



Create a Storage Transfer

Quick Start Guide

Document Details

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Overview

Storage Transfers allow you to move product between storage areas within the same location. When product is placed in the wrong storage location, or product is physically rearranged in the store, you can create a storage transfer to reflect that change in Net-Chef.

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-CreateStorageTransfer>

OR by scanning the QR code to the left.



Watch the tutorials on MainCourse:

<http://links.crunchtime.com/NCI103b-fu3b>

Related User Group Permissions

Screen Name	Control Name	Description
NC-Other Store Tasks	Storage Transfer	Enables the <i>Create Location Transfer</i> option on the Inventory menu, the (+) icon on the Recent Transfers screen, and the and <i>Storage Transfer</i> option in the Create Location Transfer pop-up.



Create a Storage Transfer

Start a Storage Transfer

Net-Chef > Inventory: Create Location Transfer

CrunchTime! Net-Chef

Period: January 2 - January 8 2023 | Currency: USD (\$) | Layout: My Layout | Last Refresh: 01/07/2023 22:34

Daily Sales Trend 01/02/2023 - 01/08/2023

\$33,880 Sales | \$32,051 Forecast | \$39,331 SDLY

Inventory

- Inventory Overview
- Create/Review Inventories
- Create Location Transfer
- Recent Location Transfers
- Create Inventory Adjustment
- Create Recipe Adjustment
- View Recent Adjustments
- Inventory Setup
- Location Products
- Reports

Create Location Transfer

☐ Sender Initiated Transfer ☐ Receiver Initiated Transfer ☒ Storage Transfer

Transfer Date: 08/02/2022

Reference Number: 300004080222

Continue **Cancel**

- 1 From the Inventory menu, select *Create Location Transfer*.
- 2 Choose *Storage Transfer*.
- 3 If necessary, update the *Transfer Date* and *Reference Number*.
- 4 Select *Continue*.

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Create a Storage Transfer

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Select Products to Transfer

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

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From Location: 304 - Portland To Location: 304 - Portland
Transaction Date: 08/02/2022 Reference Number: 300004080222

Location Transfer

Filter By Template: N/A

5 **Add Selected Products** **Retrieve**

Product Number	Product Name	Tax	Issue Quantity	Issue Unit	Unit Price	Available	Issuing Storage Location
P-1002	Wine - Red, Cabernet		6 10.00	BTL	5.9840	10.00	Beverage Cooler
P-1002	Wine - Red, Cabernet		0.00	BTL	5.9840	16.00	Wine Cabinet
P-1003	Wine - Red, Merlot		0.00	BTL	5.3892	40.00	Wine Cabinet
P-1004	Wine - White, Zinfandel		0.00	BTL	6.4375	33.00	Wine Cabinet
P-1005	Juice - Fruit Punch		0.00	EA	0.8854	26.00	Beverage Cooler

- 5** Select *Retrieve* to populate the list of products available to transfer.



Tip: Enter a Product Number or Name in the *Search* bar, choose an option from the *Filter by Template* drop-down, and/or select the *Funnel* (Filter) icon to further refine the product list.

- 6** Use the *Issue Quantity* and *Issue Unit* fields to indicate how much product you would like to transfer. 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. The values displayed in the Unit Price and Available columns will be calculated based on the unit selected.

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

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Create a Storage Transfer

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Review Products

Net-Chef > Inventory: Storage Transfer: Add Selected Products

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From Location: 304 - Portland To Location: 304 - Portland
Transaction Date: 08/02/2022 Reference Number: 300004080222

Location Transfer

Transfer Memo: Filter By Template: Continue Retrieve

Product Number	Product Name	Issue Quantity	Issue Unit	Available	Unit Price	Extended Value	Issuing Storage Location
P-1002	Wine - Red, Cabernet	10.00	BTL	10.00	5.9840	59.84	Beverage Cooler

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

9 Select *Continue*.



Tip: If you forgot to include a product, select *Retrieve* to go back to the previous screen containing the list of available products. Once finished select *Add Selected Products* to continue.

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Create a Storage Transfer

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Select Receiving Storage

Net-Chef > Inventory: Storage Transfer: Add Selected Products: Continue

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From Location: 304 - Portland To Location: 304 - Portland
Transaction Date: 08/02/2022 Reference Number: 300004080222

Reconcile Date: 08/02/2022 Transfer Memo: Accidentally chilled the red wine

Product Number	Product Name ↑	Tax	Issue Quantity	Issue Unit	Unit Price	Extended Value	Receiving Storage Location
P-1002	Wine - Red, Cabernet		10.00	BTL	5.9840	59.84	Wine Cabinet

10 Choose the new storage area from the *Receiving Storage Location* drop-down menu. A unique storage location is selected for each product.

11 When finished, select *Reconcile*.



Note: Storage Transfers are automatically created when a product's Primary Storage Location is updated, or when a Secondary Storage with product on hand is deactivated. The Booking Journal will show a transfer removing product from the old storage and placing it into the new or existing primary storage. The memo field will indicate what action created the transfer.

