

Transferring Parts

Transferring single items

The utilities used for transferring product at an item level from one number or category to another are found in the **Inventory > 1. Data Maintenance > 5. Utilities** menu

Product/Part # Transfer

6. Inventory > 1. Data Maintenance > 5. Utilities > 2. Product/Part # Transfer

This option takes your old number and moves it to a new number. Does not need to be within the same category. This should be used when creating a new number

The screenshot shows the 'Product/Part # Transfer' utility interface. It is divided into two main sections: 'Old Product' and 'New Product'.

Old Product:

Category	WIX WIX FILTERS	
Follows		
Part Number	15017	GASKET
On Hand	13	
On Order		

New Product:

1: Category	WIX WIX FILTERS	
3: Follows		
5: Part Number	15029	

Any change? 1.

1. Enter the Category / Part of the item you wish to transfer
2. Enter the Category / Part where you would like to transfer the part to

Product History Transfer

6. Inventory > 1. Data Maintenance > 5. Utilities > 3. Product History Transfer

This option takes only the history of an old number, and merges it with an existing number. No on hand information is transferred in this routine.

		Category	Category Description	Part Number	Part Description
1	FROM Part Number	.....	.....	.....	.....
2	TO Part Number	.....	.....	.....	.....
7	(A)dd sales history together or (R)eplace History?			.	
8	FROM Part Number Description To Become			.....
9	Alternative Description			.....	Press ENTER to use this Default

1. Enter the OLD part number
2. Enter the NEW part number
3. Choose whether to append to or replace the history of the new part with the old part.
4. Optionally change the description of the number you are transferring to
5. Optionally change the alternative description

Transferring ranges of items

Before running any category based transfer routines, it is always suggested to run a category resequence

Inventory > **1. Data Maintenance** > **5. Utilities** > **1. Category Resequencing**

Category Transfer

9. System Utilities > 6. inventory > 4. Category Transfer

This utility should be used when moving all or part of a category to a NEW category. In this routine, the new category should not yet exist. You can, however, choose only a portion of the old category to move.

A stock status report can be very useful in determining the start and end of a category

The screenshot displays the 'Category Transfer' utility. At the top, there is a title bar 'Category Transfer'. Below it, a form is shown with the following elements:

- Line 1: 'Old Category' field with a dotted line for input.
- Line 2: 'Product Range' field.
- Line 3: 'Starting Part Number Follows' field.
- Line 4: 'Starting Part Number' field.
- Line 5: A blank field.
- Line 6: 'Ending Part Number' field.
- Line 7: A blank field.
- Line 8: A blank field.
- Line 9: 'New Category' field with a dotted line for input.

In the center, there is a table with two columns: 'Part Number' and 'Description'. The table has three rows:

	Part Number	Description
3
5
7

1. Enter the old category which you want to move product out of.
2. Select the starting and ending part number for the range that you wish to move. If you are moving the entire category, you can press ENTER to default to start/end of the category.
3. Enter the new category into which you want to move the product.

Category Merge

9. System Utilities > 6. Inventory > 4. Category Merge

This utility should be used when moving all or part of a category to an EXISTING category. This routine will add items to the new category and merge the history of any duplicated items

A stock status report can be very useful in determining the start and end of a category

		Category Merge	
Adding After			
1	Category	.....	.....
3	Part Number	.....	.....
Start With			
5	Category	.....	.....
7	Part Number	.....	.....
9	Follows	.....	.....
End With			
11	Part Number	.....	.....
12	Overwrite On Dup?	.	

1. Enter in the category you wish to add the parts to. (it should skip past field 3 (Part number))
2. Enter the category you wish to move parts out of.
3. Select the starting number you wish to move
4. Select the ending number you wish to move
5. Overwrite on dup? Y = replace any duplicates; N = merge any duplicates

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