Warehouse Transfers — Everyday Workflow

Moving stock between stores, day to day

Introduction

A transfer moves stock from one store to another inside Data Fusion — for example from your main warehouse to a van, a branch, or a specific bin location. Data Fusion gives you two ways to do this:

- **Quick Item Transfer** — for moving one item at a time, on the spot, with an instant confirmation.
- **Bulk Item Transfer** — for moving several items together on one document, which you can build up, review, and action in stages.

This guide covers the everyday, no-extra-cost version of both workflows, plus how to review what has already been transferred.

> **Note:** If you need to add freight or other landed costs to a transfer, see the separate guide “Additional Costs — Receiving and Transfers”. That option only exists on the Bulk Item Transfer screen, not on the Quick Item Transfer screen, and is not covered again here.

Before You Begin — Prerequisites

- The item you want to move must already exist in Data Fusion, with stock recorded in the FROM store.
- Both the FROM store and the TO store must be set up and marked active. This includes bin/location-level stores — see “Multiple Stores and Bin Location Flexibility” if you're transferring into or out of a specific bin rather than a whole warehouse.
- 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 will show 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 (Stock Control > Inter Store Transfer). Pick FROM store, TO store, click the item, enter a quantity, confirm — done immediately.
Bulk Item Transfer	The multi-line transfer document (Stock Control > Transfers list). Add as many item lines as you need, save it, then move it through New → Started → Complete.
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 and fully editable. Started = locked for editing, ready to action. Complete = stock has actually moved.
On Hand (Q O H)	The quantity currently available in a store. Shown for both the FROM store (what you can take) and the TO store (what's already there) before you commit the transfer.
Item Movement History	A report of all stock movements (transfers and other transaction types) between stores, filterable by item, store, date range and transaction type.

Where This Happens

Task	Data Fusion	Sage
Move a single item between two stores	✓ (Quick Item Transfer)	
Move several items together on one document	✓ (Bulk Item Transfer)	
Store On Hand quantities are adjusted	✓ (both stores, automatically)	
Review transfer/item movement history	✓	
Sage item average cost updated		Only if you tick the optional Sage update box (see Additional Costs guide)

The Full Workflow — Quick Item Transfer

Use this for a single item you want to move right now.

1. Go to Stock Control > Inter Store Transfer.
2. Choose the FROM store from the first dropdown.
3. The item list for that store loads automatically. Use **Find Item** to search by code or description if the list is long.
4. Choose the TO store from the second dropdown. 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 stores, and the maximum quantity available.
6. Enter the quantity to transfer and click OK.
7. **The transfer happens immediately** — stock leaves the FROM store and arrives in the TO store, and both grids refresh to show the new balances.

The Full Workflow — Bulk Item Transfer

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

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, 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 store 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. 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.
14. 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.
15. Click **Complete Transfer** to actually move the stock. This is the step that takes the quantities off the FROM store and puts them into the TO store for every line on the slip. The slip's status changes to *Complete* and it comes off the active list.

> **Tip:** “Add Shipping Costs” also appears on this screen while the slip is New — that's for freight/landed-cost transfers and is covered in the separate Additional Costs guide, not here.

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.
- **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 store at that store's current average cost and adds it into the TO store, re-blending the destination store's average cost against whatever was already sitting there.
- **Use Bulk Transfer for anything with multiple items**, or where you want a printable Transfer Slip and a paper trail of who reference-tagged the movement and why.

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:

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

Common Mistakes to Avoid

- **Choosing the same store as both FROM and TO.** Bulk Transfer blocks this with an error; make sure the two stores 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 store'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 — use it instead if you need to land shipping costs on the destination store's value.
- **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.