

Transferring Items

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SYSTEM POLICIES

The tasks in this documentation provide end users with the tools to enter data and collect data in system. It is the responsibility of the agencies to comply with State Statutes, Federal Rules and Regulations, and State policies. For further information concerning State Statutes and policies, please refer to both internal agency resources and the Department of Administrative Services website.

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Transferring Items

Transferring Items Overview

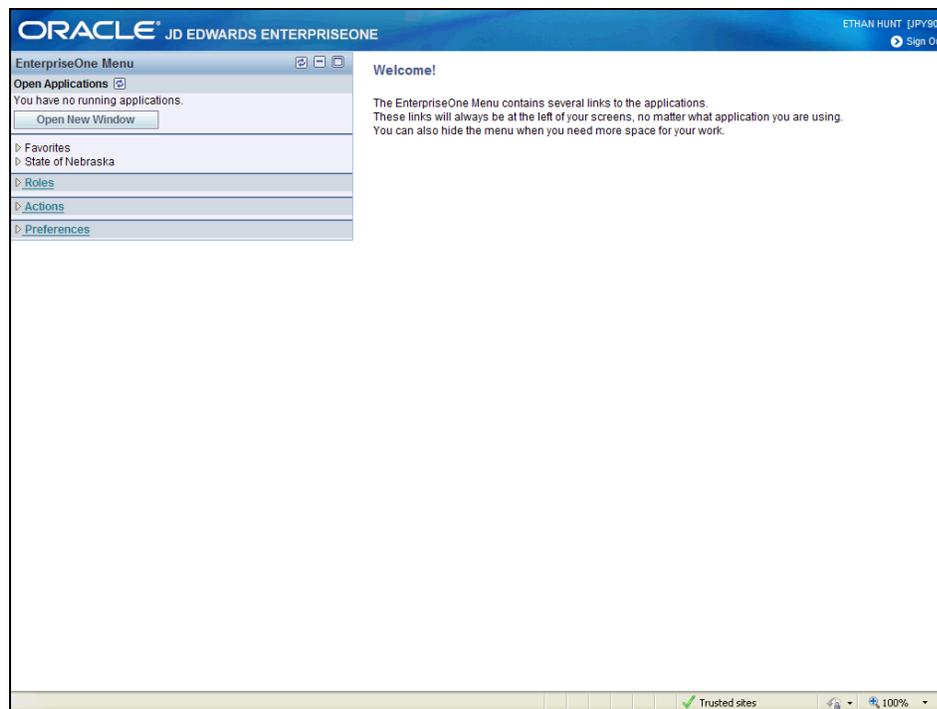
You can create transfer transactions to record inventory movement between different locations within the same branch/plant or between different branch/plants.

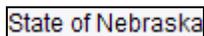
The system automatically creates journal entries each time transactions are generated that will affect the general accounting system. However, please note that the general accounting system will not be affected until the journal entries are posted. Please refer to the Training Guides to Review and Post Journal Entries.

Transferring Items Lesson

Procedure

In this lesson you will learn how to transfer items withing the same Branch/Plant and different Branch/Plant.

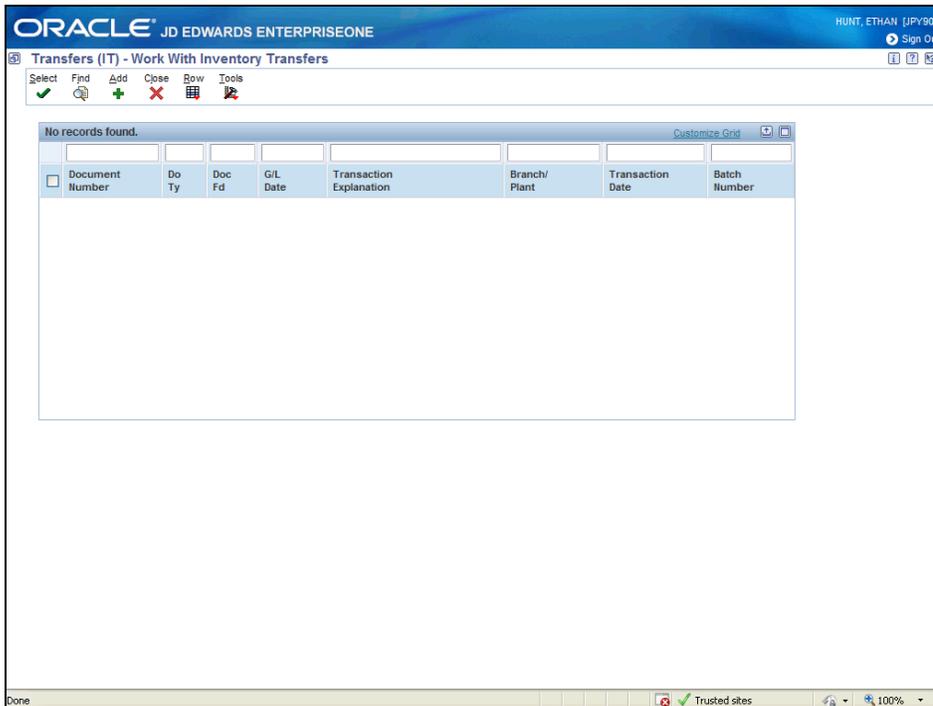


Step	Action
1.	Click the State of Nebraska link. 
2.	Click the Inventory link. 

Training Guide

Transferring Items

Step	Action
3.	Click the Inventory - Agencies link.
4.	Click the Warehouse Item Transactions link.
5.	Click the Transfers (IT) link.



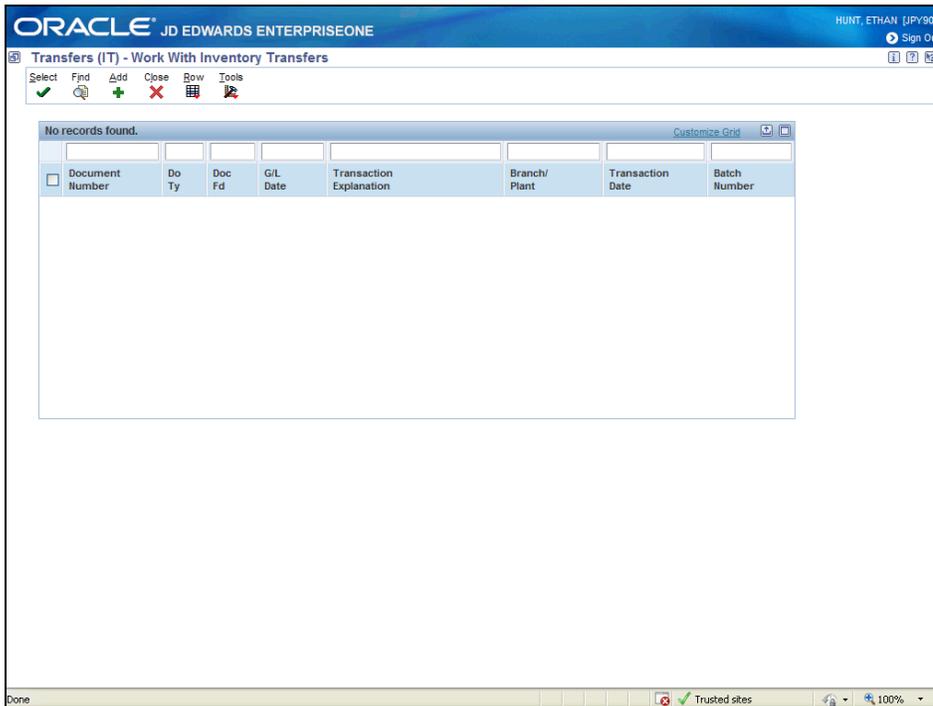
Step	Action
6.	Click the Add button.
7.	Decision: Please make a selection from the options listed below. <ul style="list-style-type: none"> • Transferring Items To The Same Branch/Plant Go to step 8 on page 2 • Transferring Items To A Different Branch/Plant Go to step 30 on page 4
8.	The Transaction Date will default to the current date.
9.	The G/L Date will default to the current date.

Step	Action
10.	Click in the Explanation field. <input type="text"/>
11.	Enter a description into the Explanation field.
12.	Click in the From Branch/Plant field. <input type="text"/>
13.	Enter the correct Branch/Plant number into the From Branch/Plant field.
14.	Click in the To Branch/Plant field. <input type="text"/>
15.	Enter the same number as the From Branch/Plant field into the To Branch/Plant field.
16.	Click in the Item Number field. <input type="text"/>
17.	Enter the item number into the Item Number field.
18.	Click in the Quantity field. <input type="text"/>
19.	Enter the amount to be transferred into the Quantity field.
20.	Click in the From Location field. <input type="text"/>
21.	Enter the location number you are transferring from into the From Location field.

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Step	Action
22.	Click in the To Location field. 
23.	Enter the location you are transferring to into the To Location field.
24.	Use the down arrow on the keyboard to move to the next row on the grid if you want to move items to multiple locations. Repeat as needed.
25.	Click the OK button. 
26.	Record the Prev Document number and Document Type if desired for future use.
27.	Click the Cancel button. 



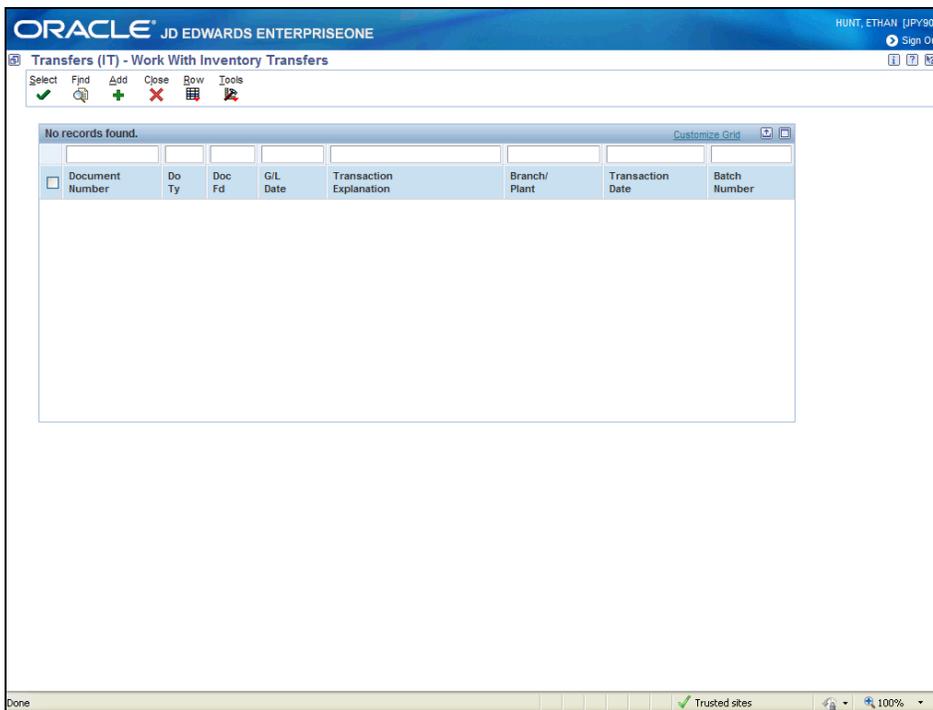
Step	Action
28.	Click the Close button. 
29.	You have successfully completed this lesson. End of Procedure. Remaining steps apply to other paths.
30.	The Transaction Date will default to the current date.
31.	The G/L Date will default to the current date.

Step	Action
32.	Click in the Explanation field. <input type="text"/>
33.	Enter a description into the Explanation field.
34.	Click in the From Branch/Plant field. <input type="text"/>
35.	Enter the correct Branch/Plant number into the From Branch/Plant field.
36.	Click in the To Branch/Plant field. <input type="text"/>
37.	Enter a different Branch/Plant number into the To Branch/Plant field.
38.	Click in the Item Number field. <input type="text"/>
39.	Enter the item number into the Item Number field.
40.	Click in the Quantity field. <input type="text"/>
41.	Enter the amount to be transferred into the Quantity field.
42.	Click in the From Location field. <input type="text"/>
43.	Enter the location number you are transferring from into the From Location field.
44.	Click in the To Location field. <input type="text"/>

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Step	Action
45.	Enter the location you are transferring to into the To Location field.
46.	Use the down arrow on the keyboard to move to the next row on the grid if you want to move items to multiple locations. Repeat as needed.
47.	Click the OK button. 
48.	Record the Prev Document number and Document Type if desired for future use.
49.	Click the Cancel button. 



Step	Action
50.	Click the Close button. 
51.	You have successfully completed this lesson. End of Procedure.