

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 window. It is divided into two main sections: 'Old Product' and 'New Product'.

Old Product Section:

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

New Product Section:

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

At the bottom of the window, it says '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.

Product History Transfer

| | | 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 shows a terminal window titled "Category Transfer". It contains several input fields and a table. At the top, there is a label "Category Transfer" in a box. Below it, there is a field labeled "1" with the text "Old Category" and a series of dots for input. Below that is a field labeled "Product Range" in a box. In the center, there is a table with two columns: "Part Number" and "Description". The table has four rows. The first row is a header with a yellow background. The second row has a label "3" and the text "Starting Part Number Follows". The third row has a label "5" and the text "Starting Part Number". The fourth row has a label "7" and the text "Ending Part Number". Below the table, there is a field labeled "9" with the text "New Category" and a series of dots for input.

| | Part Number | Description |
|---|------------------------------|-------------|
| 3 | Starting Part Number Follows | |
| 5 | Starting Part Number | |
| 7 | Ending Part Number | |

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 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

Revision #3

Created 28 September 2018 15:26:18 by Admin

Updated 4 October 2021 16:37:47 by Shelley