

BYU Dining Services

Standard Operating Procedures

BP0018: Transfers

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SOP Collection: [Eatec SOPs](#)
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SOP Owner: Doug Walker
Accountable Group: Dining Accounting
Collaborative Business Process

Purpose

The purpose of this SOP is to facilitate the accurate and efficient transfer of inventory items between locations within Dining Services using the Eatec Ordering System. Generally, transfers are the fulfillment of requisitions.

Responsibilities

Area Responsibilities	Centralized Responsibilities
<p>Receiving Users - Responsibilities include:</p> <ul style="list-style-type: none">• Receiving transferred inventory items or finished goods.• May initiate a transfer via requisition in Eatec or through verbal agreement.• Must maintain a paper trail with signatures from designated individuals as proof of physical delivery. <p>Distributing Users – Responsibilities include:</p> <ul style="list-style-type: none">• Initiating transfers and ensuring accurate documentation.• Collaborates with the receiving entity to facilitate smooth transfers.	<p><u>Dining Accounting</u> Dining Systems Coordinator (Doug Walker)- Responsibilities include</p> <ul style="list-style-type: none">• Resolve accounting errors related to transfers.• Provide training, answer questions, and resolve differences relating to this SOP.

SOP User Guide

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Definitions

Transfers: Virtual movement of inventory items between locations.

From Location: Where the item or finished good is being sent.

To Location: Location of receiving the item or finished goods.

Inventory Item: An inventory item encompasses anything that is part of your organization’s stock and can be moved or utilized within your inventory management system. These items can include raw materials, components, or finished products.

Finished Goods: Finished goods specifically pertain to inventory items that have completed the production process and are ready for sale or use. Finished goods should be produced within Eatec (see Production SOP) before they are transferred to ensure accurate inventories and costing. Finished goods can also be designated as Produce on Transfer.

In your context, examples of finished goods could be products like “CougarTails” produced on campus by the Culinary Support Center.

Produce on Transfer: Produce on transfer is the designation that when some Finished Goods are transferred, Eatec first produces them automatically without needing to go through the production module. To see how to set up a Finished Good as Produce on Transfer, see the Inventory Items SOP.

Creating a Transfer without a Requisition

Most transfers are initiated through a requisition within Eatec. However, sometimes transfers are completed without a requisition because a requesting location reaches out directly supply location due to time restraints. Transfers can still be processed without a requisition. For creating transfers without requisition in Eatec, the “From Location” is the location that processes the transfer in Eatec. This is because the processing of the transfer will deplete the ‘From’ Location’s inventory and we want that area to control the movement of their inventory. Additionally, this becomes especially important as

certain areas produce items upon transfer and may have lot tracking information that needs to be catalogued by the supply location ('From Location') before the transfer is processed in Eatec.

Steps:

1. Coordinate with Appropriate Entities:
 - Ensure that the need for the transfer has been approved by the appropriate personnel.
2. Navigate to Inventory Management:
 - On the left-hand side of the screen, locate and click on the "Inventory Management" tab.
3. Select Transfer Option:
 - From the drop-down menu under "Inventory Management," select "Transfers."
4. Initiate New Transfer:
 - In the top-right corner of the screen, click on the blue "New Transfer" button.
5. Specify Transfer Details:
 - A new page titled "Details" will appear.
 - Click on the small arrow next to the "From Location" tab.
 - Select the appropriate area from which inventory items are being transferred.
 - Confirm the selection by clicking until the "From Location" field is filled with the correct area.
 - Choose a Post Date by clicking on the calendar icon next to the Post Date field. This date signifies when the items are expected to be transferred. This date cannot be in the future
6. Select Destination Location:
 - Click on the small arrow next to the "To Location" tab.
 - Choose the location within Dining Services that will receive the transferred items.
7. Add Items to Transfer List:
 - Click the small blue arrow next to the "Item List" in the top-right corner under the "Print and Transfer" button.
 - A new page will appear with two search bars:
 - Use the top-right search bar next to the "Inventory Items" tab to search and add inventory items to the transfer list.
 - Use the search field or packages to search keywords in the items or finished goods you desire to transfer.
 - A list will appear from which you can select the appropriate items to transfer.
 - Click the box next to the items you desire to transfer. A blue "Select" box will appear on the bottom right of the screen. Click the blue "Select" button to add the selected items to the list.
 - If the items are finished goods, another box will appear summarizing the selected items with a blue "Add" button on the bottom right corner. Click the blue "Add" button, and the selected items will be added to your list.
 - Once the Item list has populated, click on the amount you would like to transfer under the "Quantity" tab.
 - If the item being transferred is lot tracked, on the line item there will be an option to choose a lot to transfer. Select the appropriate lot to transfer.


- i. If more than one lot of a single item is transferred, each lot requires a new line in the item list. Please add another line for each lot.
 - Double-check to ensure the desired transfer unit has been selected. Verify quantities and prices in the "Estimated Total" list to ensure accuracy.
 - Enter any pertinent remarks related to the transfer or items being transferred in the "Remarks" section of the Item List.
 - If the item has a value of zero, the transfer will not be able to take place.
8. Complete Transfer:
- Ensure all required fields are filled out correctly.
 - Review the transfer list to confirm accuracy and completeness.
 - Once satisfied, proceed by clicking the "Print and Transfer" or "Transfer" buttons to finalize the transfer within the Eatec system.
9. A prompt with "Transfer Print" Will appear, allowing you to select from a list of documents to print out for your records.


Creating a Transfer from a Requisition in Eatec


Most transfers are processes using a requisition. To learn when and how to create a requisition, see the Requisition SOP. For creating transfers from a requisition in Eatec, the "From Location" is the location that processes the transfer in Eatec. This is because the processing of the transfer will deplete the From Location's inventory and we want that area to control the movement of their inventory. Additionally, this becomes especially important as certain areas produce items upon transfer and may have lot tracking information that needs to be catalogued by the supply location ('From Location') before the transfer is processed in Eatec.

1. Access Inventory Management:
 - From the Eatec home screen, click on the "Inventory Management" tab under the Dashboard section on the left side.
 - Select "Transfers" from the dropdown menu.
2. Open Requisitions:
 - In the top left corner of the Transfers screen, locate the blue "Open Requisition" field with a dropdown arrow.
 - Choose "Open Requisition" from the available options.
 - All open requisitions will appear.
3. Search or Sort:
 - To find a specific requisition, use the "Search by Requisition #" field on the left side of the screen.
 - Alternatively, sort requisitions by criteria such as Requisition #, Request Location, or Supply Location.
4. Select Requisition:
 - Identify the appropriate requisition and double-click on it.
 - You'll be taken to the "New Transfer" screen.
5. Review Details:
 - Confirm that quantities, pricing, items, and locations are correct.
6. Choose Action:

- Click the blue “Print and Transfer” button at the top right of the screen for proof of paperwork.
 - Alternatively, click the blue “Transfer” button to transfer the inventory item or finished good directly.
7. Print Transfer (Optional):
- If you selected “Print and Transfer,” a “Transfer Print” box will appear. Choose your desired format for printing.

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