



Item Transfers

Moving stock between stores — a single item on the spot, a bin down the aisle, or a bulk move to another warehouse with freight added

Introduction

Whenever stock needs to move from one place to another inside Data Fusion — a single item moved on the spot, stock relocated to a different bin, or a full multi-item move to another warehouse — it's called a transfer. Every transfer works the same way underneath: stock leaves a FROM location at that location's own average cost, and arrives in a TO location, re-blending against whatever is already there.

Data Fusion gives you two ways to do this:

- **Quick Item Transfer** — for moving one item at a time, instantly.
- **Bulk Item Transfer** — for moving several items together on one document, built up in stages, with the option to add freight/landed costs.

Note: A bin or specific location is not a separate concept from a warehouse — it's simply a Store set up at a more granular level. Both transfer methods below work exactly the same way whether the FROM or TO location is a whole warehouse or one labelled bin.

Before You Begin — Prerequisites

- The item you want to move must already exist in Data Fusion, with stock recorded in the FROM location.
- Both the FROM and TO locations must be set up and marked active — this includes bin/location-level stores just as much as whole warehouses.
- You need permission to use Stock Control to reach either transfer screen.
- If your company uses lot numbers, know which lot you're moving — Quick Transfer lets you pick a specific lot; Bulk Transfer shows a lot dropdown once an item and quantity are chosen.



Key Terms — Glossary

Term	What It Means
Quick Item Transfer	The single-item transfer screen. Pick FROM store, TO store, click the item, enter a quantity, confirm — done immediately.
Bulk Item Transfer	The multi-line transfer document. Add as many item lines as you need, save it, then move it through New → Started → Complete.
Bin / Location	A Store set up at a granular level (e.g. a specific shelf or bin) rather than a whole warehouse. Transfers treat it exactly like any other store.
Transfer Slip	The document created for a Bulk Item Transfer — has its own number, a From/To store, a reference, and one or more item lines.
New / Started / Complete	The three stages a Transfer Slip moves through. New = still being built, fully editable. Started = locked for editing, ready to action. Complete = stock has actually moved.
Additional Cost (Freight)	An optional cost added on a Bulk Transfer, spread evenly per unit across everything on the slip and added to the destination location's cost only.

Where This Happens

Task	Data Fusion	Sage
Move a single item between two locations	✓ (Quick Item Transfer)	
Move several items together, or between whole warehouses	✓ (Bulk Item Transfer)	
Move stock into or out of a specific bin	✓ (either method — a bin is just a store)	
Add freight/landed cost to a transfer	✓ (Bulk Item Transfer only)	Optional — only if you tick the Sage box update



Part 1 — Quick Item Transfer (a single item, right now)

Use this for one item you want to move immediately — including moving something into or out of a specific bin.

1. Go to Stock Control > Inter Store Transfer.
2. Choose the FROM location from the first dropdown — this can be a whole warehouse or a specific bin/location.
3. The item list for that location loads automatically. Use **Find Item** to search by code or description if the list is long.
4. Choose the TO location from the second dropdown — again, any store, including a bin. Its current On Hand list loads on the right so you can see what's already there.
5. Click the **lot number link** (or the placeholder link if your company doesn't use lot numbers) next to the item you want to move. A pop-up opens showing the item, the FROM → TO locations, and the maximum quantity available.
6. Enter the quantity to transfer and click OK.
7. **The transfer happens immediately** — stock leaves the FROM location and arrives in the TO location, and both grids refresh to show the new balances.

⚠ Important: Quick Item Transfer has no option to add freight or any other cost. If you need to land a cost on the move, use Bulk Item Transfer instead (Part 3 below).

Part 2 — Moving Stock To or From a Bin/Location

There is no separate “bin transfer” screen or feature. Because a bin or specific location is simply a Store set up at a finer level of detail, moving stock into or out of one uses exactly the same Quick or Bulk transfer process described in this guide — you just choose that bin as your FROM or TO location instead of a whole warehouse.

- **Moving a single item to a bin:** use Quick Item Transfer, with the bin as the TO location.
- **Relocating several items to a bin, or across a whole warehouse re-organisation:** use Bulk Item Transfer.
- **Every stock function already understands bins:** On Hand quantities, average cost, and transfer history all work at bin level exactly as they do at warehouse level.



Part 3 — Bulk Item Transfer (multiple items, or with added freight)

Use this when you want to move several items together as one document, when you want to build the transfer up over time before actioning it, or when you need to add freight/landed costs to the move.

8. Go to Stock Control > Transfers to see the list of existing transfer slips.
9. Click **Add New Transfer** to create a new slip (status *New*). You're taken straight to the transfer slip screen.
10. Choose the From Warehouse and To Warehouse (either can be a bin/location), enter a Reference (required) and, optionally, Notes and a date.
11. On each line: select the item, and if your company uses lot numbers, pick the lot. The On Hand quantity for both the FROM and TO location appears automatically. Enter the **Qty to Transfer**, then click the **save icon** on that line.
12. A new blank line appears automatically once the current line is saved, so you can keep adding items. Use the red **delete icon** to remove a line you no longer need (only available while the slip is still *New*).
13. If freight or another landed cost applies to this move, enter it in **Add Shipping Costs** while the slip is still *New*. Optionally tick **Update item average cost in Sage?** if you also want Sage's average cost updated — see Understanding Freight Costs below for what this actually does.
14. When all lines are entered, click **Save Edits** to save your header details, or **Print Preview** to view the transfer slip as a PDF at any point.
15. Click **Start Transfer** once every line has an item and a quantity. This locks the slip (status *Started*) — lines can no longer be edited or deleted.
16. Click **Complete Transfer** to actually move the stock. This is the step that takes the quantities off the FROM location and puts them into the TO location for every line on the slip. The slip's status changes to *Complete* and it comes off the active list.

Understanding Freight Costs on a Bulk Transfer

Freight entered on a Bulk Transfer is spread evenly per unit across everything on the slip, and added to the cost of the stock at the destination location only — the stock leaving the source location keeps its existing cost, unaffected.

- **Data Fusion's own figures always update.** The destination location's average cost re-blends to include the freight, whether or not you tick the Sage box.
- **Updating Sage is optional.** If ticked, Sage's average cost is lifted too — but because Sage holds only one average per item for the whole company (not per location), the freight raises Sage's single company-wide average, spread across all stock on hand everywhere, not just the units that were transferred.



Understanding Quick vs. Bulk Transfer

- **Quick Transfer is instant.** There's no in-between state — as soon as you confirm the quantity, the stock has moved. There's nothing to review or approve afterwards, and no cost can be added.
- **Bulk Transfer is staged.** You can build the document up over several visits, save it, and come back to it — stock only actually moves once you click Complete Transfer, not when you save or start it.
- **Both post the same way underneath.** Either method removes stock from the FROM location at that location's current average cost and adds it into the TO location, re-blending the destination's average cost against whatever was already sitting there.
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Reviewing Transfer History

There isn't a transfer-only history screen — instead, use the Item Movement History report, which covers every stock movement type, transfers included:

17. From the Transfers list (or the history screen itself), open Item Movement Select.
18. Filter by **Item**, **Category**, **Out From Store**, **Into Store**, **Transaction Type** and a date range. To see transfers only, set Transaction Type to *TRF*.
19. Click View to see the results: item, lot number, transaction type, linked document, quantity, From/To location, date and who did it.
20. Click **Excel** on the results screen to export the movements shown to a spreadsheet.

Common Mistakes to Avoid

- **Choosing the same location as both FROM and TO.** Bulk Transfer blocks this with an error; make sure the two are genuinely different before saving.
- **Forgetting to click Start Transfer, then Complete Transfer.** On a Bulk Transfer, saving your lines is not the same as moving the stock — nothing happens to your stock levels until you click Complete Transfer.
- **Entering a quantity larger than what's on hand.** Both screens check the FROM location's available quantity and will reject the transfer/line if you try to move more than is there.
- **Expecting to add freight costs on a Quick Transfer.** That option only exists on the Bulk Item Transfer screen.
- **Expecting Sage's average cost to match a specific location's average.** Sage has one average per item for the whole company; Data Fusion has one per location. They will not be the same number, and that's by design.
- **Deleting a transfer slip expecting it to reverse a completed move.** Only delete a slip while it's still New. Once a transfer has been completed, the stock movement has already happened.