

## Chapter 9 - Transfer/Deliver/Loan Inventory – INVTRAN & MISCTRAN

### ***Moving inventory from one location to another***

To move inventory from one location to another within the system, follow these procedures. Select the option Transfer Inventory Locations off your Inventory Menu or press the F10 key and at the command line type in "INVTRAN" and then press the ENTER key. On some systems to transfer inventory locations select the option on the Main Menu that says Inventory Functions, then go into Inventory Transfer/Deliver/Demo.

**Note: It is very important that any time you move an inventory item from one location to another that you print a transfer receipt.**

The screen you will see will prompt you for the "Printer or File Pathname", see Figure 9-1. See [Chapter 10 Introduction to Reports](#) for additional information about the printer/file pathname screen. Enter the correct information or press the ENTER key if you want the transfer receipts to print out at the default printer. You will then be prompted "Print Test Transfer".

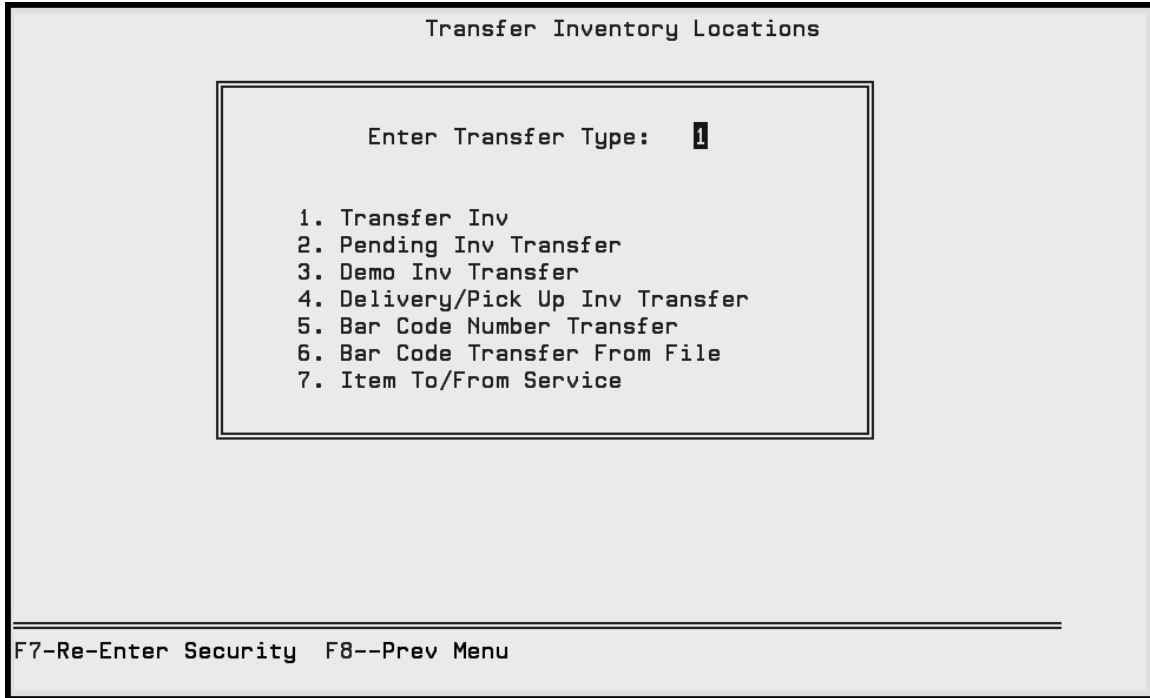
```
Transfer Serialized Inventory Locations
Printer or File Pathname: LP01

Print Test Transfer?: N

File Pathname up to 29 Characters
```

**Figure 9-1 Transfer Serialized Inventory Locations Screen**

Type in a Y for yes and it will print a test: (this is to help you align the receipt). Type N for no or press the ENTER key and the system will display a screen similar to Figure 9-2. Enter the number corresponding to the type of transfer you wish to make.



**Figure 9- 2 Transfer Inventory Locations Screen**

- 1 TRANSFER INV** Transfers inventory from location to location such as store to store or warehouse.
- 2 PENDING INV TRANSFER** Transfers inventory from pending sales or rental locations. This is commonly used to hold inventory until it is ready to be delivered for a sale or rental.
- 3 DEMO INV TRANSFER** For Demo's, Loaners. Transfers inventory to and from a demo/loaner location and designates customer on the inventory piece. This is commonly used when an item is sent as a loaner, a customer is trying an item in a trial use situation or you are donating the use of an item for a period of time.
- 4 DELIVERY/PICK UP INV TRANSFER** This is used to assign stock or special order sales serial numbers or MISC when they are delivered to or picked up by the customer.
- 5 BAR CODE NUMBER TRANSFER** Transfers inventory using bar code equipment.  
**Requires optional software module and optional hardware.**
- 6 BAR CODE TRANSFER FROM FILE** Transfers inventory from portable bar code equipment to a file. **Requires optional software module and optional hardware.**
- 7 Item To/From Service** This is used to transfer to and from Service locations

### ***Transfer Inventory (Transfer Type Option 1)***

To transfer inventory, select option 1, Inv Transfer from the Transfer Inventory Location Screen, see Figure 9-2. The cursor will now be resting on Old Location. Enter the location number where the inventory is coming from (4 characters, example 0001). If you don't know the location number, press the ENTER key and you will see a window showing options you may choose from, see Figure 9-3.

Inventory Transfer Of Location																													
Old Location:	0	New Location:	0																										
		Transfer Date:	11/22/06																										
<table border="1" style="width: 100%; border-collapse: collapse;"> <tbody> <tr><td>RSSS APPLIANCES</td><td style="text-align: right;">0</td></tr> <tr><td>RSSS APPLIANCES #1</td><td style="text-align: right;">1</td></tr> <tr><td>RSSS APPLIANCES #2</td><td style="text-align: right;">2</td></tr> <tr><td>RSSS APPLIANCES #3</td><td style="text-align: right;">3</td></tr> <tr><td>RSSS APPLIANCES #4</td><td style="text-align: right;">4</td></tr> <tr><td>RSSS APPLIANCES #5</td><td style="text-align: right;">5</td></tr> <tr><td>RSSS APP WAREHOUSE</td><td style="text-align: right;">6</td></tr> <tr><td>RSSS APP SERVICE CENTER</td><td style="text-align: right;">7</td></tr> <tr><td>OTHER LOCS</td><td style="text-align: right;">99</td></tr> <tr><td>DEMO/LOANER LOC</td><td style="text-align: right;">501</td></tr> <tr><td>DEMO/LOANER LOC</td><td style="text-align: right;">502</td></tr> <tr><td>DEMO/LOANER LOC</td><td style="text-align: right;">503</td></tr> <tr><td>DEMO/LOANER LOC</td><td style="text-align: right;">504</td></tr> </tbody> </table>				RSSS APPLIANCES	0	RSSS APPLIANCES #1	1	RSSS APPLIANCES #2	2	RSSS APPLIANCES #3	3	RSSS APPLIANCES #4	4	RSSS APPLIANCES #5	5	RSSS APP WAREHOUSE	6	RSSS APP SERVICE CENTER	7	OTHER LOCS	99	DEMO/LOANER LOC	501	DEMO/LOANER LOC	502	DEMO/LOANER LOC	503	DEMO/LOANER LOC	504
RSSS APPLIANCES	0																												
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RSSS APPLIANCES #2	2																												
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Current Inventory Location																													
<table style="width: 100%; border: none;"> <tr> <td style="width: 25%;">F1-Forward</td> <td style="width: 25%;">F2-Back</td> <td style="width: 25%;">F10-Exit</td> <td style="width: 25%;">ENTER-Select</td> </tr> </table>				F1-Forward	F2-Back	F10-Exit	ENTER-Select																						
F1-Forward	F2-Back	F10-Exit	ENTER-Select																										

**Figure 9- 3 Inventory Transfer of Location Screen**

After selecting the Old Location, the cursor will now be on New Location. Type in the location you want to transfer the inventory to. Enter the date of transfer or press the ENTER key to accept today's date. The screen will then prompt "Any Changes". If you need to make changes, do so. If not, press the ENTER key. The cursor will now be beside "Transfer Notes". See Figure 9-4.



Inventory Transfer Of Location		
Old Location: 2	New Location: 1	Transfer Date: 11/22/06
RSSS APPLIANCES #2	RSSS APPLIANCES #1	
Serial Numbers:	█	
F1-List Inv		F9-Done

**Figure 9- 5 Inventory Transfer of Location Screen**

Type in or scan the serial number. If you do not know the serial number, press the F1 key to list the available inventory. Go to [Chapter 8 – Inquiring on Inventory pages 1-2](#) for different ways to search inventory.

The system will display the serial number on the Inventory Transfer of Location Screen. Press the ENTER key. The system will then display the description, location and status of this piece of inventory and the cursor will be on the bottom of the screen next to the prompt “Transfer This Item” as seen in Figure 9-6.

Inventory Transfer Of Location				
Old Location:	2	New Location:	1	Transfer Date: 11/22/06
	RSSS APPLIANCES #2		RSSS APPLIANCES #1	
Serial Numbers:	FGR3002636	MICROWAVE	2	N
Transfer This Item: <input type="checkbox"/> N				
F1-List Inv				F9-Done

**Figure 9- 6 Inventory Transfer of Location Screen**

If this is not the item you wish to transfer, type in an N for no. This will then take you back to the serial number prompt. If it is the right item, type in a Y for yes. When you answer this prompt with a Y for yes, the cursor will go below the serial number you just entered. If you need to transfer more inventory, enter the serial numbers (15 transfers maximum per screen).

When you have no other transfers to make from this location to this particular new location, press the F9 key. The receipt from this transfer will print out. You will then be prompted to "Print Another Receipt". If you want another receipt, press Y for yes. When you have printed all the receipts you want, press N for no at this prompt and the system will return you to the Transfer Notes prompt. If you still have other transfers to make, but need to change the Old or New Location, press the F8 key. This will take you back up to the Old Location.

### **Transferring Inventory to a Charge Off Location (Option 1)**

To transfer inventory to a charge off location, you will use option 1, Transfer Inv.

**Note: You MUST transfer to a location that was setup as a charge off location in Location Maintenance (LOCMNT).**

The cursor will now be resting on Old Location. Enter the location number where the inventory currently exists (4 characters, example 0001). If you don't know the location number, press the ENTER key and you will see a window showing options you may choose from. The cursor will now be on New Location. Enter the charge off location. If you do not know the charge off location number, blank out the New Location field and make a selection from the window. See Figure 9-7.

Inventory Transfer Of Location																												
Old Location: 2 RSSS APPLIANCES #2	New Location: 0	Transfer Date: 11/22/06																										
<table border="1" style="margin: auto; border-collapse: collapse;"> <tbody> <tr><td>SKIP/STOLEN LOC</td><td style="text-align: right;">706</td></tr> <tr><td>CHARGE OFF LOCATION</td><td style="text-align: right;">801</td></tr> <tr><td>CHARGE OFF LOCATION</td><td style="text-align: right;">802</td></tr> <tr><td>CHARGE OFF LOCATION</td><td style="text-align: right;">803</td></tr> <tr><td>CHARGE OFF LOCATION</td><td style="text-align: right;">804</td></tr> <tr><td>CHARGE OFF LOCATION</td><td style="text-align: right;">805</td></tr> <tr><td>CHARGE OFF LOCATION</td><td style="text-align: right;">806</td></tr> <tr><td>CUSTOMER HOME LOCATION</td><td style="text-align: right;">901</td></tr> <tr><td>CUSTOMER HOME LOCATION</td><td style="text-align: right;">902</td></tr> <tr><td>CUSTOMER HOME LOCATION</td><td style="text-align: right;">903</td></tr> <tr><td>CUSTOMER HOME LOCATION</td><td style="text-align: right;">904</td></tr> <tr><td>CUSTOMER HOME LOCATION</td><td style="text-align: right;">905</td></tr> <tr><td>CUSTOMER HOME LOCATION</td><td style="text-align: right;">906</td></tr> </tbody> </table>			SKIP/STOLEN LOC	706	CHARGE OFF LOCATION	801	CHARGE OFF LOCATION	802	CHARGE OFF LOCATION	803	CHARGE OFF LOCATION	804	CHARGE OFF LOCATION	805	CHARGE OFF LOCATION	806	CUSTOMER HOME LOCATION	901	CUSTOMER HOME LOCATION	902	CUSTOMER HOME LOCATION	903	CUSTOMER HOME LOCATION	904	CUSTOMER HOME LOCATION	905	CUSTOMER HOME LOCATION	906
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CUSTOMER HOME LOCATION	905																											
CUSTOMER HOME LOCATION	906																											
Location To Transfer To																												
F1-Forward	F2-Back	F10-Exit																										
		ENTER-Select																										

**Figure 9- 7 Inventory Transfer of Location Screen**

Use your up and down arrow keys to highlight the selection. When you have the correct new location, press the ENTER key to select.

Enter the date of transfer or press the ENTER key to accept the default of today's date. The screen will then prompt for "Any Changes". If you need to make changes, enter a Y for yes and do so. If not, press the ENTER key to accept the default of N for no.

The cursor will now be beside "Transfer Notes". You may enter up to two lines of notes to the receiving location.

Note: Notes are not stored by the system and are printed on the transfer receipt only. Please keep a hard copy of the transfer receipt if you need the notes for your records.

After you have entered your notes, if any, press the ENTER key. You will be prompted for "Write off Code". If you leave this field blank, you will see a window from which you may make a selection, see Figure 9-8.

Inventory Transfer Of Location								
Old Location: 2 RSSS APPLIANCES #2	New Location: 802 CHARGE OFF LOCATION	Transfer Date: 11/22/06						
Serial Numbers:								
<table border="1" style="border-collapse: collapse;"> <tr> <td style="width: 5%;">B</td> <td>Store Burglary</td> </tr> <tr> <td>L</td> <td>Store Loss</td> </tr> <tr> <td>Z</td> <td>Junked</td> </tr> </table>			B	Store Burglary	L	Store Loss	Z	Junked
B	Store Burglary							
L	Store Loss							
Z	Junked							
Transfer Notes: THIS IS A TRNFER NO								
Write Off Code:	Reason for Write Off (Blank for Window)							
<hr/> F10-Exit <span style="float: right;">ENTER-Select</span>								

**Figure 9- 8 Inventory Transfer of Location Screen for Charge Off**

Using your arrow keys, highlight the reason and press the ENTER key. You will now be prompted for "Any More Changes". If you want to change your notes, or to change the Write Off Code, press Y for yes. If not, press the ENTER key to accept the default of N for no.

Your cursor will now be beside "Serial Number". Enter the serial number of the item you are charging off and press the ENTER key or press the F1 key to search for the inventory item. You will be prompted "Transfer this item". If you have typed in the wrong serial number, press the ENTER key to accept the default of N for no, if it is correct, enter a Y for yes.

When you answer the "Transfer this item" prompt with a Y for yes, the cursor will go below the serial number you just entered. If you need to transfer more inventory, enter the serial numbers (15 transfers maximum per screen).

When you have transferred all inventory from this location to the charge off location, press the F9 key. The receipt from this transfer will print out. You will then be prompted to "Print Another Receipt". If you want another receipt, press Y for yes. When you have printed all the receipts you want, press the ENTER key to accept the default of N for no. Note that after entering N for no to reprint, you will no longer be able to reprint the receipt. However, you will be able to print the inventory transfer report for this information or view on screen using the List Transfers Made (LISTTRAN) program.

### **Pending Inventory Transfer (Transfer Type Option 2)**

To transfer pending inventory, select option 2, Pending Inv Transfer from the Transfer Inventory Location Screen, see Figure 9-2. The cursor will now be on Old

Location. Enter the location number where the inventory is coming from (4 characters, example 0001). If you don't know the location number, press the ENTER key and you will see a window showing options you may choose from, see Figure 9-9.

Inventory Pending Transfer																													
Old Location:	0	New Location:	0																										
		Transfer Date:	11/22/06																										
<table border="1" style="margin: auto; border-collapse: collapse;"> <tbody> <tr><td>RSSS APPLIANCES</td><td style="text-align: right;">0</td></tr> <tr><td>RSSS APPLIANCES #1</td><td style="text-align: right;">1</td></tr> <tr><td>RSSS APPLIANCES #2</td><td style="text-align: right;">2</td></tr> <tr><td>RSSS APPLIANCES #3</td><td style="text-align: right;">3</td></tr> <tr><td>RSSS APPLIANCES #4</td><td style="text-align: right;">4</td></tr> <tr><td>RSSS APPLIANCES #5</td><td style="text-align: right;">5</td></tr> <tr><td>RSSS APP WAREHOUSE</td><td style="text-align: right;">6</td></tr> <tr><td>RSSS APP SERVICE CENTER</td><td style="text-align: right;">7</td></tr> <tr><td>OTHER LOCS</td><td style="text-align: right;">99</td></tr> <tr><td>DEMO/LOANER LOC</td><td style="text-align: right;">501</td></tr> <tr><td>DEMO/LOANER LOC</td><td style="text-align: right;">502</td></tr> <tr><td>DEMO/LOANER LOC</td><td style="text-align: right;">503</td></tr> <tr><td>DEMO/LOANER LOC</td><td style="text-align: right;">504</td></tr> </tbody> </table>				RSSS APPLIANCES	0	RSSS APPLIANCES #1	1	RSSS APPLIANCES #2	2	RSSS APPLIANCES #3	3	RSSS APPLIANCES #4	4	RSSS APPLIANCES #5	5	RSSS APP WAREHOUSE	6	RSSS APP SERVICE CENTER	7	OTHER LOCS	99	DEMO/LOANER LOC	501	DEMO/LOANER LOC	502	DEMO/LOANER LOC	503	DEMO/LOANER LOC	504
RSSS APPLIANCES	0																												
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RSSS APPLIANCES #2	2																												
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RSSS APP WAREHOUSE	6																												
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OTHER LOCS	99																												
DEMO/LOANER LOC	501																												
DEMO/LOANER LOC	502																												
DEMO/LOANER LOC	503																												
DEMO/LOANER LOC	504																												
Current Inventory Location																													
F1-Forward		F2-Back																											
		F10-Exit																											
		ENTER-Select																											

**Figure 9- 9 Inventory Transfer of Location Screen**

After selecting the Old Location, the cursor will now be on New Location. Type in the location number for the pending location where you want the inventory to go. If you do not know the pending location number, blank out the New Location field and make a selection from the window.

**Note: You MUST transfer to a pending location that was setup as a pending location in Location Maintenance (LOCMNT).**

Enter the date of transfer or press the ENTER key for today's date. The screen will then prompt "Any Changes". If you need to make changes, do so. If not, press the ENTER key and you will see a screen similar to Figure 9-10.

```
Inventory Pending Transfer

Old Location: 2      New Location: 1001      Transfer Date: 11/22/06
RSSS APPLIANCES #2  PENDING LOC 1

Serial Numbers:

Customer Name: SHERRY BAKER
Selling Salesman Number: 1
Notes: HOLD THIS ITEM TILL THE REST OF THE KIT
      COMES IN DEC 1 2006.█

Arrow Keys-Positioning Return-Next Field F8-Backout Cmd-Exit Pgm
```

**Figure 9-10 Inventory Transfer of Location Screen**

The cursor will now advance to the Customer Name. Enter the name of the customer this item was sold to. The cursor will advance to Selling Salesman Number. Enter the Selling Salesman Number. The cursor will advance to Notes. Type in information about this sale.

Note: Notes are not stored by the system and are printed on the transfer receipt only. Please keep a hard copy of the transfer receipt if you need the notes for your records.

Once you have completed this section, press the F9 key and you will get the prompt "Any More Changes: N". If you have completed this section, press the ENTER key to accept the default of N for no.

On the next screen, enter the serial number. See Figure 9-11.



Inventory Pending Transfer			
Old Location: 2	New Location: 1001	Transfer Date: 11/22/06	
RSSS APPLIANCES #2	PENDING LOC 1		
Serial Numbers: FGR3002636	MICROWAVE	2	N
Transfer This Item: <input type="checkbox"/> N			
F1-List Inv		F9-Done	

**Figure 9-12 Inventory Transfer of Location Screen**

If this is not the item you wish to transfer, type in an N for no. This will then take you back to the serial number prompt. If it is the right item, type in a Y for yes. When you answer this prompt with a Y for yes, the cursor will go below the serial number you just entered. If you need to transfer more inventory, enter the serial numbers (15 transfers maximum per screen).

When you have no other transfers to make from this particular old location to this particular new location, press the F9 key. The receipt from this transfer will print out. You will then be prompted to "Print Another Receipt". If you want another receipt, press Y for yes. When you have printed all the receipts you want, press N for no at this prompt and the system will return you to the Transfer Notes prompt. If you still have other transfers to make, but need to change the Old or New Location, press the F8 key. This will take you back up to the Old Location.

### **Demo Inventory Transfer (Transfer Type Option 3)**

To transfer demo inventory, select option 3, Demo Inv Transfer from the Transfer Inventory Location Screen, see Figure 9-2. The cursor will now be resting on Old Location. Enter the location number where the inventory is coming from (4 characters, example 0001). If you don't know the location number, press the ENTER key and you will see a window showing options you may choose from as seen in Figure 9-3. The cursor will now be on New Location. Type in the location number for where you want the inventory to go

**Note: You MUST transfer to a location that was setup as a demo location in Location Maintenance (LOCMNT).**

If you don't know the location number, press the ENTER key and you will see a window showing options you may choose from, see Figure 9-3. Enter the date of transfer or press the ENTER key for today's date. The screen will then prompt "Any Changes". If you need to make changes, do so. If not, press the ENTER key to accept the default of N for no. The screen will now change slightly. See Figure 9-13 for fields that will need to be filled out prior to entering the demo/loaner item.

```
Inventory Demo Transfer

Old Location: 1      New Location: 501      Transfer Date: 11/27/06
RSSS APPLIANCES #1      DEMO/LOANER LOC

Serial Numbers:

Customer Number: 5003338
Customer Name: BAKER
Address: 536 WISTAR CT
City: ANYTOWN      State: TX Zip: 55555
Phone: (555)555-5555
Reason For Demo: 1
Notes: ON LOAN TILL HERS COMES BACK FROM REPAIRS

Ticket Number: 10040845

Any More Changes: N

Arrow Keys-Positioning Return-Next Field F8-Backout Cmd-Exit Pgm
```

**Figure 9-13 Inventory Demo Transfer Screen**

**CUSTOMER NUMBER** If you know the customer's account number, enter it here. If not, make sure this area is blank and press the ENTER key.

**CUSTOMER NAME** If the customer number was filled in, this will have filled in automatically. If you do not know the customer number, you may enter a few characters of the customer's last name and press the ENTER key. You will see a window showing different last names that begin with the characters you entered. Using your arrow keys, highlight the correct one and press the ENTER key. This will fill in the Customer's Number for you. If you type in a common name such as John Smith and there are many entries with the same name, you can press the F5 key which will unfold the information. If the John Smith is not in the first box you are looking at, you can press the F1 key for the next page and page forward to find the one you are looking for. This will more accurately help you choose the correct account.

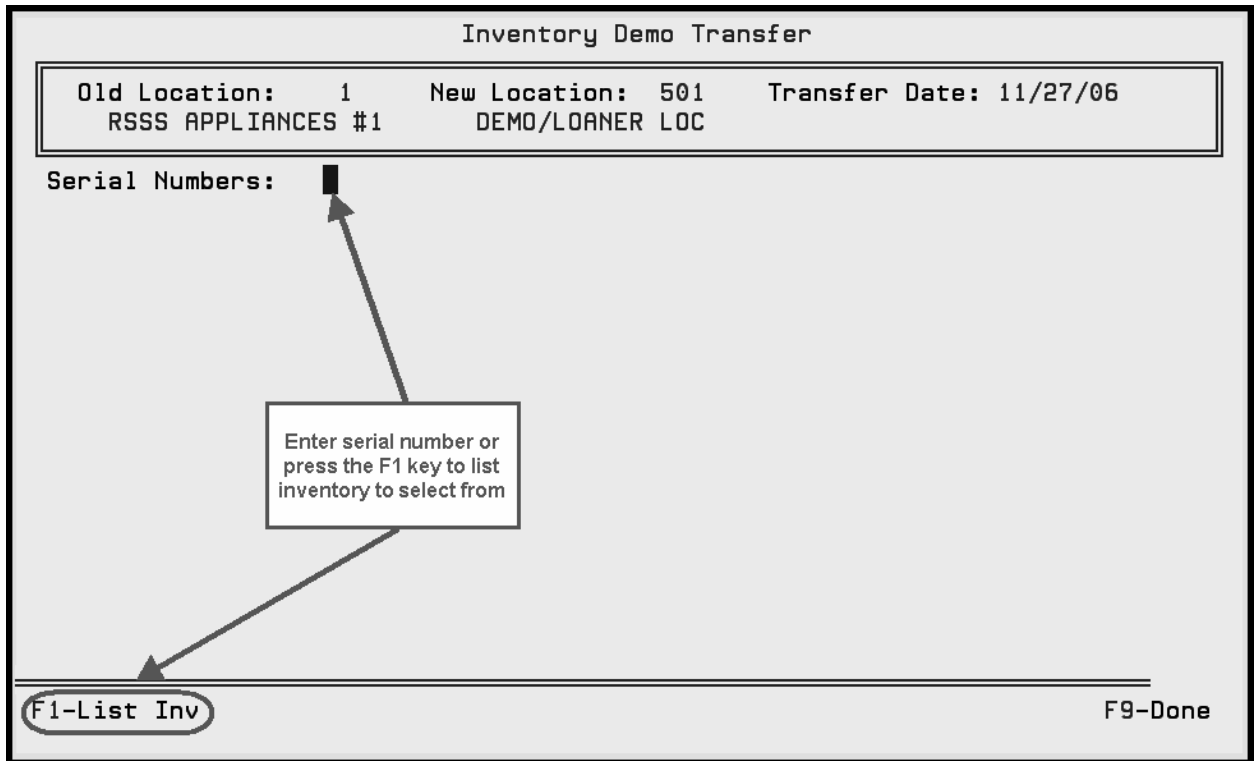
**ADDRESS CITY STATE ZIP PHONE** These will all be filled in automatically. You should verify this is the correct address for the customer. If any of these are not correct, be sure to type over what is there and correct it.

**REASON FOR DEMO**      1 = Set in Repair, 2 = Trial use, 3 = Donation

**NOTES**      You may enter up to two lines of notes on this transaction. To advance to the next field, press the F9 key. These notes will print on the inventory transfer receipt. Note: These notes are not stored in the system. Keep a hard copy if you need these notes for your records.

**TICKET NUMBER**    If you know the ticket number of the customer you are transferring the demo to, enter it here, otherwise press the ENTER key and a window will display the tickets that are available for you to choose from.

You will now be prompted for "Any More Changes". If you need to make changes, enter a Y for yes and make your changes. When the prompt "Any More Changes" is answered with an N for no, your cursor will move beside "Serial Number". See Figure 9-14.



**Figure 9-14 Inventory Demo Transfer Screen**

Enter the serial number. The system will display the serial number on the Inventory Transfer of Location Screen, press the ENTER key.

The system will then display the description, location and status of this piece of inventory and the cursor will be on the bottom of the screen next to the prompt "Transfer This Item" , see Figure 9-15.

Inventory Demo Transfer					
Old Location:	1	New Location:	501	Transfer Date:	11/27/06
	RSSS APPLIANCES #1		DEMO/LOANER LOC		
Serial Numbers:	56613452	BIG SCREEN		1	R
Transfer This Item: <input type="checkbox"/> N					
F1-List Inv			F9-Done		

**Figure 9-15 Inventory Demo Transfer Screen**

If this is not the item you wish to transfer, type in an N for no. This will then take you back to the serial number prompt. If it is the right item, type in a Y for yes. When you answer this prompt with a Y for yes, the cursor will go below the serial number you just entered. If you need to transfer more inventory, enter the serial numbers.

If you have no other transfers to make from this particular old location to this particular new location press the F9 key. The receipt from this transfer will print out. You will then be prompted "Print Another Receipt". If you want another receipt, press Y for yes. When you have printed all the receipts you want, press N for no at this prompt and the system will return you to the Serial Numbers prompt. Note that after entering N for no to reprint, you will no longer be able to reprint a receipt. However, you will be able to print the inventory transfer report for this information. If you still have other transfers to make, but need to change the Old or New Location, press the F8 key. This will take you back up to the Old Location.

Once the demo/loaner item has been transferred to that customer's ticket, the Take Payments (RP) screen will display a message about the loaner as seen in Figure 9-16.

Name: BAKER		Security Entry		11/27/06	
Add: 536 WISTAR CT, NE		Acct#: 5003338		H Ph: (555)555-5555	
City: ANYTOWN TX 55555		BTTC:		W Ph: (555)555-5555	
PayDay:		BBucks: 45			
Comment: *****10.04.01 SENT BAD CHECK LETTER JS					
*****10.04.01 GET HOME NUMBER JS*****					

Ticket#	Seq	Bal	#P	Pmt	Amt	Other	Late	Grp	Esp	Tax	Tot	Due	Due Date
Club Fee		13.38	1		12.95							12.95	11/05/06
BIG SCORE	3289.88	1		299.99			5.00			24.75	329.74		11/05/06
BIG SCORE	8033.22	4		102.99			20.00			33.99	465.95		10/31/06

\* \* \* \* \*  
 \* T I C K E T H A S A L O A N E R U N I T \*  
 \* D O N O T P A Y O F F U N T I L I T \*  
 \* I S R E T U R N E D \*  
 \* \* \* \* \*

F1-CustChg F2-Payoff F3-ShowTic/BadChk F4Hist F6-Comment F7-Date/Amt F8-Back

Figure 9-16 Take Payments Screen with Loaner message

### Delivery/Pickup Inventory Transfer (Transfer Type Option 4)

To deliver or pickup inventory, select option 4, Delivery/Pick Up Inv Transfer from the Transfer Inventory Location Screen, see Figure 9-2. The cursor will now be resting on Old Location. Enter the location number where the inventory currently exists (4 characters, example 0001). If you don't know the location number, press the ENTER key and you will see a window showing options you may choose from.

The cursor will now be on New Location. Type in the customer home location for this store. If you don't know the location number, press the ENTER key and you will see a window showing options you may choose from. Press the ENTER key for today's date. The screen will then prompt for "Any Changes". If you need to make changes, do so. If not, press the ENTER key.

Your cursor will now be beside "Acct Nbr". Enter the account number. If you enter a valid account number, the information, name, address, etc., about that account will automatically appear. If you do not know the account number, making sure the account number information is blank, press the ENTER key. Your cursor will move to the "Customer Name" prompt. Enter part of the customers last name press the ENTER key to get a selection window. If you type in a common name such as John Smith and there are many entries with the same name, you can press the F5 key which will unfold the information for you to view. If the John Smith is not in the first box you are looking at, press the F1 key for the next page so that you can select the correct John Smith. This will more accurately help you choose the correct account. When you have filled in all the information, you will be prompted for "Any More Changes". If you put something in incorrectly, press Y for yes, if not, press the ENTER key to accept the default of N for no, see Figure 9-17.

```

Inventory Delivery/Pick Up
-----
Old Location: 1      New Location: 901      Transfer Date: 11/27/06
RSSS APPLIANCES #1  CUSTOMER HOME LOCATI

Serial Numbers:

Acct Nbr: 10012227      Customer Name: BAKER
Address: 9999 HOLLYWOOD DRIVE
City: CORPUS CHRISTI   State: TX      Zip: 11111
Phone: (361)999-9999
Delivery/Pickup Date: 11/27/06
Delivery/Pickup Notes: HAVE DEBRA SIGN DATE AND TIME WHEN SHE RECE
IVES THE ITEM

Cod: N
Ticket Number: 10040851      Selling Salesman Number: 1
Selling Store: 1

Any More Changes: N
-----
Arrow Keys-Positioning Return-Next Field F8-Backout Cmd-Exit Pgm
    
```

**Figure 9-17 Inventory Delivery/Pick Up Screen**

Your cursor will now be at the "Serial Numbers" prompt. See Figure 9-18.

```

Inventory Delivery/Pick Up
-----
Old Location: 1      New Location: 901      Transfer Date: 11/27/06
RSSS APPLIANCES #1  CUSTOMER HOME LOCATI

Serial Numbers: █

Assign serial numbers
for stock, layaway or
special order items that
have not previously had
a serial number assigned
to them

Exchange the ticket
serial number

List the serial
numbers on a ticket

-----
F1-List Inv  F2-Stock/SpecOrdr  F3-Exchange  F4-Ticket Inv  F9-Done
    
```

**Figure 9-18 Inventory Delivery/Pick Up Screen Function Key Options**

At the bottom of the screen is a list of prompts for you to use. Press the F2 **Stock/SpecOrdr** to assign serial numbers/deliver open stock, layaway or special

order tickets. Press the F3 key **to exchange the ticket serial number**. Press the F4 key to **list the serial numbers on a ticket**.

Note: You must choose the F2 or F3 key to process the transfer.

If you press the F2 key, see Figure 9-19, and enter each serial number next to seq (sequence) number or press the F3 key to list inventory available for this model number.

PO Nbr	Seq#	Serial Nbr	Model Number	Ticket Nbr	Type	Misc
01	0	7 88888	FLSEM2941	10040851		0

Seri

F1-Forward   F2-Back   F3-List Inv   F8-Abort   F9-Update   F10-Exit

**Figure 9-19 Inventory Delivery/Pick Up Screen Enter the serial number(s)**

The system will display the serial number on the Inventory Transfer of Location Screen. Press the ENTER key. The system will then display the description, location and status of this piece of inventory and the cursor will be on the bottom of the screen next to the prompt "Transfer This Item", see Figure 9-20.

Inventory Delivery/Pick Up					
Old Location:	1	New Location:	901	Transfer Date:	11/27/06
RSSS APPLIANCES #1		CUSTOMER HOME LOCATI			
Serial Numbers:	88888	LIVING ROOM		1	0
Transfer This Item: N					
F1-List Inv	F2-Stock/Spec0rdr	F3-Exchange	F4-Ticket Inv	F9-Done	

**Figure 9-20 Inventory Delivery/Pick Up Screen Transfer the Item prompt**

Or if you pressed the F3 key as seen in Figure 9-19 after you selected the correct ticket for the correct customer that you want to exchange the item for, you will get a screen similar to Figure 9-21. Enter the serial number in the box beside the model number. Note: You can only exchange serial numbers with the same model number. If they are making an exchange for a different model number, process a refund in SALE program and re-ring with new item.

Change Serial Numbers On A Ticket

01	Old Ser #	New Ser #	Model Number	Type
	88888	88889	FLSEM2941	0

Seri

---

F1-Forward    F2-Back    F3-List Inv    F8-Abort    F9-Update    F10-Exit

**Figure 9-21 Change Serial Numbers On A Ticket Screen**

The system will display the serial number on the Inventory Transfer of Location Screen. Press the ENTER key. The system will then display the description, location and status of this piece of inventory and the cursor will be on the bottom of the screen next to the prompt "Transfer This Item", see Figure 9-22.

Inventory Delivery/Pick Up					
Old Location:	1	New Location:	901	Transfer Date:	11/27/06
	RSSS APPLIANCES #1		CUSTOMER HOME LOCATI		
Serial Numbers:	88889	LIVING ROOM	1	0	
Transfer This Item: <input type="checkbox"/> N					
F1-List Inv	F2-Stock/Spec0rdr	F3-Exchange	F4-Ticket Inv	F9-Done	

**Figure 9-22 Inventory Delivery/Pick Up Screen**

If this is not the item you wish to transfer, type in an N for no. This will then take you back to the serial number prompt. If it is the right item, type in a Y for yes. When you answer this prompt with a Y for yes, the cursor will go below the serial number you just entered. If you need to transfer more inventory, enter the serial numbers. If you have no other transfers to make from this particular old location to this particular new location, press the F9 key. The receipt from this transfer will print out. You will then be prompted to "Print Another Receipt". If you want another receipt, press Y for yes. When you have printed all the receipts you want, press N for no at this prompt and the system will return you to the Account Numbers prompt. Press the F8 key to return to the Serial Numbers prompt. If you still have other transfers to make, but need to change the Old or New Location, press the F8 key. This will take you back up to the Old Location. You can continue to press the F8 key to return to each previous menu; in other words, to back your way out of this option or press F10 and at the command line enter the next program name you want to go to.

### **Bar Code Number Transfer (Transfer Type Option 5)**

To transfer by bar code number, select Option 5, Bar Code Number Transfer from the Transfer Inventory Location Screen, see Figure 9-2. The cursor will now be resting on Old Location. Enter the current location number of the inventory (4 characters, example 0001). If you don't know the location number, press the ENTER key and you will see a window showing options you may choose from, see Figure 9-3. The cursor will now be on New Location. Type in the new location number for the inventory, if you don't know the location number, press the ENTER key and you will see a window showing options you may choose from, see Figure 9-3. Enter the date of transfer or press the ENTER key for today's date. The screen will then prompt for

"Any Changes". If you need to make changes, enter a Y for yes and make your changes.

When the prompt "Any More Changes" is answered with an N for no, your cursor will now be beside "Transfer Notes". You may enter up to two lines of notes for the receiving location. This information will print on the transfer receipt that is printed after the transfer.

Note: Notes are not stored by the system and are printed on the transfer receipt only. Please keep a hard copy of the transfer receipt if you need the notes for your records.

After you have entered your notes, if any, press the F9 key. You will be prompted for "Any More Changes", see Figure 9-23.

Bar Code Number Transfer

Old Location: 1	New Location: 2	Transfer Date: 11/27/06
RSSS APPLIANCES #1	RSSS APPLIANCES #2	

Transfer Notes:

Any More Changes: N

---

F8--Prev Menu

**Figure 9-23 Bar Code Number Transfer Screen**

If you want to change the notes, enter a Y for yes. If not, press the ENTER key and your cursor will be beside "Bar Code Numbers", or you may press the F1 key and at the "Start Key" type in a few digits of the bar code and press the F5 key for a listing of inventory by bar code. Using your arrow keys, arrow down to the correct piece of inventory and press the ENTER key. Or using your bar code equipment (i.e. keyboard wedge scanner), scan the bar codes of each item you wish to transfer, see Figure 9-24.

Bar Code Number Transfer				
Old Location:	1	New Location:	2	Transfer Date: 11/27/06
RSSS APPLIANCES #1		RSSS APPLIANCES #2		
Bar Code Numbers:	47581	SM3852336	REFRIDGERATOR	1 R
Transfer Notes:				
F1 -List Inventory				
F8-Enter New Locs Enter-Print Receipt				

**Figure 9-24 Bar Code Number Transfer Screen with bar code numbers**

### **Bar Code Transfer from File (Transfer Type Option 6)**

To transfer bar codes from a file, select Option 6, Bar Code Transfer from File from the Transfer Inventory Location Screen, see Figure 9-2. The cursor will now be resting on Old Location. Enter the location number where the inventory is coming from (4 characters, example 0001). If you don't know the location number, press the ENTER key and you will see a window showing options you may choose from. The cursor will now be on New Location. Type in the new location of the inventory, if you do not know the location number, press the ENTER key and you will see a window showing options you may choose from. Enter the date of transfer or press the ENTER key for today's date. The screen will then prompt for "Any Changes". If you need to make changes, do so. If not, press the ENTER key. Your cursor will now be beside "Compare Scan to:" You will type in either "B" for barcode or "S" for serial number or "D" for download from PDT3100, or "I" to input the file depending on what you want the scan compared to. See Figure 9-25.

Bar Code Number Transfer From File

Old Location: 1	New Location: 2	Transfer Date: 11/27/06
RSSS APPLIANCES #1	RSSS APPLIANCES #2	

Compare Scan to:  Input File Name:

(B)arcode, (S)erial number, (D)ownload From Device, Or (I)nput File Name

---

F8--Prev Menu

**Figure 9-25 Bar Code Number Transfer from File Screen**

### Compare Scan to Barcode

Enter "B" and press the ENTER key, your cursor will stop at Input File Name. Since you are selecting compare to scan barcode, press the ENTER key through this Input File Name field. You will then be prompt "Any Changes: N". If you have no more changes to this screen, press the ENTER key. If you need to correct something on this screen, type Y for yes, make your changes. When the "Any Changes: N" prompt displays and you accept the default of N for no, your screen will change to resemble the screen in Figure 9-26.

```
Bar Code Number Transfer From File

Old Location: 1      New Location: 2      Transfer Date: 11/27/06
RSSS APPLIANCES #1  RSSS APPLIANCES #2

Compare Scan to: B   Input File Name:
Enter Bar Code Nbr: █-----

Press CMD or F8 Key When All Numbers Are Entered

F8--Prev Menu
```

Figure 9-26 Bar Code Number Transfer from File Screen Option B

### Compare Scan to Serial Number

Enter an "S" and press the ENTER key, your cursor will stop at Input File Name. Since you are selecting compare to scan serial number, press the ENTER key through this Input File Name field. You will then be prompt "Any Changes: N". If you have no more changes to this screen, press the ENTER key. If you need to correct something on this screen, type Y for yes, make your changes. When the "Any Changes: N" prompt displays and you press the ENTER key to accept the default of N for no, your screen will change to resemble the screen in Figure 9-27.

The screenshot shows a terminal window titled "Bar Code Number Transfer From File". At the top, there is a box containing the following information: "Old Location: 1", "New Location: 2", and "Transfer Date: 11/27/06". Below this, it says "RSSS APPLIANCES #1" and "RSSS APPLIANCES #2". Underneath the box, the screen displays "Compare Scan to: S" and "Input File Name:". Below that, there is a prompt "Enter Serial Nbr:" followed by a cursor and a series of dashes. In the center of the screen, it says "Press CMD or F8 Key When All Numbers Are Entered". At the bottom left, there is a prompt "F8--Prev Menu".

Figure 9-27 Bar Code Number Transfer from File Screen Option S

### Compare Scan to Download from PDT3100

Enter a "D" and press the ENTER key, your cursor will stop at Input File Name. Since you are selecting compare to scan download from PDT3100, press the ENTER key through this Input File Name field. You will then be prompt "Any Changes: N". If you have no more changes to this screen, press the ENTER key. If you need to correct something on this screen, type Y for yes, make your changes. When the "Any Changes: N" prompt displays and you press the ENTER key to accept the default of N for no, your screen will change to resemble the screen in Figure 9-28.

The screenshot shows a terminal window titled "Bar Code Number Transfer From File". At the top, there is a box containing the following information: "Old Location: 1", "New Location: 2", and "Transfer Date: 11/27/06". Below this, it says "RSSS APPLIANCES #1" and "RSSS APPLIANCES #2". Underneath the box, the text reads "Compare Scan to: D" and "Input File Name:". Further down, there are instructions: "After The File Is Downloaded Press The Delete Key On The PC Keyboard." and "Enter The tty Port Or Accept The Default." followed by "ttyp101". At the bottom of the screen, there is a horizontal line and the text "F8--Prev Menu".

Figure 9-28 Bar Code Number Transfer from File Screen Option D

### Compare Scan to Input File Transfer

Enter an "I" and press the ENTER key, your cursor will stop at Input File Name. Since you are selecting compare to scan input file, you will need to know where the downloaded 'transfer' file resides. If you are using a collection device other than the PDT3100 and you selected "I", you will need to enter the input file "transfer" that was created previously in the download process. The file is called "TRANSFER" and this transfer file will reside on the same login that you did the download process with. It is recommended that you are logged in to 'transfer' with the same login that was used to 'download' and build the transfer file with. See Figure 9-29.

**Note: When using the input file option the first 10 characters of the file must contain the number you want to transfer.**

```
Bar Code Number Transfer From File

Old Location: 1      New Location: 2      Transfer Date: 11/27/06
RSSS APPLIANCES #1  RSSS APPLIANCES #2

Compare Scan to: I   Input File Name: TRANSFER█

For the (I) compare scan to option, the input file name. The first 10
characters of the file must contain the number you want to transfer.

F8--Prev Menu
```

**Figure 9-29 Bar Code Number Transfer from File Screen Option I**

Enter the Input file Name and press the ENTER key. You will then be prompt "Any Changes: N". If you are ready to transfer the inventory press ENTER and accept the default of N for no. The process of loading file for transfer is occurring and the inventory will be transferred. When it is complete, receipts will print. See Figure 9-30.

Bar Code Number Transfer From File		
Old Location: 1	New Location: 2	Transfer Date: 11/27/06
RSSS APPLIANCES #1	RSSS APPLIANCES #2	
Compare Scan to: I	Input File Name: TRANSFER	
Any Changes: N		
F8--Prev Menu		

**Figure 9-30 Bar Code Number Transfer from File Screen Option I loading transfers**

Connect the portable device you are using to transfer inventory with. Use the command key or scan the barcode which "Downloads Inventory". You will now see the barcode numbers scan on the screen. When the download process is complete, press your command key or press the F8 key to print the transfer receipt(s).

### **Service Transfer**

Enter transfer type 7: Item To/From Service, enter the current location in the Old Location prompt. Enter the new location is the New Location prompt, if you do not know the location number enter and a selection window will appear. Enter thru transfer date and your screen will resemble Figure 9-31. Enter in any service notes for this item. If you are transferring from a customer or store to service location and have a service ticket number, enter it beside "Ticket Nbr To Service". If you are transferring from Service location back to customer or store location and have a service ticket number, enter it beside "Ticket Nbr From Service: ".

If this item is being sent to service from a customer, enter to "Customer Name:" and enter the customer's last name; a customer listing will appear; select the correct customer. Their information will populate the following fields. You may edit the address fields by moving your cursor to the field. If you have no changes to this screen, press the F9 key and press the ENTER key to accept the default of "N" for no more changes. Your cursor will now be at the serial number prompt; enter in the serial number and complete the transfer.

```

Inventory Service Transfer
-----
Old Location: 901      New Location: 601      Transfer Date: 1/14/07
CUSTOMER HOME LOCATI  SERVICE LOCATION
-----
Serial Numbers:

Service Notes: █

Ticket Nbr To Service:      0
Ticket Nbr From Service:    0

Acct Nbr:                   Customer Name:
Address:
City: CORPUS CHRISTI      State: TX      Zip:
Phone:
Store: 1
-----
Arrow Keys-Positioning Return-Next Field F8-Backout Cmd-Exit Pgm
    
```

**Figure 9-31 Inventory Service Transfer Screen from Customer To Service**

Note: When you transfer the items from service you will get the prompt "Service Amt This Item:" As shown in figure 9-32. Enter your service cost here and this information will be added to the 3<sup>rd</sup> page on Inventory Maintenance (INVMNT) for this piece. Some inventory reports will factor this amount in for a more accurate return on investment.

```

Inventory Service Transfer
-----
Old Location: 601      New Location: 901      Transfer Date: 1/14/07
SERVICE LOCATION      CUSTOMER HOME LOCATI
-----
Serial Numbers: 103KA00223  AIR CONDITIONER      601  R

Service Amt This Item: █ 0.00
-----
F1-List Inv                                           F9-Done
    
```

**Figure 9-32 Inventory Service Transfer Screen from Service to Customer**

## Miscellaneous Inventory Location Transfers - MISCTRAN

This program is used to transfer miscellaneous (non-serialized) inventory from one location to another.

To get into the program, you need to be at the command line and type "MISCTRAN" or you can access it through the Inventory Functions Menu under Accessory Inventory Transfer. You will be prompted for the printer or file pathname. Press ENTER to accept the default printer or type in the proper printer number or pathname. You will now be prompted for "Separate Locations". Press ENTER and accept the default of N for no. You will see a screen similar to Figure 9-33.

```
Transfer Miscellaneous Inventory Locations
-----
Old Location: 0   New Location: 0   Transfer Date: 11/27/06
-----
Enter Current Inventory Location
-----
F8-Return To Menu
```

**Figure 9-33 Transfer Miscellaneous Inventory Locations Screen**

Your cursor will be at the prompt "Old Location". Enter the location the inventory is at right now (this should be four characters such as location 1 would be entered 0001). Your cursor will now be at the prompt "New Location". Enter the location you want this inventory to be at (also using four characters). Your cursor will now be at the prompt "Transfer Date". Press the ENTER key to accept the default of the current date.

You will now see the prompt "Any More Changes". If you need to change something, enter Y and you will be returned to the prompt "Old Location". Using your ENTER key, go from prompt to prompt making any necessary changes. When you can answer the prompt "Any More Changes" with an N for no, you will have an opportunity to enter two lines of transfer notes. See Figure 9-34.

Transfer Miscellaneous Inventory Locations		
Old Location: 1	New Location: 2	Transfer Date: 11/27/06
RSSS APPLIANCES #1	RSSS APPLIANCES #2	

Transfer Notes: █

---

F8-Return To Menu

**Figure 9-34 Transfer Miscellaneous Transfer Locations Screen**

You may enter up to two lines of notes for the receiving location. This information will print on the transfer receipt that is printed after the transfer transaction is complete.

Note: Notes are not stored by the system and are printed on the transfer receipt only. Please keep a hard copy of the transfer receipt if you need the notes for your records.

After you have entered your notes, if any, press the F9 key. You will be prompted for "Any More Changes". If you want to change your notes, enter a Y for yes. If not, press the ENTER key. Your cursor will now be at the "Model Number" prompt. See Figure 9-35.

Transfer Miscellaneous Inventory Locations		
Old Location: 1	New Location: 2	Transfer Date: 11/27/06
RSSS APPLIANCES #1	RSSS APPLIANCES #2	
Model Number	Quantity	Description
-----	----	
Transfer Notes:		
Enter the UPC Code or Model Number		
F8-Back Out		F10-Exit

**Figure 9-35 Transfer Miscellaneous Inventory Locations Screen**

You will see three new prompts. These are "Model Number", "Quantity" and "Description".

Type in the model number or scan the UPC code of the miscellaneous inventory you wish to transfer and press the ENTER key. The Description field will be filled in automatically. You will now be prompted for the quantity. Enter the numerical amount of this model number you want transferred and press the ENTER key. You will be prompted to "Transfer this Item", see Figure 9-36.

Transfer Miscellaneous Inventory Locations		
Old Location: 1	New Location: 2	Transfer Date: 11/27/06
RSSS APPLIANCES #1	RSSS APPLIANCES #2	
Model Number	Quantity	Description
ABABC	2	CLOCK W/IPOD DOC
Transfer Notes:		
Transfer This Item: <input type="checkbox"/> N		
F8-Back Out		F10-Exit

**Figure 9-36 Transfer Miscellaneous Inventory Locations Screen with data**

Type in a Y for yes to transfer the item(s). The cursor will move under the model number you just transferred. Type in another model number, if you have more miscellaneous inventory that needs to be transferred.

When you have entered all miscellaneous inventory transfers from this particular location to the new location, press the F9 key. A receipt will be printed to the printer specified earlier.

If you need to transfer more miscellaneous inventory to this location, enter the next model number you want to transfer. If you have no more transfers for this location, press the F8 key.

**Note: The size of the receipt paper for miscellaneous transfers is designated in Terminal Maintenance (TERMMNT).**