



Process

Documentation

Department:

Customer Support

Last Updated:

1/6/2026 6:02 AM

NAME OF PROCESS

Transferring Items Between Locations

Use Case / Objectives

This document will walk you through how to [create a transfer](#) rental or sales items from one location to another and how to [receive the transfer](#).

Configuration, Training, and Reporting

This document assumes you know how to perform basic Search functionality to find information in the system (i.e., F4 search). The steps for this are not included within this document.

Field definitions for applicable tasks are available in the Reference Glossary. To view these definitions either click on the screen name in the task or scroll to the end of the documentation to view the Glossary.

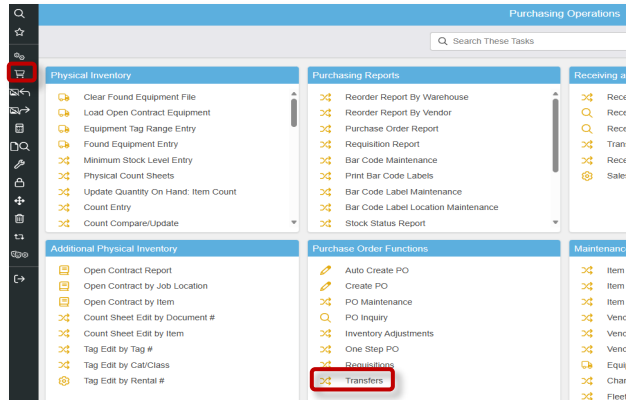
Menu options to access:

Purchasing Operations => Purchase Order Functions => Transfers

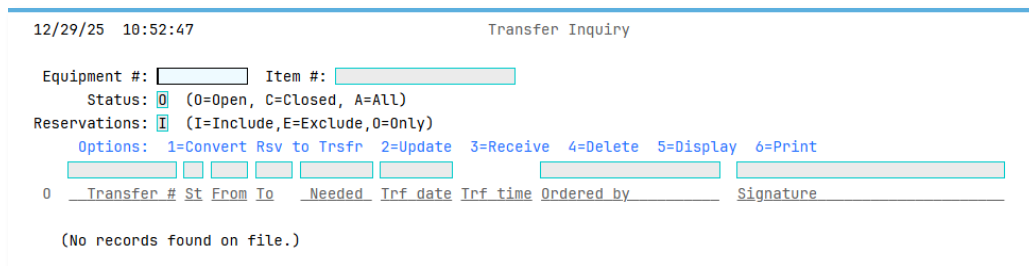
Create Transfer

Process Steps

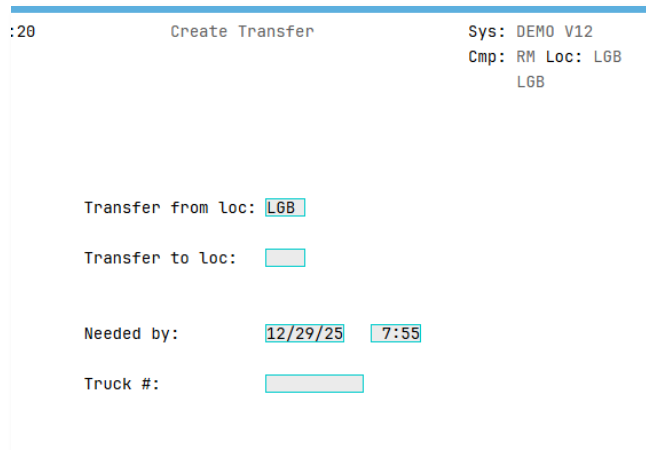
1. Log into the [Roleplay Environment](#) using your credentials.
2. Select the **Purchasing Operations** menu from the left toolbar.
3. In the **Purchase Order Functions** section, click on the **Transfers** option.



- a. The **Transfer Inquiry** screen opens displaying any current transfer records in the system. **NOTE:** For this example, there are no existing records.



4. Press F5 on your keyboard or click on the **F06 Create Transfer** option in the **Display Functions** menu.
 - a. The **Create Inventory Transfer - Launch** screen opens.



- Type in the *Transfer from loc* (if different than default value), *Transfer to loc*, *Needed by* (if different than the current date) and the *Truck #*. **NOTE:** If necessary, you can press F4 to search in all fields *except* the *Needed by* field. **NOTE 2:** If you are not transferring truck stock to another truck or location, you can leave the *Truck #* field BLANK.

- Press Enter.
 - The Create Transfer Equipment Information screen displays.

- Type in the *Equipment #* that will be transferred or type 1 in the *Opt* column and press Enter to Search.

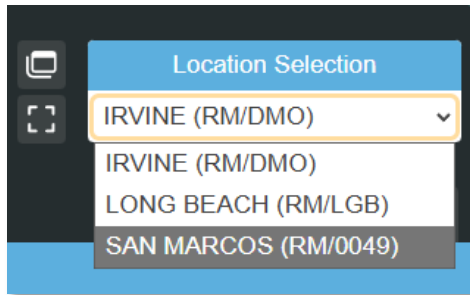
8. Review and press Enter to create the transfer.
 - a. The **Truck Dispatch Display** screen opens, and the transfer created displays in the table.

12/29/25 12:13:29		Truck Dispatch Display				Sys: DEMO V12																									
Sorted by: Date, Truck, Load, Seq#		Mode: ALL Locs		Invoice: <input type="text"/>		Cmp: RM Loc: DMO																									
Options: Options: 2=Change 3=Copy 4=Delete 5=Display 9=Lin Cmt or Status: A,C,D or *																															
Open: <input checked="" type="checkbox"/> Posted: <input type="checkbox"/>		From: 12/29/25 To: 12/29/25		Eqp #: <input type="text"/>		Cat-class: <input type="text"/> - <input type="text"/> Exp timer: <input checked="" type="checkbox"/> (Y/N/O) Tot wght: <input type="text"/>																									
<table border="1"> <thead> <tr> <th>Q</th> <th>S</th> <th>C</th> <th>Time</th> <th>Date</th> <th>Truck #</th> <th>Load/Seq</th> <th>Equipment</th> <th>N</th> <th>Job loc</th> <th>Qty</th> <th>Loc</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>I</td> <td></td> <td>12:10</td> <td>12/29/25</td> <td><input type="text"/></td> <td><input type="text"/></td> <td>AIR SAW (14")</td> <td>N</td> <td>TRANSFER FROM: DMO TO: 0049</td> <td>1.00</td> <td>DMO</td> </tr> </tbody> </table>								Q	S	C	Time	Date	Truck #	Load/Seq	Equipment	N	Job loc	Qty	Loc	<input type="checkbox"/>	I		12:10	12/29/25	<input type="text"/>	<input type="text"/>	AIR SAW (14")	N	TRANSFER FROM: DMO TO: 0049	1.00	DMO
Q	S	C	Time	Date	Truck #	Load/Seq	Equipment	N	Job loc	Qty	Loc																				
<input type="checkbox"/>	I		12:10	12/29/25	<input type="text"/>	<input type="text"/>	AIR SAW (14")	N	TRANSFER FROM: DMO TO: 0049	1.00	DMO																				

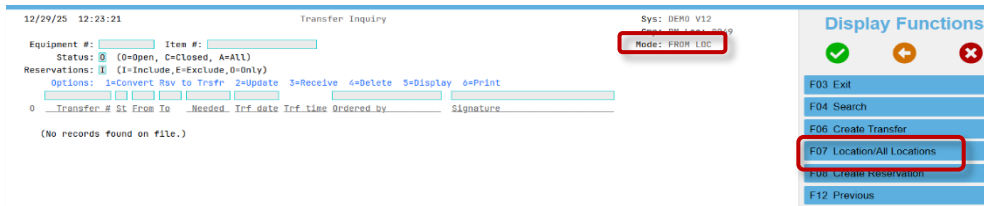
Receive the Transfer

Process Steps

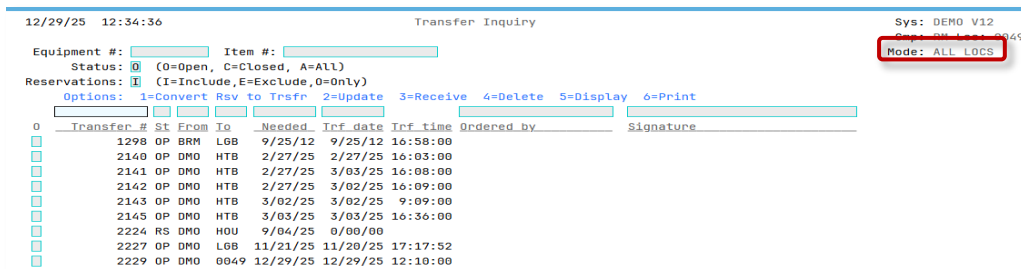
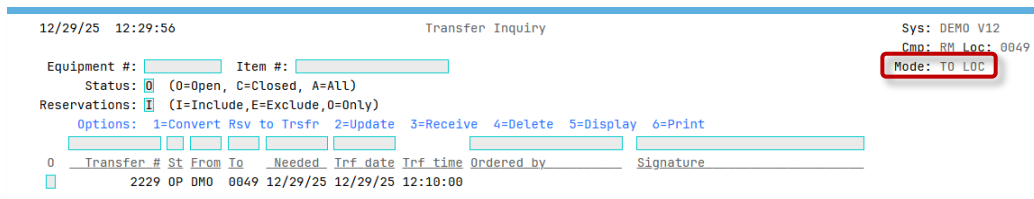
1. In order to receive the transfer, make sure you have access to the location that the transfer is to be received. **NOTE:** For this example, the equipment is being transferred from DMO to 0049.



2. On the Purchasing Operations menu, in the Transaction Processing section, click on the Transfers option.
 - a. The Transfer Inquiry screen opens displaying transfers FROM the current location.



3. Press F7 on your keyboard or click on F07 Location/All Locations in the Display Functions menu.
 - a. The Transfer Inquiry screen refreshes to include transfers TO the current location. **NOTE:** To see transfers to/from ALL locations, click F7 again.



- Find your transfer in the list and type 3 in the 0 field next to the entry.

12/29/25 12:34:36 Transfer Inquiry

Equipment #: [] Item #: []
 Status: 0 (0=Open, C=Closed, A=All)
 Reservations: I (I=Include, E=Exclude, 0=Only)
 Options: 1=Convert Rsv to Trsfr 2=Update 3=Receive 4=Delete 5=Display 6=Print

Transfer #	St	From	To	Needed	Trf date	Trf time	Ordered by	Signature
0								
1298	OP	BRM	LGB	9/25/12	9/25/12	16:58:00		
2140	OP	DMD	HTB	2/27/25	2/27/25	16:03:00		
2141	OP	DMD	HTB	2/27/25	3/03/25	16:08:00		
2142	OP	DMD	HTB	2/27/25	3/02/25	16:09:00		
2143	OP	DMD	HTB	3/02/25	3/02/25	9:09:00		
2145	OP	DMD	HTB	3/03/25	3/03/25	16:36:00		
2224	RS	DMD	HOU	9/04/25	9/09/00			
2227	OP	DMD	LGB	11/21/25	11/20/25	17:17:52		
2229	OP	DMD	0049	12/29/25	12/29/25	12:10:00		

- Press Enter.
 - The **Receive Inventory Transfers** screen opens for the selected entry.

12/29/25 12:38:45 Receive Inventory Transfers Sys: DEMO V12
 Transfer #: 2229 Cmp: RM Loc: 0049

From Loc: DMO IRVINE Mode BY SEQ #
 Signature: [] Print transfer: Y
 Dt/tm/by sent: 12/29/25 12:10 RM0001DA Print Tags: N
 Type receive quantity, press Enter. Bar code Y/N: N
 Total Weight: 0

Equipment	Sent	Received	Description	Yard	Prm
1130	1	[]	AIR SAW (14")		Y

Enter the received quantities and press Enter when finished.

- Type in the quantity received in the *Received* field for each of the items on the transfer.
- Press Enter twice to continue.
 - The **Receive Inventory Transfers** screen closes.
 - The **Transfer Inquiry** screen displays.
 - The received transfer no longer displays in the list.
- To verify the transfer was a success, navigate to the **Equipment File Maintenance** screen for the equipment and verify the *Assigned loc* and *Last loc* fields display as updated.

12/29/25 12:49:14 Equipment Maintenance

Equipment #: 1130 Alternate equip #: [] Converted From #: []
 Cat/class/sub: 00 400 AIR SAW (14")
 Current status: A AVAILABLE Type: R RENTAL
 Make: AT&T Model: PHONE Model year: 07 Cfg#: []
 Serial #: 870970 Tax Product#: [] Equip Link: 1130

Tax rental: Y (Y/N) Tax sales (Y/N): Y 6/L typ: [] Mtrl cd: []
 Assigned loc: 0049 Current loc: 0049 Last loc: DMO Yard: []
 Date acquired: 7/23/97 Vendor acqpd: [] P.O. #: 1010
 Date in rental: 7/23/97 Warranty date: [] Last trns date: 12/29/25 Weight: []
 MI/Hr code: (M/H/U) Curr MI/Hr: [] Old MI/Hr: [] Condition: []
 MI/Hr code 2: (M/H/U) Curr MI/Hr 2: [] Old MI/Hr 2: [] Application: []
 Split rent code: N Permanent transfer: [] Off road: Y Key#: []
 Regular Low High Special Cur
 Sell price: [] USD
 Sold amount: [] Disp dt: [] For sale: N Nm lst: []
 Last maint date: [] Comment: PHONE EQUIPMENT Heading 1 |H []
 Date in shop: [] Put in shop by: [] ding 2 |He []
 Last service: [] Service contract: N ding 3 []
 Misc: [] Offsite: []

Reference Glossary

Field Definitions for Tasks

Create Inventory Transfer - Launch

- *Transfer from location* - Enter or accept the code for the location where the items are being transferred from.
- *Transfer to location* - Enter the code for the location where the items are to be transferred.
- *Needed by* - Enter or accept the date and time that the items are needed.
- *Truck number* - If you are transferring truck stock to another truck or location, enter the number of the truck from which you are transferring. If you do not know the number, press F4 to search for it. After entering the truck number, you are advanced to the **Create Inventory Transfer - Equipment Information** screen with all stock from the truck listed. All fields are disabled/protected, and you cannot enter additional items on the transfer.

Create Transfer Equipment Information

- *To location* - Displays the name of the location to which you are transferring items.
- *Ordered by* - Enter the name of the person who requested the transfer.
- *Make transfer permanent* - Indicate whether you want to make the transfer of equipment permanent. If you answer Y, the system creates the necessary general ledger transactions to transfer the ownership to the receiving location. It also updates the *Assigned Location* and *Current Location* fields in the **Equipment Master** for the transferred equipment. In control record **RACETP**, you can specify whether to always make equipment transfers permanent for transfers within a region and for transfers between locations in different regions. If one or both of these control record settings are set to Y, you should use control record **RATRS2** to default this field in *Create Inventory Transfer* to Y and protect it from being modified. If you have special security code **Z76** in your security profile, you can override the **RATRS2** control record settings.
- *Print transfer* - Indicate whether you want to print the transfer.
- *Bar code* - Indicate whether you want to print bar code labels for the transferred items.
- *Equipment Number* - Enter the number for the piece of equipment to be transferred. If you do not know the number, enter 1 in the *Opt* field to the left of this field to access **Equipment Search**.
- *Quantity* - Enter the quantity of the equipment to transfer. For serialized equipment, this amount must be 1.
- *New/Rental* - Indicates if the equipment is new (**N**) or in your rental inventory (**R**).
- *Description* - Displays the description of the equipment.
- *Available* - Displays the quantity available for the equipment.

Suggested Items/Sales and Miscellaneous Items (F9)

- *Item Number* - Enter or accept the number for the sales or miscellaneous item being transferred.
- *Quantity* - Enter or accept the quantity of the item being transferred. If you enter or accept the quantity of a suggested item, and it is not a sales or miscellaneous item, it moves up to the equipment list.
- *Unit of Measure* - Enter or accept the unit of measure for the item being transferred.
- *Description* - Displays a description of the sales or miscellaneous item being transferred.
- *Available* - Displays the quantity available for sales items.

Receive Inventory Transfers

- *From location* - Displays the location that sent the transfer.
- *Signature* - Enter the name of the person who signed for the transfer receipt.
- *Print transfer* - Indicate whether you want to print the transfer.
- *Date sent/time/by* - Displays the date and time that the transfer was sent. The user who entered the transfer is also displayed.
- *Bar code* - Indicate whether you want to print bar code labels for the transferred items.
- *Equipment Number* - Displays the number for the piece of equipment that was transferred.
- *Quantity Sent* - Displays the quantity that was sent on the transfer.
- *Quantity Received* - Enter the quantity that was received on the transfer.
- *Type* - Indicates if the equipment is new (N) or in rental inventory (R).
- *Description* - Displays the description of the equipment.

Sales/Miscellaneous Items

- *Item Number* - Displays the number for the sales or miscellaneous item that was transferred.
- *Sent Quantity* - Displays the quantity that was transferred for each item.
- *Unit of Measure* - Enter or accept the unit of measure for the item being transferred.
- *Quantity Received* - Enter the quantity that was received on the transfer.
- *Description* - Displays a description of the sales or miscellaneous item that was transferred.