Equipment Module – Quick Start Guide – Equipment Transfer Tracking

This QSG details how to utilize the Equipment Transfer Tracking functionality to view equipment transfer history and return items to the sending warehouse. This functionality is accessible to the Warehouse Manager role.

1) Accessing the Equipment Transfer Tracking Functionality

Select the "Equipment Transfer Tracking" link from the "Transfers" tab

Figure 1 - Transfer Tracking Menu

2) Searching the transfer history

The Transfer Tracking allows you to search the transfer history from 3 different perspectives: equipment currently at a warehouse, equipment transferred to a specific warehouse, and equipment transferred from a specific warehouse. After choosing an option in the "Direction" drop-down list, you will then select the warehouse within to search. Optionally, you can further narrow down your results using one of the following filters:

- Transferred Between - select a date range (or same date for both to search a specific date) to search for equipment transferred within a specific time frame
- Barcode – Type in a barcode to search for a specific piece of equipment transferred
- Current Status – select a status option to search for equipment with this specific equipment status

Figure 2 - Search Filters

After configuring the search, click the "Search" button. The Results table will update with transferred equipment matching your criteria. Only the very latest transfer action will be visible; click the "More" link in the "Transfer History" column to display all the transfer actions on this equipment.

Figure 3 - Transfer Tracking Search Results

From the results, you can click on the Barcode to go to the Equipment Information page for this equipment, export the results in CSV, Excel, or PDF format, or you can directly send the equipment back to the sending warehouse or on to another warehouse.

3) Transferring Equipment

In order to either return equipment or transfer to another warehouse, the equipment must be 1) In a warehouse for which you are the warehouse manager and 2) Have an equipment status of "Available", "Available in Kit", or "Checked In".

Return to Sender

Click the box to the left of the barcode and then click the "Return to Last Sender" button above the results table. The Transfer Confirmation screen appears and shows the equipment will go to the warehouse listed in the "Last Sender" column on the previous page. For each piece of equipment you are returning, check the box to the left of the barcode, select a responsible person from the drop-down list, and then click the "Transfer" button when all equipment has been configured.
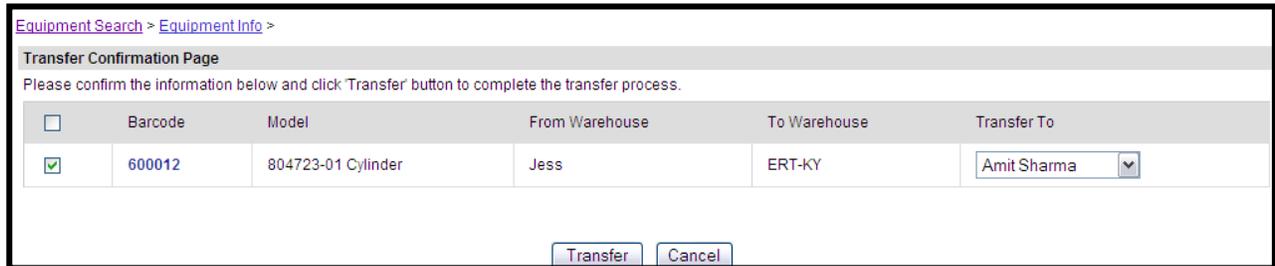

Figure 4 - Transfer Confirmation

The equipment will immediately be transferred and appear in the receiving warehouse's "Receive Transfer" list. No transfer cart is needed for a return to sender transfer.

Transfer to Other Warehouse

Click the box to the left of the barcode for which you want to send to another warehouse. Then select a warehouse and responsible person using the drop-down lists directly above the Results table. Click the "Transfer" button.

The Transfer Confirmation screen appears and shows the equipment will go to the warehouse selected on the previous page. For each piece of equipment you are transferring, check the box to the left of the barcode and then click the "Transfer" button when all equipment has been confirmed.

Equipment Search > Equipment Info >

Transfer Confirmation Page

Please confirm the information below and click 'Transfer' button to complete the transfer process.

	Barcode	Model	From Warehouse	To Warehouse	Transfer To
☑	600012	804723-01 Cylinder	Jess	ERT-KY	Amit Sharma

Transfer   Cancel

Figure 5 - Transfer Confirmation

The equipment will immediately be transferred and appear in the receiving warehouse's "Receive Transfer" list. No transfer cart is needed for a return to sender transfer.