



Feature of the Month July, 2013

V9 Merge Inventories with Auto Transfers

If you have a closing or seasonal store and moving the inventory to another location, you don't have to do manual transfers for each item to the store, you can use auto transfers to merge the inventoried together all at once. Here is how it is done.

In Retail Pro V9 go to Transfers > Auto Transfer
The Auto Transfer Wizard will guide you through the process



Select Transfer Slips for and immediate transfer of the product

The screenshot shows the 'Auto Transfer Wizard' window at the 'Source. Document Details' step. The left sidebar lists the steps: Begin Process, Source. Document Details (selected), Source. Distribution Options, Source. Analysis Options, Target. Location Details, Target. Distribution Options, Target. Analysis Options, and Process Complete. The main content area is titled 'Document Details (Source)'. It contains the following fields and options:

- Document Details (Source)**
The settings you define on this screen will be used when generating proposed Transfer Orders or Slips.
- Select the type of document you want to generate:
 - Held Transfer Slips
 - Transfer Slips
 - Transfer Orders
- Enter or select the associate for the documents generated during this process.
Associate:
- Enter or select Order and Activate dates for the generated documents. The Activate date can optionally be defined as any number of days from the Order Date by selecting the checkbox and selecting the number of days.
Order date:
Activate date: Days from Order Date
- Specify any notes you want written on the Transfer Orders/Slips.
Note 1:
Note 2:

At the bottom, there are buttons for Back, Next (highlighted), Skip, Cancel, and Finish.

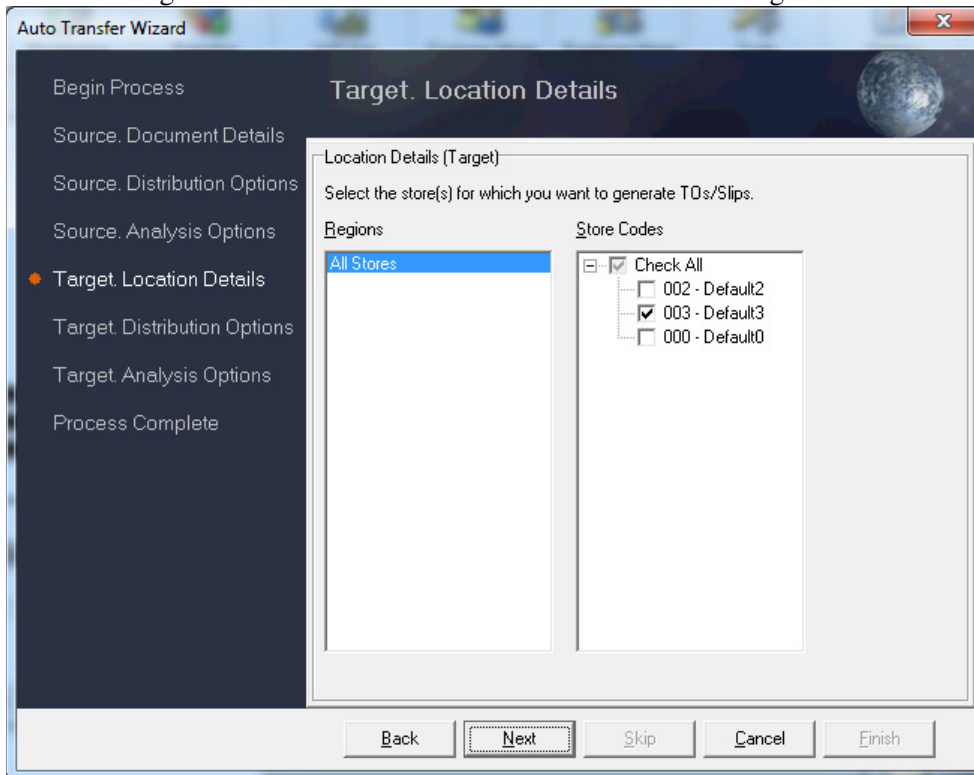
Select the store source where the product is coming from Be sure to clear out the filter and select force distribution to 100%

The screenshot shows the 'Auto Transfer Wizard' window at the 'Source. Distribution Options' step. The left sidebar lists the steps: Begin Process, Source. Document Details, Source. Distribution Options (selected), Source. Analysis Options, Target. Location Details, Target. Distribution Options, Target. Analysis Options, and Process Complete. The main content area is titled 'Distribution Options (Source)'. It contains the following fields and options:

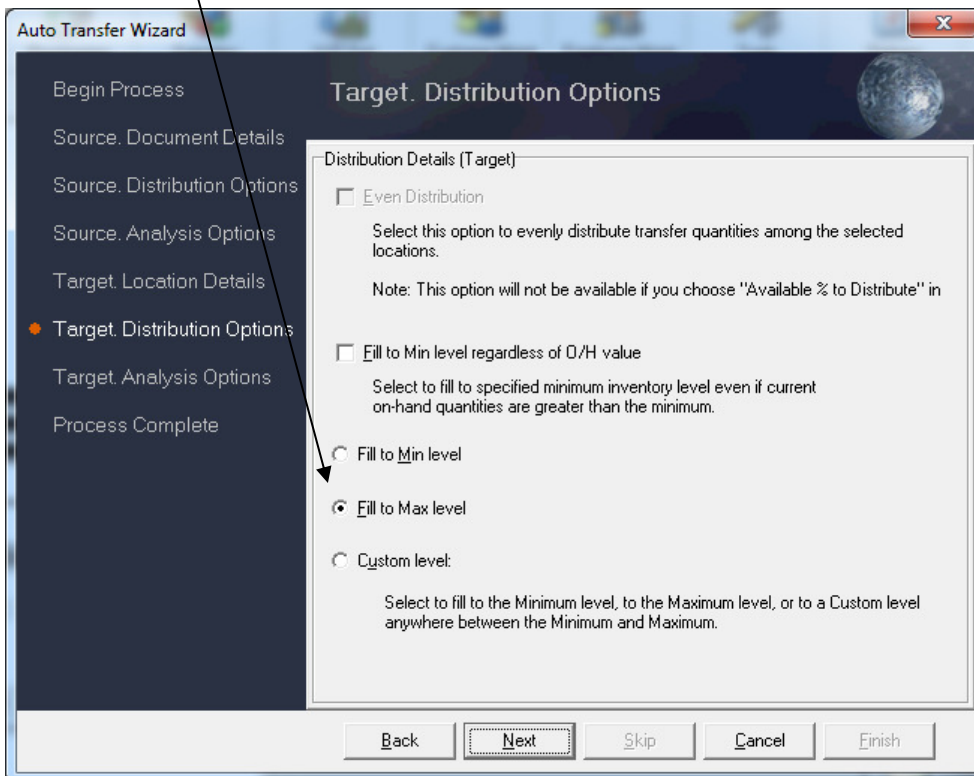
- Distribution Options (Source)**
Select the store you wish to use as the source for your analysis for proposed TOs/Slips.
Store:
- By default, the wizard will include all qualifying items when generating TOs/Slips. Optionally, you can define criteria for a filtered set of items. Select a filter or select Edit to define new criteria.
Filter:
- Specify the percentage of the source store's inventory that you want to be distributed. Your selection will apply to all items proposed for the TOs/Slips.
 - Available % to distribute
 - Force distribution %
 - Specified Qty to distribute

At the bottom, there are buttons for Back, Next (highlighted), Skip, Cancel, and Finish.

Uncheck the analysis options as all the inventory will need to be transfer from the source location.
Select the target location where the transferred merchandise will go

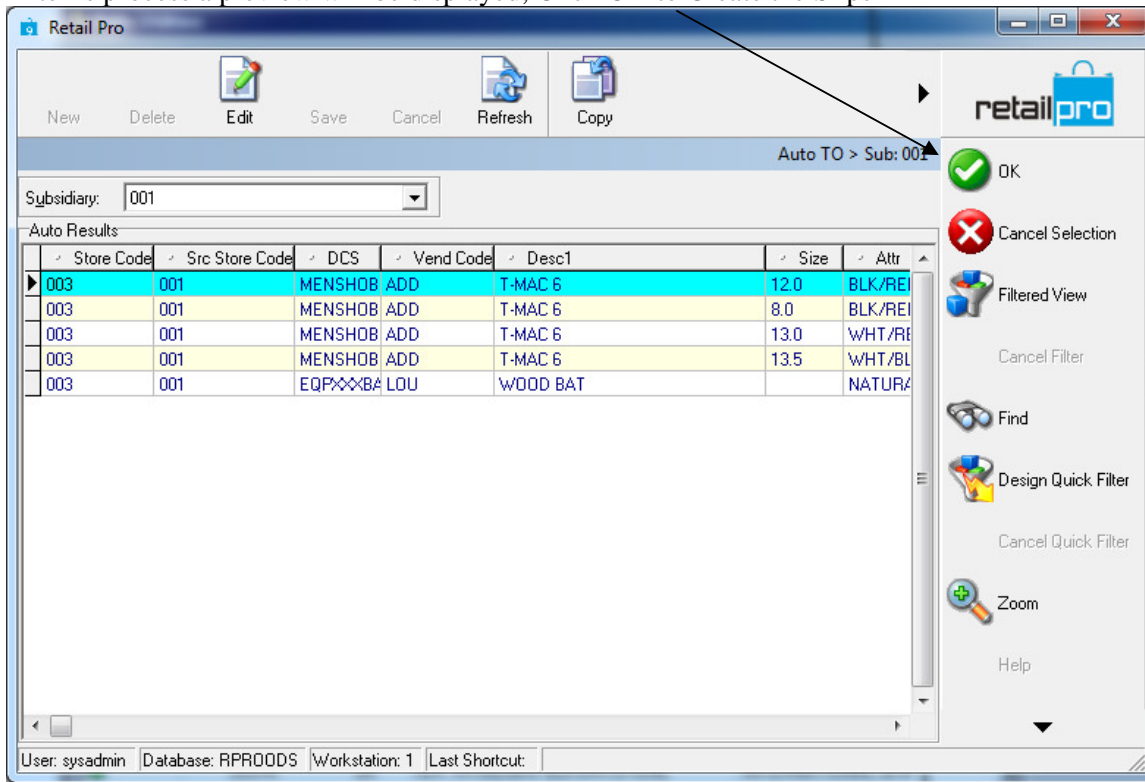


Select Fill to Max level

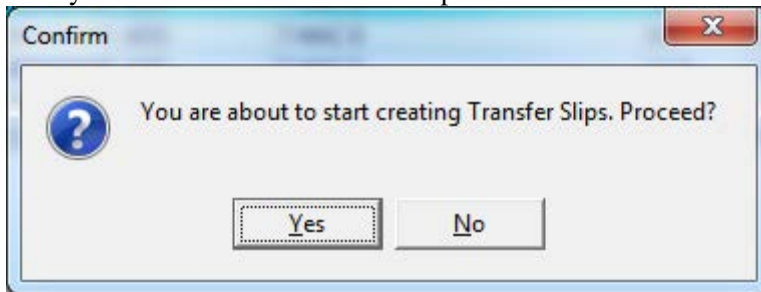


Uncheck all the Target Analysis Options

After is process a preview will be displayed, Click OK to Create the Slips



Verify the creation of the transfer Slips



All the positive quantities from the source store are now transferred to the destination store. NOTE: This will not move negative quantities, only positive so to zero out the source store you will need to do a zero out Physical Inventory (Or manually transfer items from the destination back to the source to make up the difference)