



# Create a Location Transfer

## Quick Start Guide

### Document Details

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### Overview

Location Transfers allows you to move inventory from one location to another. This enables locations to share product to avoid shortages and last-minute trips to the grocery store. Read this guide to get started.

### System Requirements

- CES Version 10.00.00 or higher



Be sure to grab the latest version of this document here:

<https://links.crunchtime.com/NCQS-CreateLocationTransfer>

OR by scanning the QR code to the left.



Watch the tutorials on MainCourse:

<https://links.crunchtime.com/NCI103a-7tiu>

<https://links.crunchtime.com/NCI103c-ipf2>

### Other Related Documentation

- NCQS – Create a Storage Transfer: <https://links.crunchtime.com/NCQS-CreateStorageTransfer>
- NCQS – Complete a Location Transfer: <https://links.crunchtime.com/NCQS-CompleteLocationTransfer>

### Related User Group Permissions

| Screen Name          | Control Name      | Description                                                                                                                                                                                                                                           |
|----------------------|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| NC-Daily Store Tasks | Location Transfer | Enables the <i>Create Location Transfer</i> option on the Inventory menu, the corresponding (+) icon on the Recent Location Transfers screen, and the <i>Sender &amp; Receiver Initiated Transfer</i> options in the Create Location Transfer pop-up. |



# Create a Location Transfer

## Start a Transfer

The screenshot shows the Net-Chef web application interface. At the top, a green banner reads "Net-Chef > Inventory: Create Location Transfer". Below this, the main header displays "CrunchTime! Net-Chef" with user "Kim" and location "Minneapolis". The left sidebar contains a menu with "Inventory" expanded, showing options like "Inventory Overview", "Create/Review Inventories", "Create Location Transfer" (highlighted with a blue box and labeled 1), "Recent Location Transfers", "Create Inventory Adjustment", "Create Recipe Adjustment", "View Recent Adjustments", and "Inventory Setup". The main content area shows a "Daily Sales Trend" chart and a "Today's Tasks" list. A "Create Location Transfer" pop-up form is displayed in the foreground, with steps 2 through 5 highlighted. Step 2 shows the transfer type selection: "Sender Initiated Transfer" (selected), "Receiver Initiated Transfer", and "Storage Transfer". Step 3 shows the "From Location" dropdown set to "304 - Portland" and the "To Location" dropdown set to "301 - Cardiff". Step 4 shows the "Transfer Date" set to "08/03/2022" and the "Reference Number" set to "300004080322". Step 5 shows the "Continue" and "Cancel" buttons at the bottom of the form.

- 1 From the Inventory menu, select *Create Location Transfer*.
- 2 In the pop-up, pick either:
  - *Sender Initiated* – if your location is **sending** product to another location.
  - OR
  - *Receiver Initiated* – if your location is **requesting** product from another location.
- 3 Use the *To Location* or *From Location* drop-down menu to select the location that will receive or send the product. The available drop-down depends on which option was selected in Step 2.

The remaining steps are the same for both Sender and Receiver Initiated Transfers:

- 4 If necessary, update the *Transfer Date* and *Reference Number*.
- 5 Select *Continue*.

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# Create a Location Transfer

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## Select Products to Transfer

**Net-Chef > Inventory: Create Location Transfer**

**CrunchTime! Net-Chef**

From Location: 304 - Portland To Location: 301 - Cardiff  
Transaction Date: 08/03/2022 Reference Number: 300004080322

**Location Transfer**

Filter By Template: N/A

**6** Add Selected Products **8** Retrieve

| Product Number | Product Name ↑         | Issue Quantity | Issue Unit | Unit Price | Available | Issuing Storage Location |
|----------------|------------------------|----------------|------------|------------|-----------|--------------------------|
| R-1002         | Beef Stew Prep         | 0.00           | GAL        | 10.0980    | 4.50      | Prep Kitchen Cooler      |
| P-1021         | Bread - Bulkie Rolls   | 0.00           | Bag        | 1.0900     | 17.08     | Top Of Freezer           |
| P-1019         | Bread - Marble         | 0.00           | Loaf       | 1.8900     | 10.00     | Top Of Freezer           |
| P-1020         | Bread - Six Grain      | 9.00           | Loaf       | 2.0500     | 19.00     | Top Of Freezer           |
| P-1013         | Cheese - Cheddar, Mild | 0.00           | Oz         | 0.0506     | 340.00    | Walk In                  |

**7**

- 6** Select *Retrieve* to see the list of available products.
- 7** Update the *Issue* or *Request Quantity* and *Issue Unit* fields with how much product should be transferred. Repeat this step for all desired products.



**Note:** The Issue Unit will default to the product's inventory unit. The drop-down menu will also include any defined alternate count units and recipe units.

- 8** Choose the *Add Selected Products* button. All products with an Issue/Request Quantity other than zero will be added to the transfer.



**Tip:** When requesting product, the *Available at Sending Location* column will show you how much of each item the other location has on-hand. You can still request more product than the sending location currently has available!

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# Create a Location Transfer

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## Submit Transfer

**Net-Chef > Inventory: Create Location Transfer: Add Selected Products**

**CrunchTime! Net-Chef** | KP Kim | 304 - Portland

From Location: 304 - Portland | To Location: 301 - Cardiff  
Transaction Date: 08/03/2022 | Reference Number: 300004080322

**Location Transfer** 9

Transfer Memo: Cardiff called to ask for a few products 10 **Submit** **Retrieve**

Filter By Template: N/A

| Product Number | Product Name      | Issue Quantity | Issue Unit | Available | Unit Price | Extended Value | Issuing Storage Location |
|----------------|-------------------|----------------|------------|-----------|------------|----------------|--------------------------|
| P-1020         | Bread - Six Grain | 9.00           | Loaf       | 19.00     | 2.0500     | 18.45          | Top Of Freezer           |
| P-2101         | Coffee Beans      | 5.00           | Bag        | 10.42     | 12.6873    | 63.44          | Storeroom                |
| P-2105         | Chickpeas, Canned | 2.00           | Can        | 23.50     | 8.1826     | 16.37          | Storeroom                |

**9** On the new screen, write a *Transfer Memo* to record why the product was transferred (*optional*)



**Tip:** If you forgot to add a product, select *Retrieve* to go back to the previous screen.

**10** Once finished, select *Submit*.



**Setup Alert:** If a Location or any of the Products that need to be transferred are not visible in Net-Chef, please reach out to your corporate team. If you're part of the corporate team, keep reading for more information!





# Transfer Setup

## Missing a Location?

Enterprise Manager > Corporate: Locations > Location Details > Transfer Locations tab

View Locations > 304 - Portland

Code: 300004 Name: 304 - Portland Create User: KPOSSIBLE  
Create Date: 05/16/2022 Last Edit User: KPOSSIBLE Last Edit Date: 08/05/2022  
Active: Y

Location Suggested Order Labor Supply Locations **Transfer Locations** PBI Vendors Taxation Alternate Address Projected Sales

Allow Location Transfers to/from All Locations: ☒ Allow Auto-Transfer: ☐

| Location Code | Location Name              | City      | State/Province | Country       | Market      |
|---------------|----------------------------|-----------|----------------|---------------|-------------|
| 200001        | 201 - Tampa                | Tampa     | FLORIDA        | UNITED STATES | South Coast |
| 200003        | 203 - Nashville Commissary | Nashville | TENNESSEE      | UNITED STATES | East Coast  |

Locations will be available as a transfer destination (either to or from) if **one** of the following is true:

- A** The destination location is listed on the Transfer Locations tab in Enterprise Manager.
- B** The "Allow Location Transfer to/from All Locations" box is checked.

## Missing a Product?

Products will only be available to transfer when **all** of the following are true:

- The product is setup as a location product at the receiving location.
- The location product has a primary storage location other than "Unassigned"
- The location product record has the "Loc. Transfer" box checked in Enterprise Manager.
- The sending location product must have product an On-Hand quantity in inventory and the Issue Quantity cannot be more than the On-Hand quantity. (This restriction will not apply to "Non-Stock" products if the "Allow Transfer of Non-Stock Items with Insufficient Available Quantity" Inventory preference has been enabled in Enterprise Manager.)
- If the "Use Single Company Department" preference is **not** enabled in Enterprise Manager:
  - The company product must be linked to a company department.
  - The company department must be linked to a location department for the current location (where the user is logged in).
  - The location department must be linked to the application user creating the transaction.

