

Transferring Inventory Between Stores Using Restaurant Management

Inventory: Transfers

From the **Inventory** module of *Restaurant Management*, use the **Transfers** section to transfer inventory items between stores.

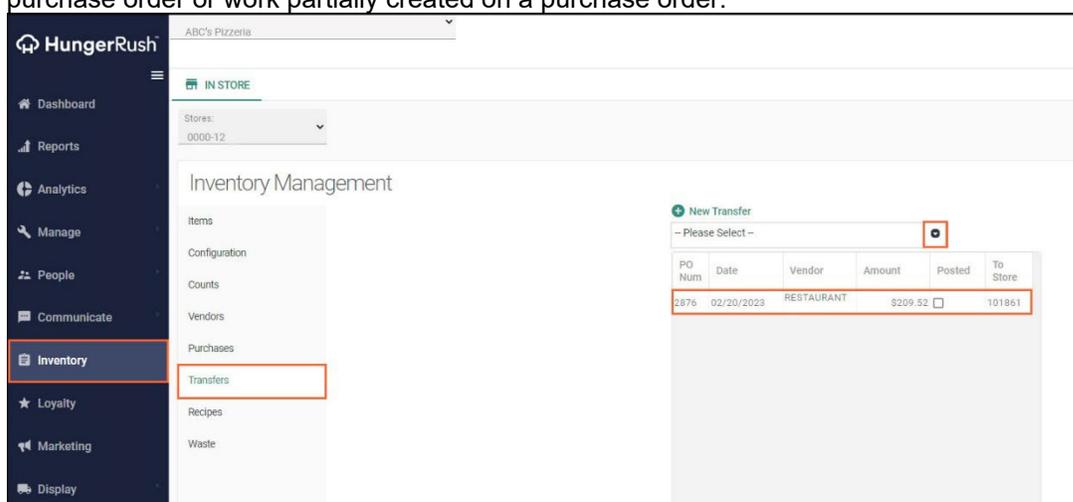
The **Transfers** section of the Inventory module allows users to create records of inventory products moving between stores. When a Transfer Purchase Order is created, *Restaurant Management* automatically removes the specified quantity of items from the On Hand Inventory calculations and creates a purchase order in the receiving store for the quantities of the items.

Transferring Inventory to Another Store: Previously Created Purchase Order

Follow the steps below to create an inventory transfer to another store, using a previously created purchase order, or purchase order in progress.

Steps

1. From *Restaurant Management*, click the **Inventory** module. The *Inventory Management* screen displays.
2. Use the **Store drop-down** to select the store location you want to transfer inventory from, that will be transferred to another store.
3. From the *Inventory Management* screen, click **Transfers**. The *Transfers* screen displays.
4. From the *Transfers* screen, use the **Transfer Order drop-down** to select a previously created purchase order or work partially created on a purchase order.



5. Click **Save**.

Transferring Inventory to Another Store: New Transfer Purchase Order

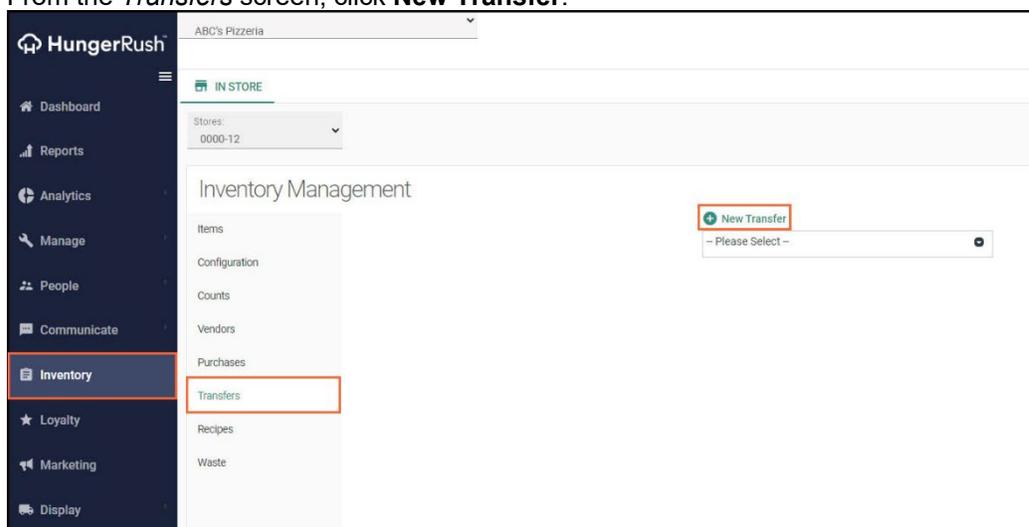
Follow the steps below to create a new transfer of inventory to another store.

Steps

1. From *Restaurant Management*, click the **Inventory** module. The *Inventory Management* screen displays.
2. From the *Inventory Management* screen, click **Transfers**. The *Transfers* screen displays.
3. Use the **Store drop-down** to select the store location you want to transfer inventory from, that will be transferred to another store.

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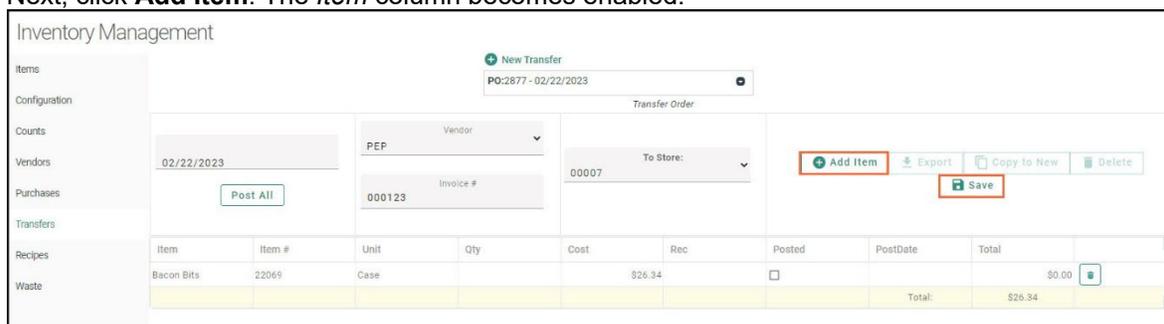
4. From the *Transfers* screen, click **New Transfer**.



5. The *New Transfer grid* displays for you to enter the details of your inventory item, including the store location you want to transfer the inventory to. These fields include:

- **Date** – Enter the date you want to transfer the inventory.
- **Vendor** – Use the drop-down to select the appropriate vendor of the inventory item.
- **Invoice #** -- Manually enter an invoice number from the vendor.
- **To Store:** -- Use the drop-down to select the store location that will receive the products being transferred.

6. Next, click **Add Item**. The *Item* column becomes enabled.



7. Use the **Item** drop-down to select the inventory item you want to transfer. Double-click the Item selection to see other items populate in the grid view, such as quantity and cost.

8. Edit the quantity and any other fields in the grid.

9. Use the **Add Item** button to add additional inventory items to the purchase order.

10. When finished, click **Save** to complete the new transfer/new purchase order.



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Additional Field Definitions

UnPost All – Click UnPost All to remove the post checkmark or and the post date for all items.

Export – Click Export to generate a PDF file of the purchase order.

Copy to New – Click Copy To New to create a duplicate Purchase order for quick and easy re-ordering.

Delete – Click Delete Purchase Order to delete the entire PO.

Save – Click Save to save all changes to a Purchase Order.

Note: The Save button will not be active until all values are entered for a new item.

Item # -- The Item Number Column shows the associated item number based on the vendor. This will auto-populate when the item is selected.

Unit – The Unit Column shows the Order By Unit for each item. This will auto-populate when the item is selected.

Qty – Enter the Quantity ordered for each item on the PO.

Cost – The Cost Column shows the cost of each item ordered on this purchase order. Update this value as needed. It will auto-populate to the default price entered in the items screen.

Rec – Enter the Quantity Received for each item.

Posted – When the vendor delivers the order, check the Posted option to show that the items have been received and should reflect in on-hand values.

PostDate – The Post Date should be the date that the inventory shipment is received from the vendor in store. This value is referenced for all usage and purchase reports.

Item Total – The Item Total shows the total line item cost of item quantity and item price.

Total – The Total shows the total cost of all line items for the purchase order.

Delete Item (located in the grid) – Click Delete Item to remove an individual item from the purchase order.