

# **Product Management**

## ***Store Transfers***

If you are managing multiple stores as a single business in Fuse5, you can move product between stores using the Store Transfers module. What this does is move inventory from store A to store B in a controlled fashion and integrate the transfer with the Delivery module so the drivers can manage the delivery.

Update as of 1/23/14: When a Store Transfer is completed, we will no longer decrease qty on hand instantly in the FROM. Instead we will Allocate the quantity and also link it to "Outgoing Store Transfer Qty".

When it's received in the TO location, then Qty on Hand, Qty Allocated and OSTQ will all 3 decrease the same.

In the To, the ST will show as Qty On Order. When you receive it in the To, then Qty On Order will go down and Qty on Hand will increase.

OLD - When a ST was finalized at the 'From' location, Fuse5 would immediately reduce 'Quantity On Hand' and increase 'Outgoing Store Transfer Quantity'. For PO's, Fuse5 would order based on 'Quantity On Hand'.

NEW - When a ST is finalized at the 'From' location, Fuse5 will increase 'Outgoing Store Transfer Quantity' and increase 'Quantity Allocated' but not reduce 'Quantity on Hand'. For PO's, Fuse5 will now consider 'Outgoing Store Transfer Quantity'.

The process of creating a store transfer is very straightforward. Simply choose the locations you are moving product to/from at the top, identify the product and quantity you want to transfer, and click "Save and Continue" or "Finalize". If you save it, you can come back to it later and finalize it. When you finalize a Store Transfer the inventory does the following: At the From location, it goes from Qty Onhand to Outgoing Store Transfer Qty. At the To location, it appears as Qty On Order. This is where the inventory will be while the parts are in transit from one location to another, meaning from the time the store transfer is finalized until the time it is received into inventory at the To location.

## Fuse5 Training Materials

Location Information	
Qty Onhand	10
Qty Scanned	
Qty Consigned	
Qty Allocated	
Qty Onhand Tooltip	QoH updated on 06-1 from -1 to 0
Forecast GRP	
Min GP Percent	1.00
Part Taxed	Conditionally No
Total Available	10
ST Qty Available	
Outgoing Store Transfer Qty	1
Total QoH + Consigned	10
Core Qty On Hand	
Defect Qty on hand	
Warranty Qty On Hand	
Qty On Order	2

You are able to view more details on both Outgoing Store Transfer Qty (by clicking on the number, in this example “1”)......

Transaction Details

Location: Bora Bora

Fix QoO & Close

PO Details

PO Date	PO #	Qty on Order	Qty Received	Qty Cancelled	Qty Back Order
No data found.					

Inbound ST

ST Date	ST #	Qty on Order
15-Apr-2013	TRN11626	1
15-Apr-2013	TRN11637	1

Outbound ST

ST Date	ST #	PSTQ
28-Mar-2013	TRN11592	1

.....and you can view more details about Qty On Order by clicking the number (in this example the number “2”).

Transaction Details

Location: Bora Bora
Fix QoO & Close

**PO Details**

PO Date	PO #	Qty on Order	Qty Received	Qty Cancelled	Qty Back Order
No data found.					

**Inbound ST**

ST Date	ST #	Qty on Order
15-Apr-2013	TRN11626	1
15-Apr-2013	TRN11637	1

**Outbound ST**

ST Date	ST #	PSTQ
28-Mar-2013	TRN11592	1

Once the parts are received at the TO location they will be eliminated from Outgoing Store Transfer Qty at the FROM location and become Qty Onhand at the TO location, leaving Qty on Order at the TO location.

### Create Store Transfer

You can create store transfers by going to PRODUCT MANAGEMENT > STORE TRANSFERS and then use the + button to create a new store transfer.

The functionality of the Create Store Transfer option is very similar to creating Purchase Orders.

Save Data as Template / Saved Templates – After creating a store transfer you can save the template and it will be available for use again. This allows you to save regularly used ST templates so creating them in the future is easier.

Saved Templates: ray   

The calendar icon with the orange x allows you to delete templates.

The orange triangle with an ! Point allows the user to create ST alerts.

The third icon allows you to choose which users will have access to the template.

## Fuse5 Training Materials

Create ST Alert

Add Report Alerts for Edit ST Template

Fuse5

Generate Report on : 02-28-2013

Every : ☒ Monday ☒ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday

Every : -- of Each Month

Time : 00

Create ST : ☐ Save as Pending

» And / Or

» And / Or

» And

Add Report AlertClose

List of Alerts for Edit ST Template Report

Showing 1 - 3 of 3

#	Alert At	Tool	#	Alert At	Tool
1	On 02-28-2013 Time: 00:00:00		2	Every Monday Time: 00:00:00	
3	Every Tuesday Time: 00:00:00				

**From Location** – Location that has the product that you are shipping it away from.

**To Location** – Location needs the product and you are shipping it there to add to inventory.

**ST Type** – Options are similar to PO options (See Purchase Order Types above)

**Created Time** – defaults to current time and date

**User** – defaults to the logged in user

**Linecode** – allows you to enter a linecode for ordering purposes. This is a shortcut to use if you don't want to pick the linecode from the “Select Linecode” function below.

Store Transfer Information	
From Location	Dubuque
To Location	Clinton
ST Type	--RETURN TO ZERO
Created Time	04:31 AM 05-23-13 (HH:MM AM/PM Month-Date-Year)
User	admin
Linecode	TRN


**Print Pick Ticket** – allows you to print a pick ticket based on the product on the store transfer

**Export as CSV** – allows you to export the product from the store transfer to a spreadsheet (CSV stands for Comma Separated Value)

**Count towards outbound SH** – Check this if you want the store transfer to count towards the “from” locations sales history

**Include Consignments** – Do you want consigned product to be considered as part of inventory in both locations when creating an order to X store transfer? Check this box if you do.

**Consider Reorder = NO** - When doing an O2X ST, by default Fuse5 only considers transferring parts with a reorder = yes in the TO location. However, if this box is checked, we'll ignore the reorder = yes/no field and order any part with a QoH+QoO less than the Part X.

Linecode	<input type="text"/>
Count towards outbound SH	<input checked="" type="checkbox"/>
Include Consignments	<input type="checkbox"/>
Consider Reorder = NO	<input type="checkbox"/> 

Save Data As Template:

**From Location Inventory** – allows you to protect min, max, or order point at the from location (only pops up if you are doing an order to X store transfer)

From Location Inventory			
<input checked="" type="radio"/> Unprotected	<input type="radio"/> Protect Min Qty	<input type="radio"/> Protect Max Qty	<input type="radio"/> Protect Order Point

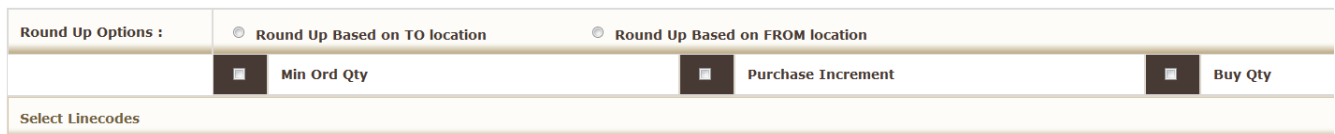
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Round Up Options - Store Transfer increments are available at the Create Store Transfer module. From the Store Transfer module Users have the ability to select three round up options as the increment to be transferred. The increments are set in the product record. The round up options are the Min Ord Qty, Purchase Increment, or Buy Qty.

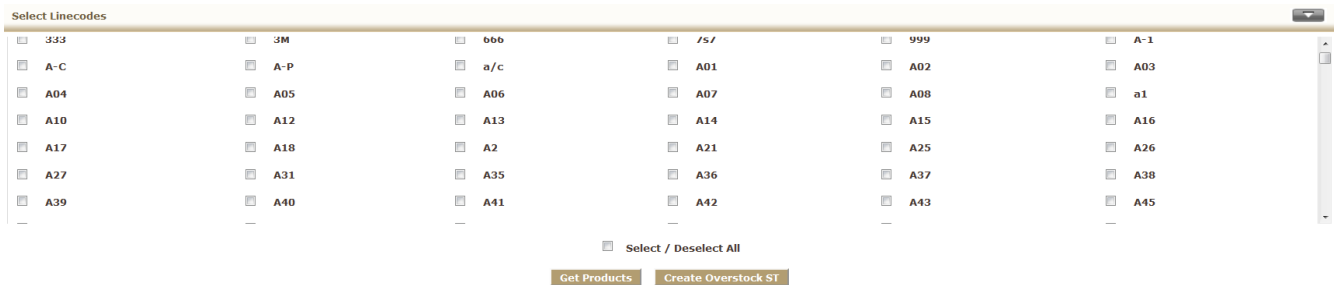
Additionally, Users have the ability to select whether Fuse5 will look at the product record at the To or From location for the increment.

Round up Based on TO location is best used when the increment that you desire to transfer is going to be different based on the location you are sending it to.

Round up Based on FROM location is best used when the increment that you desire to transfer is going to be the same for all locations.



**Select Line codes – drop down button** allows you to view all line codes and select those you want to transfer if doing an order to x ST type



**Get Products** – will populate the store transfer with product based on the criteria you have created.

**Create Overstock ST** – will generate a series of store transfers from other locations that are over the ordering point selected on the ST prior to adding them to the ST you are creating.



**TEMPLATES:** You can save a store transfer as a template that can be accessed again, similar to doing templates with Purchase Orders.

Line Items on the Store Transfer:

**Barcode #, Line Code, Product #, and Product Name** – product descriptive information

Transfer Product Details				
#	Barcode #	Line Code	Product #	Product Name
1	<input type="text"/>	DCC	<input type="text" value="2000"/>	<input type="text"/>
			            BG	Last Years Sales: 0 YTD Returns: 0 Last Year Returns: 0

Icons Under the Product Number (you can hover over them to see the names)

**Camera Icon** – Allows you to see the product image if it's available in the catalog

**Calendar Icon** – Allows you to go into the product record

**Export ST Detail Icon** – Allows you to export the product(s) from the ST to a spreadsheet

ExportSH

Selected part	<input checked="" type="radio"/>
All parts on the page	<input type="radio"/>

Submit

**Sales History Graph** – Allows you to access the sales history graph for that product

**BG (Buyers Guide) Icon** – Allows you to access the buyers guide in the catalog for this product (if you

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*have the catalog service and if the product is in the catalog)*

**Trash Can** – Allows you to delete products from the ST


TA (From Location)	TA (To Location)	QoH (To Location)	Suggested Transfer Qty	Actual Transfer Qty
4	0	0	5	4
MTD: 0 YTD: 0 Last 12M: 1				5, 15, 10

**TA (From Location)** – total available at the from location

**TA (To Location)** – total available at the to location

**Suggested Transfer Qty** – populates if doing an “order to X” ST type

**Actual Transfer Qty** – populates with “1” unless doing a “order to X” ST type. You can manually adjust this field.

TA After Transfer (From Location)	TA After Transfer (To Location)	Core Cost	Cost	
0	4	0.000	34.6	

**TA After Transfer (From Location)** – total available at from location based on transferring the quantity in the Actual Transfer Qty option

**TA After Transfer (To Location)** – total available at the to location based on transferring the quantity in the Actual Transfer Qty option



## Fuse5 Training Materials

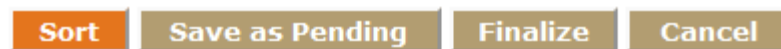
**Core Cost** – from product record

**Cost** – current cost in the product record

**Add Product button** – allows you to add more product

**ST Comments** – allows you to add comments to the ST

### Finalizing the Store Transfer:



**Sort** – Re-orders the product in numerical order by Product #

**Save As Pending** – Save the ST as pending, allows you to select whether or not to allocate inventory, but takes no other action with the ST.

A dialog box titled 'Allocate Inventory'. It has a 'Yes' radio button selected and a 'No' radio button. Below the buttons are two orange buttons: 'Save As Pending' and 'Back to Store Transfer'.

**Finalize** – Finalizes the store transfer.

**Cancel** – Allows you to cancel the ST you are currently working on

### Creating Store Transfers from the Point of Sale

If you attempt to sell a product that you do not have in stock, store transfer is one of the options that can be used to get the product for sale. You can create a store transfer at the point of sale, just like you can create a back order or buy out.

Oversell: do NOT change QOH (but you can edit here ->)		Current QoH : 14
Sell Anyways: Normal Sale (take QoH Negative)		
Buy Out		WH
Backorder		
Store Transfer	Total available QoH from other locations: 291	
Lost Sales		
Quote It		
Cancel		

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From the “Quantity Ordered is greater than Quantity in stock” option, choose Store Transfer. You can create store transfers from one other location, or from multiple locations using the ADD TO ST LIST button.

Quantity Ordered is greater than Quantity in stock

Please enter Store Transfer information for...

Product : wheely bar - Part1 - TRN

Total Available : 0

QoH : 5

Ordered Qty : 15

Required Qty : 15

Location : Dubuque

From Location:

Cedar Rapids (Total Available: 10) ▾

Count towards outbound SH : ☐

Transfer Qty:

1

Transfer Qty to use in this SO:

1

Allocate Inventory:

☒ Yes ☐ No



Auto Receive ST:

☐ Yes ☒ No

ST Comments :

NOTE: If you're transferring from multiple locations use the orange "Add To ST List" button, otherwise, for all single-location store transfers, you only need to hit the brown buttons.

Add To ST List

	ST #	From Location	Count towards outbound SH	Transfer Qty	Transfer Qty To Use in SO	Allocate Inventory	Auto Receive ST	ST Comments
	TRN132	Cascade	No	10	10	Yes	No	
	TRN133	Dyersville	No	5	5	Yes	No	

Add ST

Create Finalized ST and Print

Create Pending ST and Print

Cancel

You will then select the location, quantity, inventory allocation, and finalization option.

### Receive by TRN Number

When the part is delivered to the receiving store, they need to receive it just like product ordered on a PO. At the receiving store they pull up the Receive by TRN Number, (under Product Management >Store Transfers) type in the transfer number, ensure that all of the products are present and if not change the RECEIVED QTY. Once you have decided that the parts you have are the parts on the receiving module hit the VALIDATE PRODUCT LINE button. Once pushed you will be allowed to SAVE.

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**Receive by ST Number**

**TRN# number and Location Information**

Enter TRN # :   Current ( Receiving ) Location :

**Product Details**  
- If the line item is orange, you may double-click to Validate the line.

Delete	Barcode #	Line Code	Product #	Received Qty	Transfer UOM	TRN Number For Receiving Quantity
	<input type="text"/>	<input type="text" value="DCC"/>	<input type="text" value="1971"/>	<input type="text" value="1"/>	1 EACH	TRN11547

The store inventory is incremented accordingly to reflect the new inventory just received.

### Receive by Product (ST)

When receiving a store transfer you do have the ability to receive by product, which allows you to use the bar code scanner. Under Product Management > Store Transfer > Receive by Product (ST).

**Receive by Product (ST)**

Scan ST Items for ST# :

**Product Details**  
- If the line item is orange, you may double-click to Validate the line.  
- This page works for inbound ST  
- Use UP/DOWN key to move from one qty field to the next, always hit ENTER key to update values

Delete	Barcode #	Line Code	Product #	Received Qty	TRN # For Receiving Quantity	ST Cost Price	ST Core Price	Related SO
	<input type="text" value="611269995564"/>	<input type="text" value="TRN"/>	<input type="text" value="Part1"/>	<input type="text" value="1"/>	TRN11620	11.55	0.00	
	<input type="text" value="611269995562"/>	<input type="text" value="TRN"/>	<input type="text" value="Part3"/>	<input type="text" value="1"/>	TRN11620	13.13	0.00	

This functionality is very similar to receiving a PO by product number. When you scan or enter a product number, the TRN# will show up, ST Cost Price, ST Core Price, and a Related SO number if one exists. If a part is on multiple transfers you will have to choose the TRN number you want to associate it with, or if you know specifically which TRN number you are receiving, put that number in the “Scan ST Items for ST#” at the top right prior to scanning in the parts. If the part is on that transfer, it will automatically populate that number under the “TRN for Receiving Quantity” column. When receiving a transfer, if you have parts that are not on the transfer, you do not have the capability to pend to another ST or create an ST from the receiving module. You would need to set the parts aside and create an ST for them in the Create ST module prior to receiving. This functionality is specifically designed to ensure that those users that are doing the receiving are forced to communicate with your other location about parts that were inadvertently sent so you can either return them to the original location or create a ST. Because this receiving affects multiple locations, it is specifically designed to require the extra step.

Once you have received all of your products, delete any blank lines with the trash can, validate the product lines, and hit save.

### Canceling Product from a Store Transfer

You can cancel items off of a FINALIZED store transfer. It used to be that the only way to cancel items off of a finalized ST was to receive it and then cancel the items you did not receive. Now, if you go into the store transfer (from the listings page), there is a "Cancel Items" button on each line. If you click it, it will prompt for the number of items to cancel, and then cancel those items. Now, if your guy in the originating warehouse picking items can't find something, they can go into the ST and cancel that item off. The feature is 100% flexible, meaning you can cancel a portion of Qty on an item, too. Some of our customers have been saving ST as pending until after they where picked, in case their inventory was off and they could not find something. That is no longer necessary. Just finalize it and adjust later.

Item	Core Cost	Cost	Received by	Qty Received	Qty Canceled
4	\$ 0.00	\$ 34.65		0	0
					<button>Cancel Item</button>

How many qty do you want to cancel




**CUSTOM SETTING That Affects Receiving:** There is a custom setting for default treatment (Back order or Cancel) of items not received. This will default all of the checkboxes on the popup you get after receiving, and having some items not received. This is a time saver on large ST with a lot of unreceived items. (This is located in Custom Settings under the “receiving” section and is labeled “Default action on partially received ST popup”)

Default action on partially received ST popup

Backorder ▼

Default action on partially received ST popup - Backorder / Cancel from ST

**Minimum Sell Increment:** During a Store Transfer, when you are getting a product from another location (the "From" location), the Minimum Sell Increment is enforced.

This feature was implemented to require the transfer/purchase of larger quantities of some products from your warehouse location.

If you DO NOT want to use this feature, you don't have to do anything. If you DO want to use this feature, all you have to do is put a number, besides 1 or <blank>, into the Minimum Sell Increment field of the product. It is controlled on a product by product basis at EACH location. Each location can have a different Minimum Sell Increment for a product.

Minimum Sell Increment	?
Selling LHM Type	EACH

This setting is applied during the Sales Order and Store Transfer function.

This is the MINIMUM increment you are allowed to sell of this product for this location.

Notice that this is a LOCATION setting, every location can be different.

This is a feature likely used by a warehouse or distribution center that only sells/transfers things to other locations in big lots.

So, you can set your distribution center to have a minimum sell qty of 12 (probably a case) and the other locations can still sell 1 at a time.

Also, this is not a true MINIMUM. It is a minimum and a purchase increment. So if it is set to 4, you can only sell it in units of 4, 8, 12, etc...

When you create the Sales Order or Store Transfer and put in a Qty other than this, it is rounded up to the increment.

So, in this case, if you put in 1, it rounds up to 4. If you put in 5, it rounds up to 8.

## Store Transfers Received

This is a one page listing of store transfers that have been received. It allows you to see the status of a transfer that you may be curious about. It is accessible under PRODUCT MANAGEMENT > STORE TRANSFERS > STORE TRANSFERS RECEIVED

## Using the Deliveries tab to manage Store Transfers

Under DELIVERIES you will see two additional store transfer options:

1. Awaiting Store Transfers – allows you to view outbound store transfers and view and receive inbound store transfers. You can also use this to show that an ST is being picked, picked, or assigned for deliver.

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Outbound Store Transfers						
Receive ST	InBound	Outbound	Assign Deliveries To	Assigned to Picker	Pick Completed	
Minutes until You're Late	Target Delivery Time	TRN #	TRN# status	From Location	To Location	
More Than 1 Month <b>LATE</b>	08:30 AM 10-24-11	TRN49467	Finalized	Bora Bora	Fiji	
More Than 1 Month <b>LATE</b>	02:30 AM 10-26-11	TRN50608	Finalized	Bora Bora	Fiji	
More Than 1 Month <b>LATE</b>	04:30 AM 10-31-11	TRN37	Finalized	Bora Bora	Fiji	
More Than 1 Month <b>LATE</b>	09:30 AM 11-04-11	TRN487	Finalized	Bora Bora	Fiji	
More Than 1 Month <b>LATE</b>	12:30 PM 11-07-11	TRN681	Finalized	Bora Bora	Fiji	
More Than 1 Month <b>LATE</b>	03:30 AM 11-07-11	TRN717	ST Partially Received	Bora Bora	Fiji	
More Than 1 Month <b>LATE</b>	10:30 AM 11-09-11	TRN912	Finalized	Bora Bora	Fiji	
More Than 1 Month <b>LATE</b>	03:30 AM 11-09-11	TRN969	Finalized	Bora Bora	Fiji	
More Than 1 Month <b>LATE</b>	09:30 AM 11-15-11	TRN1395	ST Partially Received	Bora Bora	Fiji	
More Than 1 Month <b>LATE</b>	09:30 AM 11-17-11	TRN1675	Finalized	Bora Bora	Fiji	

2. ST Delivery Log – allows you to view all store transfers and their current status.

### Setting up Location Priority for Store Transfers

This can be done under Personal & Admin > Settings > Company Details. Select the EDIT button for the location you want to set up. Towards the very bottom of the pop up box is the Location Priority for Store Transfers set up. Simply push the stores from left to right in the order that you would prefer to do store transfers. This will probably be driven by proximity or transportation costs. This is used if you are doing automated store transfers, particularly from a PO.

Location priority  
for store transfers:

Fiji  
Tahiti  
Samoa  
Easter Island  
Cook Islands  
Solomon Islands  
French Polynesia

>>

Samoa  
Easter Island  
Solomon Islands  
French Polynesia  
Cook Islands  
Fiji  
Tahiti

X

### Store Transfer Pricing other than Current Cost

You can set up transfer pricing between locations based on current cost, average landed cost, one of the M Fields, or a sell price plan. The setting to choose this can be found under Personal & Admin > Settings > Company Details. Select EDIT on the location you want to change and choose the line item labeled “Store Transfer Price Based On:”.

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Store Transfer Price Based On :	Current Cost
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This transfer pricing is based off of the location setting and the pricing in product records for the TO location, not the FROM location.