



Title:	NetSuite Inventory Transfer Process	Doc #	XXX-XXXXXX
Doc Type:	Procedure	Revision	A

Template 910-000002 Rev. C

Process Owner (Job Title)	Stakeholders (Job Titles)
John Smith (Process Manager)	Jill Stone (Program Manager)
	Karen Appleton (Process Coordinator)
	Michael Bowdoin (Inventory Manager)

Revisions		
Rev	Description	DCO
A	Initial Draft	122916

Associations	
Doc #	Title



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1. Policy

Inventory must be accurate in real-time.

2. Purpose

The purpose of this document is to describe the procedure for transferring inventory in NetSuite.

3. Responsibilities

Job Title, Group or Dept.	Responsibilities
Inventory Manager	Owner of this process.
Process Coordinator	Provides guidance on this process.
Program Manager	Facilitates changes to NetSuite software or this process.

4. Definitions and Acronyms

Term	Definition
OPP	Opportunity
POC	Point of Contact
QTY	Quantity

5. Procedure

5.1. NetSuite Roll 'Wing Group Inventory Control'

The following procedure is to transfer inventory in NetSuite:

1. Access the **Inventory Transfer** screen by clicking **Transactions > Inventory > Transfer Inventory**.

2. In the **SUBSIDIARY** list, select **Wing Group, LLC**.
3. In the **FROM LOCATION** list, select the location that you are moving from.
4. In the **TO LOCATION** list, select the location that you are moving to.

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- In the **MEMO** box, enter a note.
NOTE: This is not mandatory, but good for auditing transaction.
- In the **DEPARTMENT** list, select **0000**.
- Click the **Items** menu.

- In the **ITEM** box, enter the item(s) to be moved.
- In the **QTY. TO TRANSFER** box, enter the quantity to be moved.
- Click the **INVENTORY DETAIL** icon to open the **Inventory Detail** screen.

- In the **SERIAL/LOT NUMBER** list, type or select the serial number.
NOTE: The **BIN** box should default to the BIN where the serial number is located.
- Click the **Add** button.
- Click the **OK** button. The **Inventory Transfer** screen displays again.



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14. Click the **Save** button.

The screenshot shows a confirmation message at the top: "Confirmation Transaction successfully Saved". Below this is the "Inventory Transfer" form for transaction 91. The form includes a "Primary Information" section with fields for DATE (11/4/2015), FROM LOCATION (POC Inventory), REF. NO. (91), TO LOCATION (Warehouse), and MEMO (POC Move from OPP ID 128435 Printemps to OPP ID 179809 Babou). A "Classification" section shows SUBSIDIARY, DEPARTMENT (0000), TRANSACTION NUMBER (91), and EXTERNALID. At the bottom, there is an "Items" table with columns for ITEM, DESCRIPTION, UNITS, QTY. ON HAND, QTY. TO TRANSFER, and INVENTORY DETAIL. One item is listed: OS-C-C240M4-6, Cisco C240M4 20x1.2TB HDD, 4x400GB SSD, 2x8-10 core CPU, with units EA and a quantity to transfer of 2.

15. Note the confirmation number.

16. Click the **Add** button if there are additional items to add.

17. Click the **Save** button to complete the transaction.

The screenshot shows a confirmation message at the top: "Confirmation Transaction successfully Saved". Below this is the "Inventory Adjustment" form for transaction 84. The form includes a "Primary Information" section with fields for REFERENCE # (84), ESTIMATED TOTAL VALUE (2,479.18), SUBSIDIARY, DATE (6/30/2015), ADJUSTMENT ACCOUNT (50030 Product COGS - Parts), and MEMO (SO 2235 SVT-MA-FG to Flash Israel). A "Classification" section shows DEPARTMENT (0000) and ADJUSTMENT LOCATION (Support Inventory). At the bottom, there is an "Adjustments" table with columns for QTY. and ADJUST.

6. Training

N/A

7. Metrics

N/A



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8. Record Retention

N/A