

TITLE: Internal Transfers			
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Process – Internal Transfers

1. Purpose:

- 1.1. To move inventory between locations within a warehouse.

2. Scope:

- 2.1. In order to move product from one location to another location within your warehouse, you must create an internal transfer. Within the transfer you will specify which location you will be moving the product to and from.

3. Stakeholders:

- 3.1. Production
- 3.2. Distribution
- 3.3. Retail and Delivery Operations

4. References:

5. Definitions:

- 5.1. Internal Transfer - Movement of product within a warehouse

6. Procedure:

6.1. Ways to create and view an Internal Transfer

There are 2 ways to view and create an Internal Transfer



- 6.1.1. From the navigation bar within the Inventory module. Operations > Transfers, which will list ALL transfers regardless of status
- 6.1.2. From the dashboard on the main section of the inventory module

- 6.1.2.1. The dashboard is the default view that you are taken to when you first visit the Inventory module or when you click on Inventory when in any section of the Inventory module.
 - 6.1.2.1.1. Clicking on “Internal Transfers” will list ALL transfers
 - 6.1.2.1.2. Clicking on “Waiting” will list all transfers waiting for the 1st step to be completed
 - 6.1.2.1.3. Clicking on “Late” will list all transfers past their scheduled intake date
 - 6.1.2.1.4. Clicking on “# To Do” will list all transfer in the *Ready* status

6.2. Creating and Editing an Internal Transfer

- 6.2.1. Once in the transfer list view, you can view the transfers for your warehouse. Your view will be determined by the option you click on.

Transfers

<input type="checkbox"/> Created on ▼	Reference	From	To
<input type="checkbox"/> 10/27/2021 11:42:41	TCPL/IN/00001	Partner Locations/Vendors	LFGSC/Stock
<input type="checkbox"/> 10/29/2021 09:00:55	TCPL/IN/00002	Partner Locations/Vendors	LFGSC/Stock
<input type="checkbox"/> 10/29/2021 09:00:55	TCPL/IN/00002	Partner Locations/Vendors	LFGSC/Stock

- 6.2.2. To create a new transfer, click on “Create”.
- 6.2.3. Once in the Transfer template, you can start to process the transfer.
- 6.2.4. Fields to edit in the main section

Contact	▼	Source Document	e.g. P00032
Operation Type	▼		
Source Location	▼		
Tag Count	0		
Destination Location	▼		

- 6.2.4.1. Operation Type: **Required field**
 - 6.2.4.1.1. You can create any type of stock move from within the Transfer template. For Internal Transfer, use Warehouse Name: Internal Transfers
- 6.2.4.2. Source Location – Location the product is moving from. **Required field**
- 6.2.4.3. Destination Location – location the product is moving to. **Required field**
- 6.2.4.4. Source Document – If there is a vendor RMA or some other number to associate that transfer with
- 6.2.5. Editing the various tabs

Author Initials: Date:

Approver Initials: Date:

6.2.5.1. Operations

Operations					
Product	Lot To Reserve	Demand	Reserved	Done	Unit of Measure
[Tiger Mint] Flower Test		0.000	0.000	0.000	Each
Add a line					

- 6.2.5.1.1. Click on “Add an Line” to add product(s) to the transfer
- 6.2.5.1.2. Once a product is selected, be sure the To and From locations match the Source(from) and destination(To) locations. Or you can change the destination and/or source locations if they are in a different location that is a child location of the
- 6.2.5.1.3. Enter the lot to reserve, if applicable. You can disregard until you have marked the transfer as ready after saving.
- 6.2.5.1.4. Enter the Quantity being transferred in the Demand column

6.2.5.2. Click on **MARK AS TODO**

6.2.5.3. Click on Check Availability to auto-populate lots within the system for the

Detailed Operations							
Product	From	To	Batch	Lot/Metric Tag	Destination Pack...	Reserved	Qty Done
Add a line							

products and quantity

- 6.2.5.4. You will input the lot and final quantity moved in the Detailed Operations tab
 - 6.2.5.4.1. Click on “Add an Line” to add product(s) to the transfer
 - 6.2.5.4.2. Once a product is selected, be sure the To and From locations match the Source(from) and destination(To) locations.
 - 6.2.5.4.3. Enter the lot, if applicable in the Lot/Metric Tag column
 - 6.2.5.4.4. Enter the Quantity being transferred in the Qty Done column.

6.2.5.5. Additional Info

- 6.2.5.5.1. Optional to input any information. Can leave as is.

6.2.5.6. Note

Detailed Operations	Operations	Additional Info	Note
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Add an internal note that will be printed on the Picking Operations sheet

- 6.2.5.6.1. Please leave a note as to the reason you are moving product to any locations other than Depot/Stock or Depot/Input

Author Initials: Date:

Approver Initials: Date:

6.2.5.6.2. Once you have inputted the products and required information, you can Save the transfer. This will allow you to attach any relevant documents.

[Send message](#)

[Log note](#)

[Schedule activity](#)



[Following](#)



6.2.5.7. Once you have attached any documentation, you can then Validate the transfer.

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