Inventory Transfers

Inventory Transfers

Purpose and when to use this record

Move stock between warehouses while preserving the source, destination, item quantities, and transfer status.

At a glance

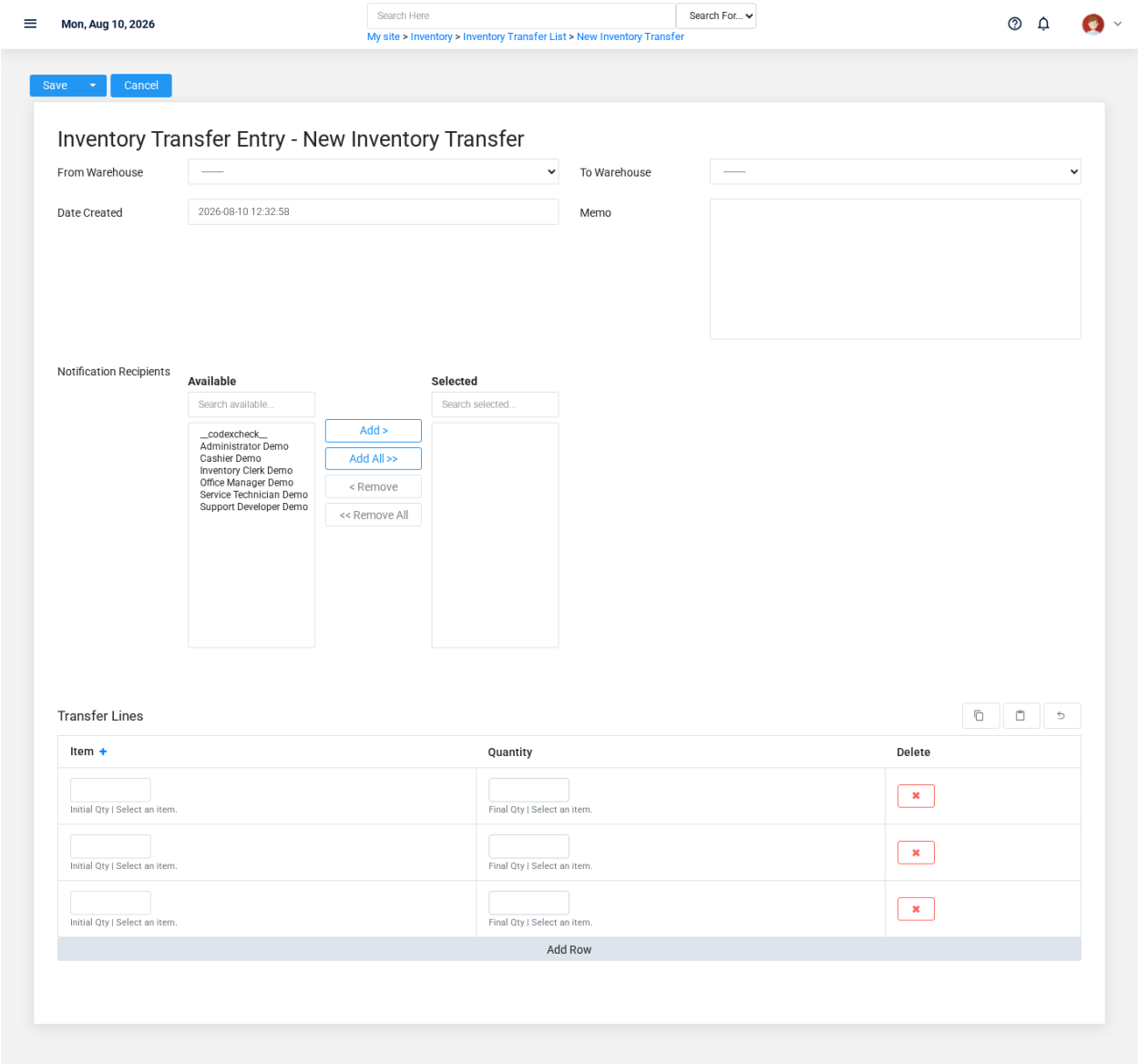
- **Identify it by: Status**, and **Date Created**.
- **Check its business context: From Warehouse**, **To Warehouse**, **From Adjustment**, and **To Adjustment**.
- **Why care:** Warehouse, item, unit, quantity, and cost must describe the same physical movement. A wrong warehouse or unit can make availability and valuation misleading.
- **Why care:** Treat posted, processed, paid, reversed, and edit-locked states as controls—not ordinary descriptive fields. Confirm the source transaction before changing any state that the screen permits you to change.
- **Why care:** Status communicates workflow progress to other staff. Change it only when the underlying work, approval, payment, or handoff has actually occurred.

Before you begin

You need the Brisk permission for the action you are taking on inventory transfers. If a Create, Edit, or Delete control is absent, do not work around it with another user’s account; ask an administrator to review your role.

Have valid **From Warehouse**, and **To Warehouse** records ready first. Those selections determine where this Inventory Transfer belongs and which later screens can find it.

Create an Inventory Transfer



The Inventory Transfers create screen in the Brisk documentation demo.

Create an Inventory Transfer only after confirming that the source document or operational event has not already been entered.

1. Select the business context first: **From Warehouse**, **To Warehouse**, **From Adjustment** , and **To Adjustment**.
2. Enter the required identifying and operational values: **From Warehouse**, and **To Warehouse**.
3. Review **Status**, **Processed**, and **Edit Locked** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Inventory Transfer, then confirm **Status**, and **Date Created** on its detail page before continuing.

After saving: Confirm the source decreased and the destination increased for the same item quantities before considering the movement complete.

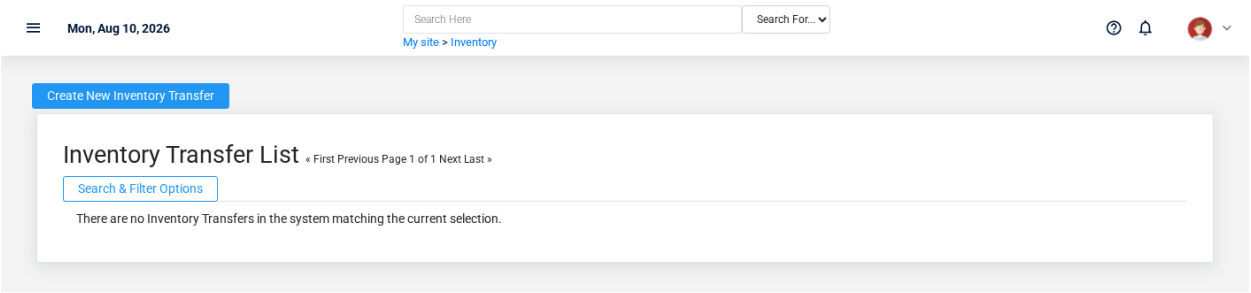
Review Inventory Transfer details

Use the detail page as the shared record of what this Inventory Transfer currently means. Verify **Status**, **Date Created**, **Processed**, and **Edit Locked** before relying on it for a decision.

Follow **From Warehouse**, **To Warehouse**, **From Adjustment**, and **To Adjustment** to determine whether the issue is on this Inventory Transfer or on one of those linked records.

Next check: Confirm the source decreased and the destination increased for the same item quantities before considering the movement complete.

Find and review inventory transfers



The Inventory Transfers list screen in the Brisk documentation demo.

Use the Inventory Transfers list to find the correct record before opening or changing it. Compare **Status**, and **Date Created**. Records with similar names or numbers can still belong to different **From Warehouse**, **To Warehouse**, **From Adjustment**, and **To Adjustment**.

- The initial order emphasizes **Id**. Select a column heading when you need a different comparison.

Open the Inventory Transfer whose **Status**, and **Date Created** match the task. If it is missing, clear the list filters and recheck **Status**, **Processed**, and **Edit Locked** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 9 user-relevant fields for this Inventory Transfer, including 4 linked-record selections and 1 controlled-choice field. Create and edit screens may hide calculated or workflow-managed values from this full reference.

Field	Required	What it controls

Status	No	Indicates whether this transfer has been processed. Available values: Draft, Complete.
From Warehouse	Yes	The from warehouse associated with this inventory transfer.
To Warehouse	Yes	The to warehouse associated with this inventory transfer.
Date Created	No	Date and time recorded for date created on this inventory transfer.
Memo	No	The memo recorded for this inventory transfer.
From Adjustment	No	The from adjustment associated with this inventory transfer.
To Adjustment	No	The to adjustment associated with this inventory transfer.
Processed	No	Whether the processed option applies to this inventory transfer.
Edit Locked	No	Whether the edit locked option applies to this inventory transfer.

What happens next

Confirm the source decreased and the destination increased for the same item quantities before considering the movement complete.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **From Warehouse**, and **To Warehouse** and any message beside the field. A required related record may also be inactive or unavailable to your role.
- **The record saved but is not available where expected:** Recheck **Status**, **Processed**, and **Edit Locked**, then clear the filters on the destination list. A saved record can still be inactive, unpublished, locked, unapproved, or in the wrong workflow state.
- **The values look right but the result is wrong:** Open **From Warehouse**, **To Warehouse**, **From Adjustment**, and **To Adjustment** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.

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