	User	Barcode ID
Transfer	0912-1617-...	09-12-2024	04:17:39 PM	KRBL109ESS	00010		95V			L	DW03UV54T
Transfer	0912-1617-...	09-12-2024	04:17:54 PM	KRBL109ESS	00018		95V			L	DW03UD23C
Transfer	0912-1617-...	09-12-2024	04:18:12 PM	KRBL109ESS	00025		95V			L	DW03U3HGB

Print Transfer Report

Enter Batch Number

0912-1617-24522-1

OK Cancel

Record Count: 3

Export Print Labels **Print Transfer Report** Print Activity Receive Delete Exit

*Andersons Appliances*  
**Inventory Transfer Report**

WI-01



Transfer From: Main Stock      Transfer To: 9SV      **Batch Number: 0912-1617-24522-1**  
Date: Sep 12/2024      Time: 4:21 pm      Page: 1

Model	Serial	BO Invoice	Date Scanned	Time Scanned
* Models with an asterisk were scanned but not updated. This product must be manually transferred.				
KRBL109ESS	00010		9/12/2024 12:00:04	04:17:39 PM
KRBL109ESS	00018		9/12/2024 12:00:04	04:17:54 PM
KRBL109ESS	00025		9/12/2024 12:00:04	04:18:12 PM

Number of Pieces: 3

Loaded By: \_\_\_\_\_  
Transferred By: \_\_\_\_\_  
Received By: \_\_\_\_\_

**Batch Transfer**

**Scenario:** South Surrey Store Manager, Johnny Blaze, is getting ready to prepare his weekly stock transfer from the Delta Warehouse. He reviews his outstanding invoices for the coming week and adds the required product to the request. Because he has limited real estate, he tries to keep just in time inventory.

*Transfer Truck Location Setup*

In a batch transfer, the product is transferred from the current location to the truck and received at the destination location. To reflect the correct location of the product during transport, the transfer truck location is created.



Review Location 1TT South Surrey Transfer Truck

Code: 1TT

Description: South Surrey Transfer Truck

Branch: 1

Ship To Customer Code (For PO Ship To):

General Options:

- Add Location for new Items
- Show On Web
- Immediate Ship

**The following options apply when a Serial Number arrives in this location (by Receive, Transfer, Edit Serial, etc.)**

Change to Serial Type: \* BLANK = Don't change Serial Type

- Exclude 'Special' Serial Types
- Non-Saleable (product transferred to this location will be made AVAILABLE)  Exclude 'Special' Serial Types
- Exclusive Reserve (product will be made Exclusive Reserve)
- UN-Exclusive Reserve (product will be made NOT Exclusive Reserve)
- UN-Reserve from Invoice (product will be unreserved from any invoice)
- Zero Unique/Tag Price (product will be updated with \$0 Unique Sell Price and Tag Price)

Create a transfer truck location.  
Each location will need a transfer truck location.

Auto Generated Transfers

Invoice # RS0000175 - Tam, Koj - Review Model

Type	Pack	Item	Loc	Description	Qty	Amount	Tax	Status	QOH
Model	No	KRBL109ESS	TWH	30 BOTTOM MOUNT, SS	1	2,857.65	NNY	Reserve...	0/37
Misc	No	TRIF00		Delivery Fees		60.00	NNN		
Payment	No	VISA		5454213	0	3,280.57	NNN	Open	
Misc	No	CCUPC		CC Upcharge Fee	1	98.42	NNN		
Payment	No	VISA		5485132154	0	101.37	NNN	Open	
Misc	No	CCUPC		CC Upcharge Fee	1	2.95	NNN		

Serial # for Model KRBL109ESS, 30 BOTTOM MOUNT, SS

Loc	QOH	QOO	WRI	Jul	Jun
1wH	0	0	1	0	0
9wH	37	0	3	0	0

When the product is delivered out of a different warehouse than where it is reserved, EPASS will automatically generate a transfer.

Serial #	Avail	Loc	Bin	Suppl Invoice	Ordered for Inv	Received	Cost	Std. Cost	Fi
00086	9WH	W1				10/9/2022	1855.34	2017.31	1
00087	9WH	W1				10/9/2022	1855.34	2017.31	1
00088	9WH	W1				10/9/2022	1855.34	2017.31	1
00089	9WH	W1				10/9/2022	1855.34	2017.31	1
00090	9WH	W1				10/9/2022	1855.34	2017.31	1
00091	9WH	W1				10/9/2022	1855.34	2017.31	1
00092	9WH	W1				10/9/2022	1855.34	2017.31	1
00093	9WH	W1				10/9/2022	1855.34	2017.31	1
00094	9WH	W1				10/9/2022	1855.34	2017.31	1
00095	9WH	W1				10/9/2022	1855.34	2017.31	1
00096	9WH	W1				10/9/2022	1855.34	2017.31	1
00097	9WH	W1				10/9/2022	1855.34	2017.31	1
00098	9WH	W1				10/9/2022	1855.34	2017.31	1
00099	9WH	W1				10/9/2022	1855.34	2017.31	1
00010	9WH	W1				10/9/2022	1855.34	2017.31	1
00011	9WH	W1				10/9/2022	1855.34	2017.31	1
00004	9WH	W1		RS00000100		10/9/2022	1855.34	2017.31	1
00011	9WH	W1		RS00000117		10/9/2022	1855.34	2017.31	1

Go to "Request Transfer Maintenance" to add transfer requests.

Request Transfer Maintenance

Transfer Requests

Search Options

Search For 7/17/2024

By Needed By Matching Alter

AND For TWH South Surrey Ware

By To Location Matching Equal

AND For

By Model/Item # Matching Equal

Model/Item	Serial #	Qty	From	To	Date Required	Created By	Invoice	Status	Job Status	Schedule Date	Batch Number
KRBL109ESS	00004	1	9WH	1wH	7/17/2024	L	RS00000175	Open	FIRM	7/31/2024	

This is an auto generated stock transfer.

Manual Stock Transfer

**Transfer Requests**

Search Options [Click here to make this your default Search](#)

Search For: 7/1/2024 By: NEEDED BY Matching: After

AND For: 1WH South Surrey Ware By: TO LOCATION Matching: Equal

AND For: By: MODEL/ITEM # Matching: Equal

Model/Item	Serial #	Qty	From	To	Date Required	Created By	Invoice	Status	Job Status	Schedule Date	Batch Number
KRBL109ESS	00004	1	9WH	1WH	7/17/2024	L	RS00000175	Open	FIRM	7/31/2024	
YwMC30516HZ	Yw216354654	1	9WH	1WH	7/25/2024	L	RS00000002	Open	FIRM	7/25/2024	
MK2160AZ	00001	1	9WH	1WH	7/25/2024	L	RS00000002	Open	FIRM	7/25/2024	
WDF331PAMB	WD54689784	1	9WH	1WH	7/25/2024	L	RS00000002	Open	FIRM	7/25/2024	

**Add Transfer Request**

Model / Item: KDTE204KPS (Model) (Item) [OK] [Cancel]

Serial #: [Dropdown]

Invoice: [Text]

Qty: 1 Color: [Dropdown]

From: 9WH Delta Warehouse

To: 1WH South Surrey Warehouse

Needed By: 7/25/2024 Status: Open

Batch #: [Text]

Note: [Text Area]

Created: 00/00/00 Modified: 00/00/00

**You can add a model to a transfer without linking it to a serial or invoice. In this scenario, we are requesting 1 for the showroom floor.**

The screenshot displays the EPASS software interface. At the top, there is a 'Transfer Requests' window with search options. Below it is a table of transfer requests. A dialog box 'Add Transfer Request' is open, showing fields for Model/Item, Serial #, Invoice, Qty, From, To, Needed By, and Status. A warning message 'Note cannot be blank!' is displayed over the 'Note' field. A callout box points to the 'Require Note on Manual Interstore Transfer' checkbox in the 'Serial Inventory Variables' dialog, which is also open. This dialog has tabs for 'General', 'Interstore', and 'Titles'. The 'Interstore' tab is active, showing various settings for manual stock transfers.

Model/Item	Serial #	Qty	From	To	Date Required	Created By	Invoice	Status	Job Status	Schedule Date	Batch Number
KRBL10E55	00004	1	9WH	1WH	7/17/2024	L	RS00000175	Open	FIRM	7/31/2024	
YWMC30516HZ	Yw216354654	1	9WH	1WH	7/25/2024		000000002	Open	FIRM	7/25/2024	
MK2160AZ	00001	1	9WH	1WH	PASS		0000002	Open	FIRM	7/25/2024	
WDF331PAMB	WD54689784	1	9WH	1WH			0000002	Open	FIRM	7/25/2024	

**Note cannot be blank!**

On the Serial Inventory Variables, there is an option called "Require Note on Manual Interstore Transfer". When this is enabled, you will be prompted to add a note.

Note is required when adding a manual stock transfer.

Transfer Requests

Search Options [Click here to make this your default Search](#)

Search For: 7/1/2024 By: Needed By Matching: After

AND For: 1WH South Surrey Ware By: To Location Matching: Equal

AND For: By: Model/Item # Matching: Equal

Model/Item	Serial #	Qty	From	To	Date Required	Created By	Invoice	Status	Job Status	Schedule Date	Batch Number
KRBL109ESS	00004	1	9WH	1WH	7/17/2024	L	RS00000175	Open	FIRM	7/31/2024	
YWMC30516HZ	Yw216354654	1	9WH	1WH	7/25/2024	L	RS00000002	Open	FIRM	7/25/2024	
MK216QAZ	00001	1	9WH	1WH	7/25/2024	L	RS00000002	Open	FIRM	7/25/2024	
WDF331PAMB	WD54689784	1	9WH	1WH	7/25/2024	L	RS00000002	Open	FIRM	7/25/2024	

Add Transfer Request

Model / Item: KDTE204KPS Model Item OK

Serial #:

Invoice:

Qty:  Color:

From: 9WH  Delta Warehouse

To: 1WH  South Surrey Warehouse

Needed By: 7/25/2024  Status: Open

Batch #:

Note:  Add the note.

Created:

Modified:

Inventory Split List Exit

Transfer Requests

Search Options [Click here to make this your default Search](#)

Search For: 7/1/2024 By: Needed By Matching: After

AND For: 1WH South Surrey Ware By: To Location Matching: Equal

AND For: By: Model/Item # Matching: Equal

Model/Item	Serial #	Qty	From	To	Date Required	Created By	Invoice	Status	Job Status	Schedule Date	Batch Number
KRBL109ESS	00004	1	9WH	1WH	7/17/2024	L	RS00000175	Open	FIRM	7/31/2024	
YWMC30516HZ	Yw216354654	1	9WH	1WH	7/25/2024	L	RS00000002	Open	FIRM	7/25/2024	
MK216QAZ	00001	1	9WH	1WH	7/25/2024	L	RS00000002	Open	FIRM	7/25/2024	
WDF331PAMB	WD54689784	1	9WH	1WH	7/25/2024	L	RS00000002	Open	FIRM	7/25/2024	
KDTE204KPS		1	9WH	1WH	7/25/2024	L		Open			

The transfer request has been manually added.

Inventory Split Line Change Date Change Status Print Review Add Edit Delete Exit

*Transfer Status*

Aside from the system statuses, you can also set up your own transfer statuses. For example, you can set up a status "Reserved" to differentiate auto transfers vs manual transfers.

The image shows three overlapping windows from the EPASS software. The top-left window, titled "Transfer Status", contains a table with two columns: "\* Code" and "Category". The rows are: Accepted (Open), Cancelled (Completed), Decline (Completed), Open (Open), Processing (Open), **Reserved (Open)**, and Transferred (Completed). Below the table are buttons for Print, Review, Add, Edit, Delete, and Exit. The top-right window, titled "Serial Inventory Variables", has tabs for General, Interstore, and Titles. The Interstore tab is active, showing fields for Last Interstore #, Barcode File Name, Cost Type (Average, Last, Standard), Require (Standard Cost, Inventory Type), Transfer Report (Batch, On-Line, None), Tax 1 (Active, Included, List, Cost), and Auto Transfer Requests Status (Reserved). The bottom window, titled "Review Transfer Status Reserved", has a yellow background and shows Code: Reserved and Category: Open. It also has a checkbox for "Transfer Inventory when changing to this Status".

The image shows the "Transfer Requests" window with search options and a table of requests. Below the table, there are callout boxes and a "Change Status" dropdown menu. The table has columns: Model/Item, Serial #, Qty, From, To, Date Required, Created By, Invoice, Status, Job Status, Schedule Date, and Batch Number. The data rows are: KRBL109ESS (00004, 1, 9wH, 1wH, 7/17/2024, L, RS00000175, Open, FIRM, 7/31/2024), YwMC30516HZ (Yw216354654, 1, 9wH, 1wH, 7/25/2024, L, RS00000002, Open, FIRM, 7/25/2024), MK2160AZ (00001, 1, 9wH, 1wH, 7/25/2024, L, RS00000002, Open, FIRM, 7/25/2024), wDF331PAMB (wD54689784, 1, 9wH, 1wH, 7/25/2024, L, RS00000002, Open, FIRM, 7/25/2024), and KDTE204KPS (00001, 1, 9wH, 1wH, 7/25/2024, L, RS00000002, Open, FIRM, 7/25/2024). The "Change Status" dropdown menu shows: Open, **Accepted**, Transferred, Processing, Decline, and Cancelled. The callout boxes explain the system statuses and how to change a request to "Accepted".

**System Statuses:** Triggered depending on the action taken  
**Open** > Manual stock transfer is created  
**Processing** > Batch is generated  
**Transferred** > Product has been transferred to the truck  
**Completed** > Product has been received

You can change the status to "Accepted" to show that the transfer request has been approved.  
 For example, in some companies, the purchasing department reviews the request and depending on fulfillment requirements will either accept, change or decline the request.

*Date Required*

Transfer Requests

Search Options: [Click here to make this your default Search](#)

Search For: 7/1/2024

By: Needed By Matching: After

AND For: 1WH South Surrey Ware By: To Location Matching: Equal

AND For: By: Model/Item # Matching: Equal

Model/Item	Serial #	Qty	From	To	Date Required	Created By	Invoice	Status	Job Status	Schedule Date	Batch Number
KRBL109ESS	00004	1	9WH	1WH	7/17/2024	L	RS00000175	Accepted	FIRM	7/31/2024	
YWMC30516HZ	YW216354654	1	9WH	1WH	7/25/2024	L	RS00000002	Accepted	FIRM	7/25/2024	
MK21604Z	00001	1	9WH	1WH	7/25/2024	L	RS00000002	Accepted	FIRM	7/25/2024	
WDF331PAMB	WD54689784	1	9WH	1WH	7/25/2024	L	RS00000002	Accepted	FIRM	7/25/2024	
KDTE204KPS		1	9WH	1WH	7/25/2024	L		Accepted			

Change Date: 07/26/24

OK Cancel

Date Required is defined as the date when you require the product to be delivered to your warehouse.

Inventory Split Line Change Date Change Status Print Review Add Edit Delete Exit

Serial Inventory Variables

General Interstore Titles

Last Interstore #: 0

Barcode File Name:

Cost Type: Average Last Standard

Require: Standard Cost Inventory Type

Transfer Report: Batch On-Line None

Tax 1: Active Included List Cost

Auto Transfer Requests Status: Open

Use Schedule Date For Transfer

Transfer Request - Warning if None Available

Require Note On Manual Interstore Transfer

Allow same Model/Serial on Transfer Request multiple times

Do Not Remove Open Transfer Request when Serial is Shipped

Prior to adding the "Schedule Date" to the "Transfer Request Maintenance" screen, there was an option in Serial Inventory Variables that would use the "Schedule Date" for the "Date Required". If you want the "Date Required" to be the date that you created the stock transfer, then disable this option.

Transfer Requests

Search Options: [Click here to make this your default Search](#)

Search For: 7/1/2024

By: Needed By Matching: After

AND For: 1WH South Surrey Ware By: To Location Matching: Equal

AND For: By: Model/Item # Matching: Equal

Model/Item	Serial #	Qty	From	To	Date Required	Created By	Invoice	Status	Job Status	Schedule Date	Batch Number
KRBL109ESS	00004	1	9WH	1WH	7/26/2024	L	RS00000175	Accepted	FIRM	7/31/2024	
YWMC30516HZ	YW216354654	1	9WH	1WH	7/26/2024	L	RS00000002	Accepted	FIRM	7/25/2024	
MK21604Z	00001	1	9WH	1WH	7/26/2024	L	RS00000002	Accepted	FIRM	7/25/2024	
WDF331PAMB	WD54689784	1	9WH	1WH	7/26/2024	L	RS00000002	Accepted	FIRM	7/25/2024	
KDTE204KPS		1	9WH	1WH	7/26/2024	L		Accepted			

The "Date Required" has been changed.

Inventory Split Line Change Date Change Status Print Review Add Edit Delete Exit

## Inventory

Transfer Requests

Search Options [Click here to make this your default Search](#)

Search For [7/1/2024] By [Needed By] Matching [After] Search

AND For [1WH] [South Surrey Ware] By [To Location] Matching [Equal]

AND For [ ] By [Model/Item #] Matching [Equal]

Model/Item	Serial #	Qty	From	To	Date Required	Created By	Invoice	Status	Job Status	Schedule Date	Batch Number
KIRBL10ESS	00004	1	9WH	1WH	7/26/2024	L	RS00000175	Accepted	FIRM	7/31/2024	
YWMC30516HZ	YVW216354654	1	9WH	1WH	7/26/2024	L	RS00000002	Accepted	FIRM	7/25/2024	
MK2160AZ	00001	1	9WH	1WH	7/26/2024	L	RS00000002	Accepted	FIRM	7/25/2024	
WDF331PMB	WD54689784	1	9WH	1WH	7/26/2024	L	RS00000002	Accepted	FIRM	7/25/2024	
KDTE204KPS		1	9WH	1WH	7/26/2024	L		Accepted			

Inventory allows you to check the quantity on hand for the location that you are requesting the inventory from.

Inventory Splt Line Change Date Change Status Print Review Add Edit Delete Exit

Serial # for Model KDTE204KPS, 24 DISHWASHER, 39 DBA, SS

Summary

Loc	QOH	QOD	WRI	Jul	Jun
9WH	4	0	0	0	0

Details

Serial #	Avail	Loc	Bin	Suppl Invoice	Ordered for Inv	Received	Cost	Std
00001	9WH			LA20231014A		10/14/2023	1222.20	1
00002	9WH			LA20231014A		10/14/2023	1222.20	1
00003	9WH			LA20231014A		10/14/2023	1222.20	1
00005	9WH			LA20231014A		10/14/2023	1222.20	1

Supplier Inventory

Supplier	WHS	QOH	ETA	QOD	QOD ETA

Reserve Exclusive Reserve it Price Protection Review Add Edit Delete

Model Description Brand Code Brand Description Product Code Product Description



Split Line

Transfer Requests

Search Options [Click here to make this your default Search](#)

Search For: 7/1/2024 By: Needed By Matching: After

AND For: 1WH South Surrey Ware By: To Location Matching: Equal

AND For: By: Model/Item # Matching: Equal

Model/Item	Serial #	Qty	From	To	Date Required	Created By	Invoice	Status	Job Status	Schedule Date	Batch Number
KRBL109ESS	00004	1	9WH	1WH	7/26/2024	L	RS00000175	Accepted	FIRM	7/31/2024	
YWMC30516HZ	Yw216354654	1	9WH	1WH	7/26/2024	L	RS00000002	Accepted	FIRM	7/25/2024	
MK2160AZ	00001	1	9WH	1WH	7/26/2024	L	RS00000002	Accepted	FIRM	7/25/2024	
WDF331PAMB	WD54689784	1	9WH	1WH	7/26/2024	L	RS00000002	Accepted	FIRM	7/25/2024	
KDTE204KPS		2	9WH	1WH	7/26/2024	L		Accepted			

Inventory **Split Line** Change Date Change Status Print Review Add Edit Delete Exit

Split Transfer Request Line

Model/Item	Serial	Qty	From	To	Date Required	Status	Created By	Batch Number
KDTE204KPS		1	9WH	1WH	7/26/2024	Accepted	L	
KDTE204KPS		1	9WH	1WH	7/26/2024	Accepted	L	
Total		2						

Enter the new line's Qty:

OK Cancel

If the location that you are requesting product from can only provide you 1 out of the 2 serials, then you can split the line and change the date required for the second one.

Transfer Requests

Search Options: [Click here to make this your default Search](#)

Search For: 7/1/2024 By: Needed By Matching: After

AND For: 1WH South Surrey Ware By: To Location Matching: Equal

AND For: By: Model/Item # Matching: Equal

Model/Item	Serial #	Qty	From	To	Date Required	Created By	Invoice	Status	Job Status	Schedule Date	Batch Number
KRBL109ESS	00004	1	9WH	1WH	7/26/2024	L	RS00000175	Accepted	FIRM	7/31/2024	
YWMC30516HZ	Yw216354654	1	9WH	1WH	7/26/2024	L	RS00000002	Accepted	FIRM	7/25/2024	
MK2160AZ	00001	1	9WH	1WH	7/26/2024	L	RS00000002	Accepted	FIRM	7/25/2024	
WDF331PAMB	WD54689784	1	9WH	1WH	7/26/2024	L	RS00000002	Accepted	FIRM	7/25/2024	
KDTE204KPS		1	9WH	1WH	7/26/2024	L		Accepted			
KDTE204KPS		1	9WH	1WH	7/26/2024	L		Accepted			

Change the date required to when you'll need the product next.

Change Date: 08/02/24

Buttons: Inventory, Split Line, Change Date, Change Status, Print, Review, Add, Edit, Delete, Exit

Transfer Requests

Search Options: [Click here to make this your default Search](#)

Search For: 7/1/2024 By: Needed By Matching: After

AND For: 1WH South Surrey Ware By: To Location Matching: Equal

AND For: By: Model/Item # Matching: Equal

Model/Item	Serial #	Qty	From	To	Date Required	Created By	Invoice	Status	Job Status	Schedule Date	Batch Number
KRBL109ESS	00004	1	9WH	1WH	7/26/2024	L	RS00000175	Accepted	FIRM	7/31/2024	
YWMC30516HZ	Yw216354654	1	9WH	1WH	7/26/2024	L	RS00000002	Accepted	FIRM	7/25/2024	
MK2160AZ	00001	1	9WH	1WH	7/26/2024	L	RS00000002	Accepted	FIRM	7/25/2024	
WDF331PAMB	WD54689784	1	9WH	1WH	7/26/2024	L	RS00000002	Accepted	FIRM	7/25/2024	
KDTE204KPS		1	9WH	1WH	7/26/2024	L		Accepted			
KDTE204KPS		1	9WH	1WH	8/2/2024	L		Accepted			

The Date Required has changed.

Buttons: Inventory, Split Line, Change Date, Change Status, Print, Review, Add, Edit, Delete, Exit

1 Change the date to search for Jul 26/24 transfers only. The Aug 2/24 will drop off.

2 Click here to make this your default Search

3 Search

Transfer Requests

Search Options

Search For 7/26/2024

By Needed By Matching Equal

AND For 1WH South Surrey Ware

By To Location Matching Equal

AND For

By Model/Item # Matching Equal

Model/Item	Serial #	Qty	From	To	Date Required	Created By	Invoice	Status	Job Status	Schedule Date	Batch Number
KRBL109ESS	00004	1	9wH	1wH	7/26/2024	L	RS00000175	Accepted	FIRM	7/31/2024	
YWMC30516HZ	Yw216354654	1	9wH	1wH	7/26/2024	L	RS00000002	Accepted	FIRM	7/25/2024	
MK2160AZ	00001	1	9wH	1wH	7/26/2024	L	RS00000002	Accepted	FIRM	7/25/2024	
WDF331PAMB	WD54689784	1	9wH	1wH	7/26/2024	L	RS00000002	Accepted	FIRM	7/25/2024	
KDTE204KPS		1	9wH	1wH	7/26/2024	L		Accepted			
KDTE204KPS		1	9wH	1wH	8/2/2024	L		Accepted			

Inventory Split Line Change Date Change Status Print Review Add Edit Delete Exit

Transfer Requests

Search Options

Search For 7/26/2024

By Needed By Matching Equal

AND For 1WH South Surrey Ware

By To Location Matching Equal

AND For

By Model/Item # Matching Equal

Search

Model/Item	Serial #	Qty	From	To	Date Required	Created By	Invoice	Status	Job Status	Schedule Date	Batch Number
KRBL109ESS	00004	1	9wH	1wH	7/26/2024	L	RS00000175	Accepted	FIRM	7/31/2024	
YWMC30516HZ	Yw216354654	1	9wH	1wH	7/26/2024	L	RS00000002	Accepted	FIRM	7/25/2024	
MK2160AZ	00001	1	9wH	1wH	7/26/2024	L	RS00000002	Accepted	FIRM	7/25/2024	
WDF331PAMB	WD54689784	1	9wH	1wH	7/26/2024	L	RS00000002	Accepted	FIRM	7/25/2024	
KDTE204KPS		1	9wH	1wH	7/26/2024	L		Accepted			

Inventory Split Line Change Date Change Status Print Review Add Edit Delete Exit

Only the Jul 26/24 transfers appear.

*It's Time to Scan the Batch*

Print the PO-19 Model / Item Transfer Report

There are two ways to print the transfer report and generate the batch:

1. Print the report to a viewer, review the data, generate the batch and print.
2. A new option has been added in 2024 on the PO Transfer Report screen that lets you print and generate the batch immediately.

### Print the report to a Viewer and Generate a Batch

**1** Print the transfer request and generate the batch. The transfer request will be used for shipping.

**2** Fill in the From and To Location.

**3** Fill in the Date Required.

**4** Select the status.

**5** Make sure this option is deselected if you want to review the report before generating the batch. If this option is selected, then the batch will automatically generate and print when you press "OK" to run the report.

Model/Item	Serial #	Qty	From	To	Date Required	Created By	Invoice	Status	Job Status	Schedule Date	Batch Number
KRBL10SESS	00004	1	Sw/H	1w/H	7/26/2024	L	RS00000175	Accepted	FIRM	7/31/2024	
YWMC30516HZ	YW216354654	1	Sw/H	1w/H	7/26/2024	L	RS00000002	Accepted	FIRM	7/25/2024	
MK2190KZ	00001	1	Sw/H	1w/H	7/26/2024	L	RS00000002	Accepted	FIRM	7/25/2024	
WDF331PAMB	WD54689784	1	Sw/H	1w/H	7/26/2024	L	RS00000002	Accepted	FIRM	7/25/2024	
KDTE204KPS		1	Sw/H	1w/H	7/26/2024	L		Accepted			

Generate Batch & Print

Click Generate Batch and Print. This will create a barcode for the batch number that the warehouse team will scan during shipping.

Andersons South Surrey

PO-19

**Model/Item Transfer Request**

Request Date From: 7/26/2024 Request Date To: 7/26/2024 Brand: All Records Report Date: 07/18/24 Batch:  
Location From: Delta Wareh Location To: South Surr Product: All Records Branch: 1 Status: Accepted

Model/Item	Qty	Bin	Description	From	To	Color	Brand	Product	Required	User	Status
			Invoice #	Customer Name				Serial Code	Barcode ID		Bin
All Transfer Requests to:				IWH	3091 152 Street 300 Surrey						
KRBL109ESS	1		30 BOTTOM MOUNT RS00000175	9WH Tam	1WH		KI	APP 0W03UT474	7/26/24	L	Accepted
YWMC30516HZ	1		1.6 CU FT COUNTERT RS00000002	9WH Andersen	1WH		JEN	APP YW216354654 135249Y7P	7/26/24	L	Accepted
MK2160AZ	1		MICROWAVE TRIM RS00000002	9WH Andersen	1WH		JEN	APP T0022SL83	7/26/24	L	Accepted
WDF331PAMB	1		24 DISHWASHER RS00000002	9WH Andersen	1WH		JEN	APP WD54689784	7/26/24	L	Accepted
KDTE204KPS	1		24 DISHWASHER, 3 Require for showroom	9WH	1WH		KI	APP 2K796Q711	7/26/24	L	Accepted

Total Pieces: 5

Loaded By: \_\_\_\_\_  
Transferred By: \_\_\_\_\_  
Received By: \_\_\_\_\_

Andersons South Surrey

PO-19

Model/Item Transfer Request



Request Date From: 7/26/2024 Request Date To: 7/26/2024 Brand: All Records Report Date: 07/18/24 Batch: TX-0719-1532-6Z  
Location From: Delta Wareh Location To: South Surr Product: All Records Branch: 1 Status: Accepted

Model/Item	Qty	Bin	Description	From	To	Color	Brand	Product Required	User	Status
			<u>Invoice #</u>		<u>Customer Name</u>			<u>Serial Code</u>		<u>Bin</u>
			<u>Note</u>					<u>Barcode ID</u>		

All Transfer Requests to: 1WH 3091 152 Street 300 Surrey

Print Setup

No Printer

Printer

Name:

Default Properties

Status: Ready

Type: Microsoft Print To PDF

Where: PORTPROMPT:

Comment:

---

Paper

Size:

Source:

---

Orientation

Portrait

Landscape

KI	APP	7/26/24	L	Accepted
	00004			
	0W03UT474			
JEN	APP	7/26/24	L	Accepted
	YW216354654			
	135249Y7P			
JEN	APP	7/26/24	L	Accepted
	00001			
	T0022SL83			
JEN	APP	7/26/24	L	Accepted
	WD54689784			
	2K796Q711			
KI	APP	7/26/24	L	Accepted

Print the PO-19 Model / Item Transfer Report.

Andersons South Surrey

This is the  
barcode for the  
batch number.

PO-19

Model/Item Transfer Request



Request Date From: 7/26/2024 Request Date To: 7/26/2024 Brand: All Records Report Date: 07/18/24 Batch: TX-0719-1532-6Z  
Location From: Delta Wareh Location To: South Surr Product: All Records Branch: 1 Status: Accepted

Model/Item	Qty	Bin	Description	From	To	Color	Brand	Product	Required	User	Status
			Invoice #	Customer Name				Serial Code			Bin
			Note					Barcode ID			
All Transfer Requests to: 1WH 3091 152 Street 300 Surrey											
KRBL109ESS	1		30 BOTTOM MOUNT RS00000175	9WH Tam	1WH		KI	APP 00004 0W03UT474	7/26/24	L	Accepted
YWMC30516HZ	1		1.6 CU FT COUNTERT RS00000002	9WH Andersen	1WH		JEN	APP YW216354654 135249Y7P	7/26/24	L	Accepted
MK2160AZ	1		MICROWAVE TRIM RS00000002	9WH Andersen	1WH		JEN	APP 00001 T0022SL83	7/26/24	L	Accepted
WDF331PAMB	1		24 DISHWASHER RS00000002	9WH Andersen	1WH		JEN	APP WD54689784 2K796Q711	7/26/24	L	Accepted
KDTE204KPS	1		24 DISHWASHER, 3 Require for showroom	9WH	1WH		KI	APP	7/26/24	L	Accepted

Total Pieces: 5

Loaded By: \_\_\_\_\_

Transferred By: \_\_\_\_\_

Received By: \_\_\_\_\_

**Transfer Requests**

Search Options: [Click here to make this your default Search](#)

Search For: 7/26/2024 By: Needed By Matching: Equal Search

AND For: 1WH South Surrey Ware By: To Location Matching: Equal

AND For: By: Model/Item # Matching: Equal

Model/Item	Serial #	Qty	From	To	Date Required	Created By	Invoice	Status	Job Status	Schedule Date	Batch Number
KRBL109ESS	00004	1	9WH	1WH	7/26/2024	L	RS00000175	Processing	FIRM	7/31/2024	TX-0719-1532-6Z
YWMC30516HZ	YW216354654	1	9WH	1WH	7/26/2024	L	RS00000002	Processing	FIRM	7/25/2024	TX-0719-1532-6Z
MK2160AZ	00001	1	9WH	1WH	7/26/2024	L	RS00000002	Processing	FIRM	7/25/2024	TX-0719-1532-6Z
WDF331PAMB	WD54689784	1	9WH	1WH	7/26/2024	L	RS00000002	Processing	FIRM	7/25/2024	TX-0719-1532-6Z
KDTE204KPS		1	9WH	1WH	7/26/2024	L		Processing			TX-0719-1532-6Z

Once the batch is generated, the status changes to "Processing" and the Batch Number is added to the screen.

Inventory Split Line Change Date Change Status Print Review Add Edit Delete Exit

**Generate the Batch Immediately and Print the Report**

**Transfer Requests**

Search Options: [Click here to make this your default Search](#)

Search For: 9WH Delta Warehouse By: From Location Matching: Equal Search

AND For: 1WH South Surrey Ware By: To Location Matching: Equal

AND For: 8/24/2024 By: Needed By Matching: Equal

Model/Item	Serial #	Qty	From	To	Date Required	Created By	Invoice	Status	Job Status	Schedule Date	Batch Number
KRBL109ESS	00005	1	9WH	1WH	8/24/2024	%1	RS00000187	Accepted	UNCONFIR...	8/13/2024	
ME21M708BAG		3	9WH	1WH	8/24/2024	%1		Accepted			

1 Print the transfer request and generate the batch. The transfer request will be used for shipping.

2 Fill in the From and To Location.

3 Fill in the date range.

4 Select the status.

**PO - Transfer Request**

From Location: 9WH Delta Warehouse

To Location: 1WH South Surrey Warehouse

Date From: 8/24/2024 To: 8/24/2024

Brand: Product: Status: Accepted

Page Break On: Location To

Sort By: Date Required

5 Make sure this option is selected to generate the batch immediately and print the report.

6 The batch will automatically generate behind the scenes when you click OK.

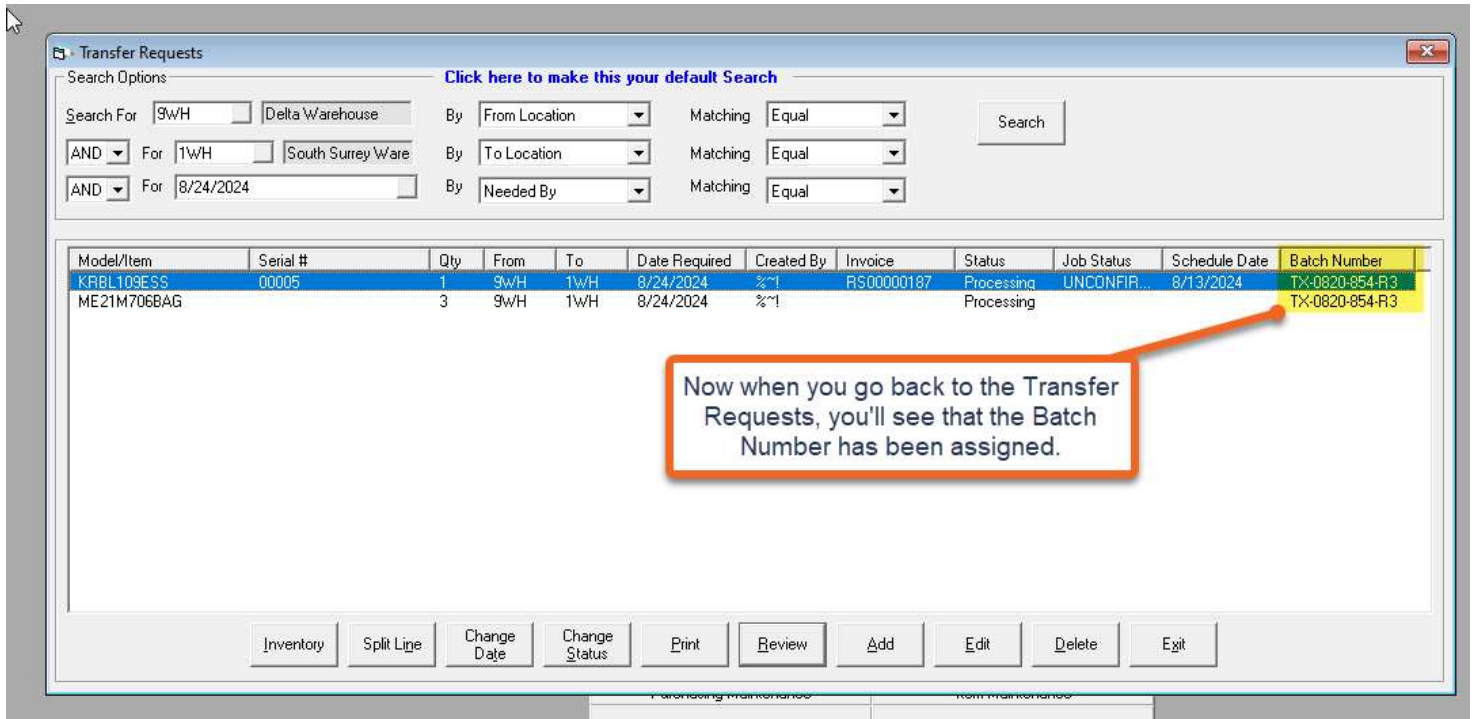
Print Review Add Edit

Add PO Customer Maintenance



The screenshot shows the 'Transfer Requests' window with search filters for '9WH', '1WH', and '8/24/2024'. A 'Print Setup' dialog is open, showing 'Microsoft Print to PDF' as the selected printer. An orange callout box points to the printer selection with the text: "Select the printer if it's not already defaulted and click OK." To the right, a 'PO - Transfer Request' dialog is also visible, showing location and date details.

This screenshot shows the 'Transfer Requests' window with the same search filters. A 'Save Print Output As' dialog is open, showing a file explorer view of the 'Test Docs' folder. The file name is '2024.08.24 9WH to 1WH' and the save type is 'PDF Document (\*.pdf)'. An orange callout box points to the 'Save' button with the text: "In this example, we are saving the report as a PDF document. Click Save." The file explorer shows a list of files and folders, including 'c-52442\_20240810 Invoice Cost Exceptions' and 'CTP Manager + CTP Download Invoice'.



Scan the Batch

Below is the batch that we are scanning:

**Batch Number:** TX-0719-1532-6Z

Model	Serial	Barcode
KRBL109ESS	00004	0W03UT474
YWMC30516HZ	YW216354654	135249Y7P
MK2160AZ	00001	T0022SL83
WDF331PAMB	WD54689784	2K796Q71I
KDTE204KPS	00003	18DDP0S92

**EPASS**  
WAREHOUSE MANAGEMENT

Select Transfer.

<b>Check Stock</b>	<b>Shipping</b>
<b>Return Shipping</b>	<b>Transfer</b>
<b>Receive Transfer</b>	<b>Assign to Bin</b>
<b>Receiving</b>	<b>Count Inventory</b>
<b>Update Serial</b>	<b>Bin Inquiry</b>
<b>Picking Report</b>	

 <b>Back</b>	 <b>Home</b>	 <b>Signout</b>
---	---	---

## Transfer

REGULAR (SERIAL)

BATCH (SERIAL)

ITEM INVENTORY

ITEM PREP

Select Batch (Serial).

← Back

🏠 Home

⊖ Signout

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## Batch Transfer

Batch #:(required)

TX-0719-1532-6Z

Scan the batch #  
and click OK.

OK

← Back

🏠 Home

⊖ Signout

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## Transfer

Scan/Type location or [Select From List](#)

Type, Scan or Select From List the Transfer Truck Location.

1TT|

OK

 Back

 Home

 Signout

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## Assign To Batch - TX-0719-1532-6Z

Barcode:(required)

18DDP0S92

Enter the barcode and click OK.  
You will be prompted for the next  
barcode until the transfer is  
complete.

OK

PRINT

 Back

 Home

 Signout

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## Assign To Batch - TX-0719-1532-6Z

Barcode:(required)

Enter the barcode and  
click OK.

0W03UT474

OK

PRINT

 Back

 Home

 Signout

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## Assign To Batch - TX-0719-1532-6Z

Barcode:(required)

135249Y7P

Enter the barcode and  
click OK.

OK

PRINT

 Back

 Home

 Signout

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## Assign To Batch - TX-0719-1532-6Z

Barcode:(required)

T0022SL83

Enter the barcode and  
click OK.

OK

PRINT

 Back

 Home

 Signout

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## Assign To Batch - TX-0719-1532-6Z

Barcode:(required)

2K796Q71I

Enter the barcode and click OK.

OK

PRINT

 Back

 Home

 Signout

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## Batch Transfer

Batch #:(required)

Once the transfer is complete, you will be prompted for the next batch #.

OK

Back

Home

Signout

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### Transfer Requests Screen

The serials have now been transferred to the truck. See the "Transfer Requests" screen.

**Transfer Requests**

Search Options: [Click here to make this your default Search](#)

Search For:  By:  Matching:

For:  By:  Matching:

For:  By:  Matching:

Model/Item	Serial #	Qty	From	To	Date Required	Created By	Invoice	Status	Job Status	Schedule Date	Batch Number
KRBL109ESS	00004	1	1TT	1WH	7/26/2024	L	RS00000175	Transferred	FIRM	7/31/2024	TX-0719-1532-6Z
YWMC30516HZ	Yw216354654	1	1TT	1WH	7/26/2024	L	RS00000002	Transferred	FIRM	7/25/2024	TX-0719-1532-6Z
MK2160AZ	00001	1	1TT	1WH	7/26/2024	L	RS00000002	Transferred	FIRM	7/25/2024	TX-0719-1532-6Z
WDF331PAMB	WD54689784	1	1TT	1WH	7/26/2024	L	RS00000002	Transferred	FIRM	7/25/2024	TX-0719-1532-6Z
KDTE204KPS		1	1TT	1WH	7/26/2024	L		Transferred			TX-0719-1532-6Z

The "From" has changed to the transfer truck location (1TT)

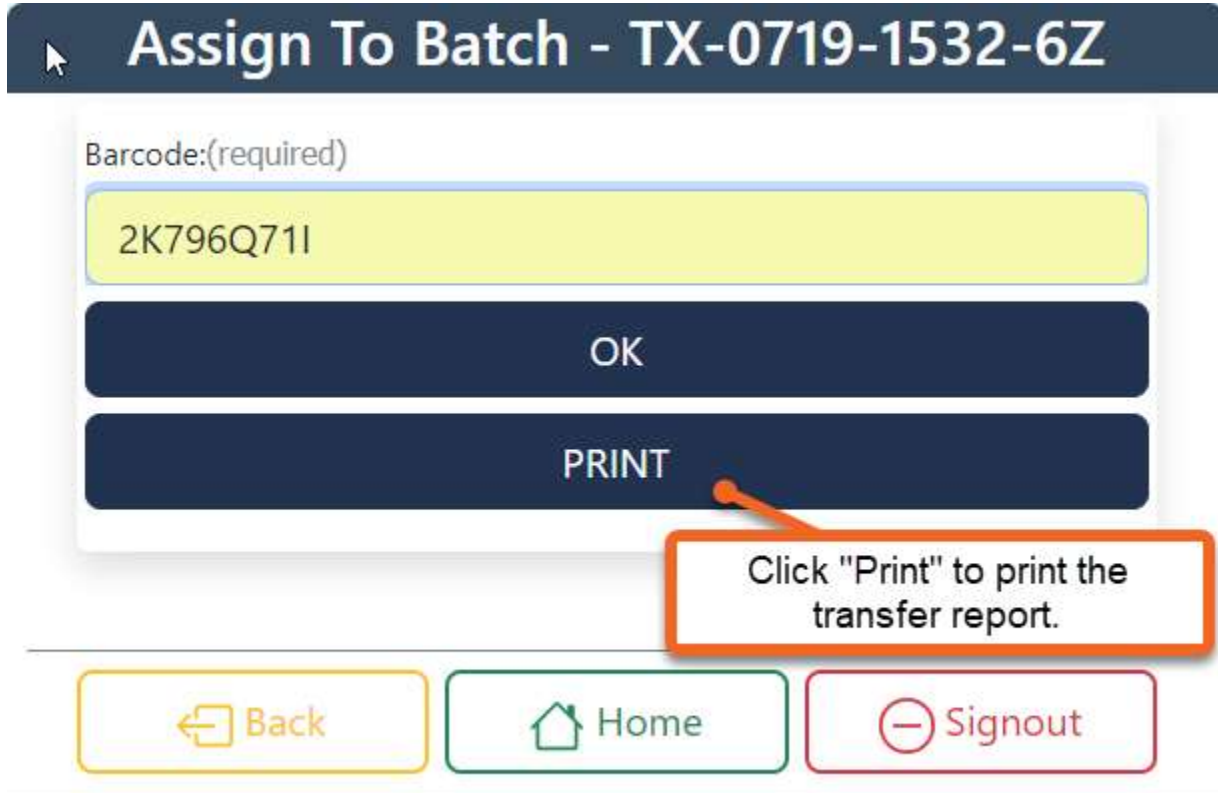
The "Status" has changed to "Transferred".

Inventory Split Line Change Date Change Status Print Review Add Edit Delete Exit

Print the WI-01 Transfer Report

Use this report to confirm the transfer. There are 2 ways that you can print this report:

Print from Scan Gun



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Print from EPASS

The screenshot shows the EPASS software interface. The 'Serial Inventory' menu is open, and the 'Wireless Inventory' sub-menu is selected. The 'Print Transfer Report' option is highlighted. A callout box with a blue circle containing the number '1' points to this option and contains the text: "Go to Serial Inventory > Wireless Inventory > Print Transfer Report." Below the menu, the 'Transfer Requests' window is visible, showing search options for 'TX-0719-1532-6Z'. A 'Print Transfer Report' dialog box is open, with the text 'Enter Batch Number' and a text input field containing 'TX-0719-1532-6Z'. A callout box with a blue circle containing the number '2' points to the input field and contains the text: "Enter the Batch Number and click OK." The dialog box also has 'OK' and 'Cancel' buttons.

*Andersons Appliances*  
**Inventory Transfer Report**

WI-01



Transfer From: 9WH      Transfer To: 1TT      Batch Number: TX-0719-1532-6Z

Date: Aug 07/2024      Time: 4:12 pm      Page: 1

Model	Serial	BO Invoice	Date Scanned	Time Scanned
* Models with an asterisk were scanned but not updated. This product must be manually transferred.				
KDTE204KPS	00003		8/7/2024	12:00:0 03:55:00 PM
KRBL109ESS	00004	RS00000175	8/7/2024	12:00:0 03:55:14 PM
YWMC30516HZ	YW216354654	RS00000002	8/7/2024	12:00:0 03:55:29 PM
MK2160AZ	00001	RS00000002	8/7/2024	12:00:0 03:55:42 PM
WDF331PAMB	WD54689784	RS00000002	8/7/2024	12:00:0 03:56:12 PM

Number of Pieces: 5

Loaded By: \_\_\_\_\_  
 Transferred By: \_\_\_\_\_  
 Received By: \_\_\_\_\_

Receive the Transfer

The destination location will receive the transfer.

**EPASS**  
WAREHOUSE MANAGEMENT

<b>Check Stock</b>	<b>Shipping</b>
<b>Return Shipping</b>	<b>Transfer</b>
<b>Receive Transfer</b>	<b>Assign to Bin</b>
<b>Receiving</b>	<b>Count Inventory</b>
<b>Update Serial</b>	<b>Bin Inquiry</b>
<b>Picking Report</b>	<b>Select Receive Transfer.</b>

 <b>Back</b>	 <b>Home</b>	 <b>Signout</b>
---	---	--



## Receive Transfer

Batch #:(Required)

TX-0719-1532-6Z

Enter / Scan the  
Batch # and click  
OK.

OK

← Back

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⊖ Signout

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## Transfer

Scan/Type location or [Select From List](#) Scan / Type / Select the location and click OK.

OK

[← Back](#) [Home](#) [Signout](#)

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## Assign To Batch - TX-0719-1532-6Z

Barcode:(required)

Scan the barcode.

0W03UT474|

OK

PRINT

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## Assign To Batch - TX-0719-1532-6Z

Barcode:(required)

Scan the barcode.

135249Y7P

OK

PRINT

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## Assign To Batch - TX-0719-1532-6Z

Barcode:(required)

Scan the barcode.

T0022SL83 |

OK

PRINT

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# Assign To Batch - TX-0719-1532-6Z

Barcode:(required)

Scan the barcode.

2K796Q71I

OK

PRINT

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## Assign To Batch - TX-0719-1532-6Z

Barcode:(required)

Scan the barcode.

18DDP0S92 |

OK

PRINT

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Transfer Requests

Search Options [Click here to make this your default Search](#)

Search For TX-0719-1532-6Z

By Batch # Matching Start of Field Search

AND For [ ] By Model/Item # Matching Equal

AND For [ ] By Model/Item # Matching Equal

Model/Item	Serial #	Qty	From	To	Date Required	Created By	Invoice	Status	Job Status	Schedule Date	Batch Number
KRBL109ESS	00004	1	1TT	1WH	7/26/2024	L	RS00000175	Completed	FIRM	7/31/2024	TX-0719-1532-6Z
YWMC30516HZ	YW216354654	1	1TT	1WH	7/26/2024	L	RS00000002	Completed	FIRM	7/25/2024	TX-0719-1532-6Z
MK2160AZ	00001	1	1TT	1WH	7/26/2024	L	RS00000002	Completed	FIRM	7/25/2024	TX-0719-1532-6Z
WDF331PAMB	WD54689784	1	1TT	1WH	7/26/2024	L	RS00000002	Completed	FIRM	7/25/2024	TX-0719-1532-6Z
KDTE204KPS		1	1TT	1WH	7/26/2024	L		Completed			TX-0719-1532-6Z

The status "Completed" indicates that the transfer has been received.

Inventory Split Line Change Date Change Status Print Review Add Edit Delete Exit

What happens if the serial has already been spoken for?

## Assign To Batch - TX-0908-229-0X

SERIAL SPOKEN FOR  
MDL:NE63T87115G  
SRL:00001  
PO: RS7  
BO#:US00000003-2

Barcode:(required)

OK

PRINT

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When you transfer the serial, this is when you know that serial is unavailable.

## Item

### Item Inventory

The purpose of Item Inventory is to transfer an item from one location to another. There are a couple of different ways that you can transfer items: EPASS and Scan Gun.



*Manual Transfer*  
Single Item

The screenshot shows the EPASS software interface. The 'Item Inventory' menu is open, and the 'Transfer' option is selected. The 'Transfer Item' dialog box is displayed, showing the 'Single Item Transfer' tab. The dialog box contains the following fields:

Field	Value
Item #	11038677
From Location	Main Stock
QOH	44
New QOH	39
To Location	1SV
QOH	0
New QOH	5
Qty to Transfer	5

Annotations in the image include:

- 1: Go to Item Inventory > Transfer.
- 2: Fill in the highlighted fields.
- 3: Click OK to proceed.

1 Go to Item Inventory > Maintenance.

2 Select the item.

3 Click Location.

4 Double check that the item quantity has been transferred.

* Item	Brand	Prod	Description	Main	Loc	Bin	List	Avg Cost	Barcode	SKU	Equivalent
0001	XX	ACC	Membership Package	0	0		0.00	0.00			
10011767	BOS	PARTS	232323	0	0	A01	0.00	0.00			232323
▶ 11038677	BOS	PARTS	Door Hinge	39	10	A07	137.61	91.64			
232323	MAY	DWB	Drain Pump	2	0	A02	0.00	29.95			
341241	MAY				12	A01	0.00	0.00			
343434	MAY				5	A02	0.00	1252.00			

* Code	Description	Start	Min	Max	YTD	Last YTD	Bin Location
	Main Stock	39	0	0	5	0	A07
▶ TSV	South Surrey Service	5	0	0	0	0	
4SV	Ottawa Service	0	0	0	0	0	
5SV	Delta Service	8	0	0	0	0	
9wH	Delta Warehouse	-4	0	0	3	0	
T1	Jason's Truck	1	0	0	0	0	

### Bulk Item

To transfer a few items, select the tab “Bulk Item Transfer” from the “Transfer Item” screen.

1 Click Bulk Item Transfer.

2 Enter the From and To Location

3 Select the location of the file. These are the items listed on the spreadsheet.

4 Click OK to proceed.

	A	B	C
1	Item	Qty	
2	11038677	8	
3	343434	5	
4	341241	12	
5			
6			
7			
8			

OK

Cancel

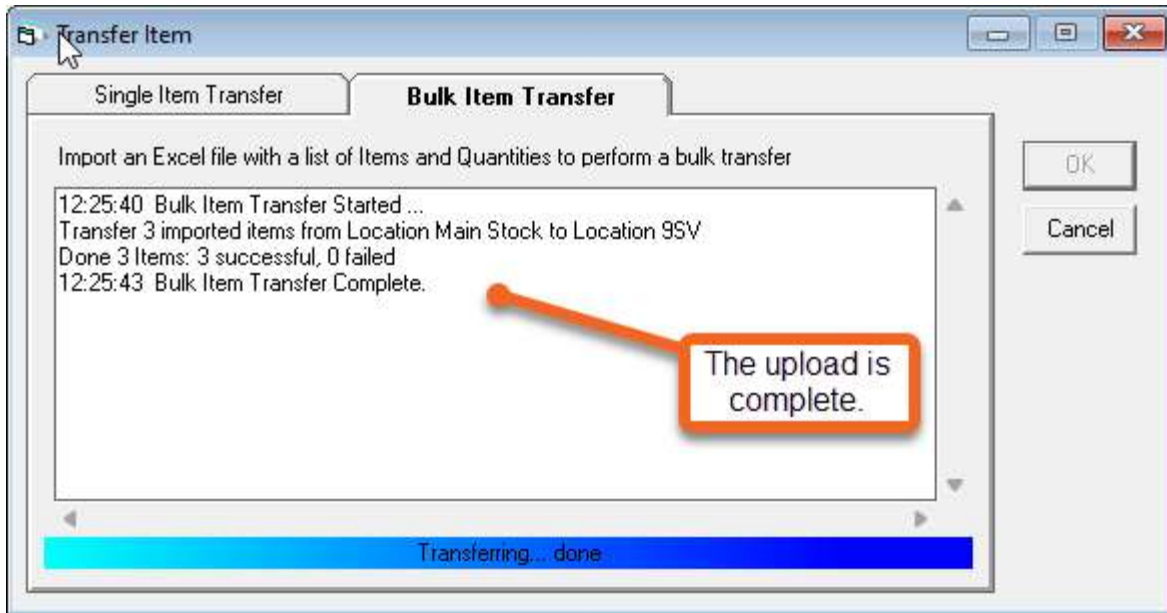
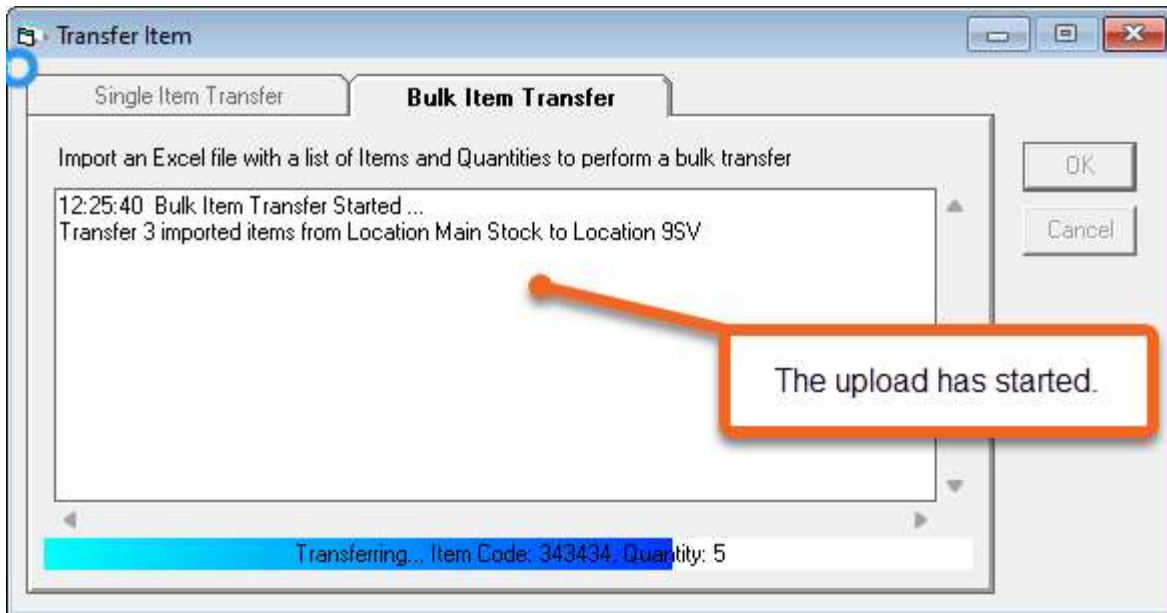
PASS

The file was successfully imported and the transfer can now begin.

Are you sure you want to transfer 3 Items from location Main Stock to 9SV?

Yes No

You will be prompted to double check before uploading the spreadsheet. Click OK to proceed.



**Location for Item 11038677, Door Hinge**

* Code	Description	QOH	Min	Max	YTD	Last YTD	Bin Location
	Main Stock	44	0	0	5	0	A07
1SV	South Surrey Service	0	0	0	0	0	
4SV	Ottawa Service	0	0	0	0	0	
8SV	Delta Service	0	0	0	0	0	
9WH	Delta Warehouse	-4	0	0	3	0	
T1	Jason's Truck	1	0	0	0	0	

**Location for Item 343434, control board**

* Code	Description	QOH	Min	Max	YTD	Last YTD	Bin Location
	Main Stock	20	0	0	1	0	A02
8SV	Delta Service	5	0	0	0	0	
9WH	Delta Warehouse	0	0	0	0	0	

**Location for Item 341241, belt**

* Code	Description	QOH	Min	Max	YTD	Last YTD	Bin Location
	Main Stock	13	0	0	0	0	A01
8SV	Delta Service	12	0	0	0	0	
9WH	Delta Warehouse	0	0	0	0	0	

**Item Inventory**

Search For: 11038677

Item List: 0-3, 4-6, 7-9, A-C, D-F, G-I, J-L, M-O, P-R, S-U

**Equivalent**

232323

**Callout:** Double check the item inventory to ensure that the quantities were uploaded correctly.

Scan Gun Transfer



Select Transfer.

<b>Check Stock</b>	<b>Shipping</b>
<b>Return Shipping</b>	<b>Transfer</b>
<b>Receive Transfer</b>	<b>Assign to Bin</b>
<b>Receiving</b>	<b>Count Inventory</b>
<b>Update Serial</b>	<b>Bin Inquiry</b>
<b>Picking Report</b>	

<b>Back</b>	<b>Home</b>	<b>Signout</b>
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## Transfer

REGULAR (SERIAL)

BATCH (SERIAL)

ITEM INVENTORY

ITEM PREP

Select Item  
Inventory.

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⊖ Signout

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## Item Transfer Location

**FROM**

Select From List or **Scan/Type** Location

- Main Stock

**TO**

Select From List or **Scan/Type** Location

2SV - Richmond Service

Select / Scan / Type the From and To Location.

OK

 Back

 Home

 Signout



## Transfer Item From Main To 2SV

ITEM#:(required)

11038677

QTY:(required)

2

Enter the Item # and Qty. Click  
OK.

OK

 Back

 Home

 Signout

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## Transfer Item From Main To 2SV

OK

ITEM#:(required)

QTY:(required)

1

OK

Continue entering the items that you want transferred and click OK.

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 Home

 Signout

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## Transfer Item From Main To 2SV

OK

ITEM#:(required)

341241

QTY:(required)

5

Enter the item # and qty. Click OK.

OK

 Back

 Home

 Signout

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## Transfer Item From Main To 2SV

OK

ITEM#:(required)

|

QTY:(required)

1

OK

 Back

 Home

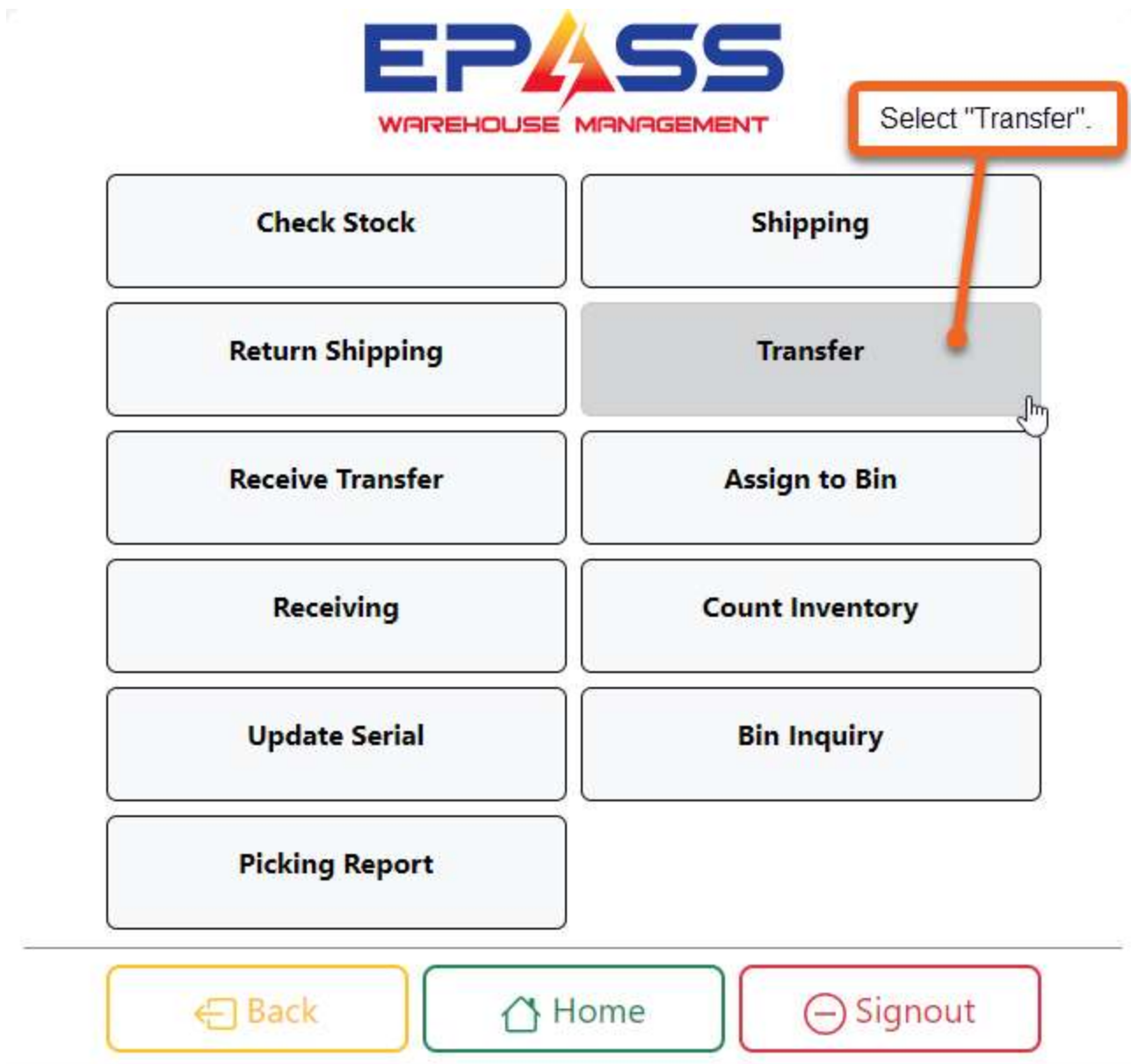
 Signout

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Click Home or Signout  
when you're done.



**Note:** Item Prep and Item Inventory Transfer serve two different functions and therefore, you cannot use the “Item Inventory” function to transfer the item into the technician’s truck as the item is already committed and no longer sitting in inventory.



## Transfer

REGULAR (SERIAL)

BATCH (SERIAL)

ITEM INVENTORY

ITEM PREP

Select "Item Prep".

← Back

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⊖ Signout

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## Item Prep

Invoice #:(required)

Enter the invoice number.

SV00060265|

OK

← Back

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# Item Prep

**INVOICE#:** SV00060265

Enter the item #.

**ITEM#:**(required)

11038677

Ok

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⊖ Signout

# Item Prep

**INVOICE#:** SV00060265

**ITEM#:** 11038677

**FROM LOCATION**

Select From List or **Scan/Type** Location

- Main Stock

Enter the "From Location" or choose it from a drop down list on the scan gun.

Ok

 Back

 Home

 Signout

## Item Prep

**INVOICE#:** SV00060265

**ITEM#:** 11038677

**LOCATION FROM:** MAIN

**TO LOCATION**

Select From List or Scan/Type Location

- Main Stock

- 2TT - Richmond Transfer Truck
- 2WH - Richmond Warehouse
- 3CL - Calgary Clearance
- 3SH - Calgary Showroom
- 3SV - Calgary Service
- 3TT - Calgary Transfer Truck
- 3WH - Calgary Warehouse
- 4CL - Ottawa Clearance
- 4SH - Ottawa Showroom
- 4SV - Ottawa Service
- 4TT - Ottawa Transfer Truck
- 4WH - Ottawa Warehouse
- 9SV - Delta Service
- 9TT - Delta Transfer Truck
- 9WH - Delta Warehouse
- MA - Melissa's Truck
- T1 - Jason's Truck
- T2 - Ryan's Truck

Select "To Location" from the drop down list.

# Item Prep

**INVOICE#:** SV00060265

**ITEM#:** 11038677

**LOCATION FROM:** MAIN

**TO LOCATION**

Select From List or **Scan/Type** Location

T2 - Ryan's Truck

Click OK to proceed.  
The Invoice Item  
Location is now  
updated.

Ok

← Back

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⊖ Signout

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# Item Prep

Invoice #:(required)

If you have more items to prep, enter the invoice number and repeat the steps again.

OK

Back

Home

Signout

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Type	Pack	Item	Loc	Description	Qty	Amount	V/v	Tax	Status	QOH
Labor	No	MA		Melissa	0	249.00	No	NNN		
Item	No	11038677	T2	Door Hinge	1	137.61	No	NY	Committed	0/25
Item	No	11038677	T2	Door Hinge	1	137.61	No	NY	Committed	0/49
Item	No	11038677	T2	Door Hinge	2	275.22	No	NY	Committed	52/...
Payment	No	VISA		45651231	0	925.48	No	NY	Open	
Misc	No	CCUCP		DC Upcharge Fee	1	26.96	No	NNN		

3 The staff preps the item by moving it from Main Stock to the shelf for the technician. On the scan gun, they use the "Item Prep" function. This only updates the InvoiceItem.LocationCode.  
**Note:** You can only use "Item Prep" function on items that are in "Committed" status only.

2 Once you enter the item onto the invoice, it automatically ships the item out of its inventory location (Main Stock) and changes the status to "Committed".

1 Enable this option to auto commit items in invoicing.

## Transfer Search

### Purpose

The Wireless Inventory – Activity screen allows you to search for transfers, receiving, shipping, update serial and assign to bin. We will look at how to search for transfers and print the transfer report.

### Search

1. Go to Serial Inventory > Wireless Inventory > Activity
2. Search by: Batch Number, User ID, Model, Serial
3. Search by Batch Number in the example below.
4. Select the date range.
5. Select the checkbox “Transfers”.
6. Print Transfer Report (WI-01)

The screenshot shows the 'Wireless Inventory - Activity' window. The search options are configured as follows:

- Search For: TX-0719-1532-6Z
- By: Batch Number
- Matching: Start of Field
- Show Activity From: 8/7/2024 To: 8/7/2024
- Transfers:

The activity table contains the following records:

Action	Batch	Date	Time	Model	Serial	From	To	OK	Note	User	B
Transfer	TX-0719-1532-6Z	08-07-2024	03:55:00 PM	KDTE204KPS	00003	9wH	1TT		BatchTransfer	%*1	1:
Transfer	TX-0719-1532-6Z	08-07-2024	03:55:14 PM	KRBL109ESS	00004	9wH	1TT		BatchTransfer	%*1	0:
Transfer	TX-0719-1532-6Z	08-07-2024	03:55:29 PM	YwMC30516HZ	Yw216354654	9wH	1TT		BatchTransfer	%*1	1:
Transfer	TX-0719-1532-6Z	08-07-2024	03:55:42 PM	MK2160AZ	00001	9wH	1TT		BatchTransfer	%*1	T
Transfer	TX-0719-1532-6Z	08-07-2024	03:56:12 PM	WDF331PAMB	WD54689784	9wH	1TT		BatchTransfer	%*1	2:

At the bottom of the window, the 'Record Count' is 5, and the 'Print Transfer Report' button is highlighted.

## Print Transfer Report (WI-01)

Wireless Inventory - Activity

Search Options [Click here to make this your default Search](#)

Search For: TX-0719-1532-6Z By: Batch Number Matching: Start of Field Search

AND For: By: Batch Number Matching: Start of Field

Show Activity From: 8/7/2024 To: 8/7/2024 Location From: Location To:

Receiving  Shipping  Update Serial  Transfers  Assign To Bin  Only Show Exceptions

Action	Batch	Date	Time	Model	Serial	From	To	OK	Note	User	Barcode ID
Transfer	TX-0719-15...	08-07-2024	03:55:00 PM	KDTE204KPS	00003	9WH	1TT		BatchTransfer	%~!	18DDP0S92
Transfer	TX-0719-15...	08-07-2024	03:55:14 PM	KRBL109ESS	00004	9WH	1TT		BatchTransfer	%~!	0w03UT474
Transfer	TX-0719-15...	08-07-2024	03:55:29 PM	YWMC30516HZ	YW216354654	9WH	1TT		BatchTransfer	%~!	135249Y7P
Transfer	TX-0719-15...	08-07-2024	03:55:42 PM	MK2160AZ	00001	9WH	1TT		BatchTransfer	%~!	T0022SL83
Transfer	TX-0719-15...	08-07-2024	03:56:12 PM	WDF331PAMB	WD54689784	9WH	1TT		BatchTransfer	%~!	2K796Q71I

Record Count: 5

Export Print Labels **Print Transfer Report** Print Activity Receive Delete Exit

Print Transfer Report

Enter Batch Number

TX-0719-1532-6Z

OK Cancel

Click OK.

Click Print Transfer Report. The Batch Number is automatically filled in as this is the only number on the screen.

3

*Andersons Appliances*  
**Inventory Transfer Report**

WI-01



Transfer From: 9WH      Transfer To: 1TT      Batch Number: TX-0719-1532-6Z  
Date: Aug 20/2024      Time: 8:28 pm      Page: 1

Model	Serial	BO Invoice	Date Scanned	Time Scanned
* Models with an asterisk were scanned but not updated. This product must be manually transferred.				
KDTE204KPS	00003		8/7/2024 12:00:0	03:55:00 PM
KRBL109ESS	00004	RS00000175	8/7/2024 12:00:0	03:55:14 PM
YWMC30516HZ	YW216354654	RS00000002	8/7/2024 12:00:0	03:55:29 PM
MK2160AZ	00001	RS00000002	8/7/2024 12:00:0	03:55:42 PM
WDF331PAMB	WD54689784	RS00000002	8/7/2024 12:00:0	03:56:12 PM
KRBL109ESS	00004	RS00000175	8/8/2024 12:00:0	04:41:33 PM
YWMC30516HZ	YW216354654	RS00000002	8/8/2024 12:00:0	04:41:49 PM
MK2160AZ	00001	RS00000002	8/8/2024 12:00:0	04:42:03 PM
WDF331PAMB	WD54689784	RS00000002	8/8/2024 12:00:0	04:42:24 PM
KDTE204KPS	00003		8/8/2024 12:00:0	04:42:45 PM

Number of Pieces: 10

Loaded By: \_\_\_\_\_

Transferred By: \_\_\_\_\_

Received By: \_\_\_\_\_