

Inventory Ownership Transfer

Move on-hand inventory from one client to another while preserving location, history, and audit trail.

Client-to-client inventory transfer

Transfer-only receipt

Audit-safe

In one sentence

This feature lets an administrator transfer ownership of selected on-hand inventory from Client A to Client B without physically moving the product in the warehouse.

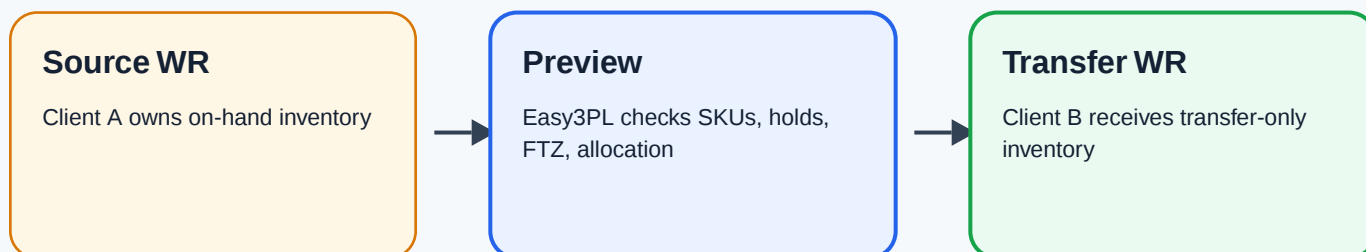
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OVERVIEW

What the feature is called and why it exists

Feature name: Inventory Ownership Transfer

In WMS language, this is a client-to-client inventory ownership transfer. It is used when product already exists in the warehouse but the commercial owner changes from one client account to another.



Physical product stays in place unless warehouse staff move it separately.

The key idea

The product can stay exactly where it is. Easy3PL creates a new non-billable transfer receipt for the destination client and moves the selected on-hand inventory to that client record.

- Best for client sale/transfer situations where both clients share the same SKU catalog.
- Keeps the original receipt as the historical receiving record.
- Creates a destination transfer receipt that becomes the operational inventory source for picking and shipping.

WHAT HAPPENS

What Easy3PL changes when you confirm

System Area	Result
Destination receipt	A new non-billable transfer receipt is created for the destination client.
Destination inventory	New on-hand rows are created using the destination client matching SKU records.
Physical storage unit	The storage-unit number and current location assignment are copied to the transfer receipt.
Source inventory	Selected source rows are set to zero on hand and retired from availability.
Audit trail	Receipt, inventory, and movement history record the transfer details.

Operational rule

After the transfer, use the new transfer receipt and destination-client inventory for picking and shipping. The source receipt remains the original receiving and audit record.

BEFORE YOU START

Checklist for a clean transfer

1

Confirm the destination client

The destination client must already exist and must be different from the source client.

2

Create or confirm matching SKUs

Every SKU you transfer must exist as an active item/SKU for the destination client.

3

Check that the inventory is available

Inventory that is already allocated to regular orders or eOrders is blocked.

4

Transfer whole storage units

If a physical pallet/storage unit has multiple on-hand rows, select all of its on-hand rows together.

5

Avoid restricted workflows

FTZ-controlled receipts and master-case hierarchy rows are intentionally blocked in this first version.

Why the restrictions exist

The transfer changes the legal/commercial owner of inventory. Easy3PL is strict so it does not accidentally split one physical pallet between two clients, break an active pick, or bypass FTZ/master-case controls.

HOW TO USE IT

Receipt screen walkthrough

Receipts > More > Inventory Ownership Transfer

Source Receipt
WR #10202 | Client A | Unico

Destination Client
Client B must have matching active SKUs

Select	Storage Unit	SKU	Qty	Destination Match	Status
[x]	Standard Pallet #4	SKU-RED-24	48	SKU-RED-24	Ready
[]	Standard Pallet #5	SKU-BLUE-12	18	-	Missing SKU

1

Open Receipts and select one receipt

The More menu action is enabled only when exactly one source receipt is selected.

2

Open More > Inventory Ownership Transfer

The modal opens with source receipt details and a destination client selector.

3

Choose the destination client

Easy3PL previews the source inventory and checks destination SKU matches.

4

Review row status

Ready rows can transfer. Rows with issues show the reason, such as missing SKU, allocation, FTZ, or master-case block.

5

Select rows and confirm

Select individual rows or click Select Eligible, add an optional note, then click Confirm Transfer.

SAFEGUARDS

What can block a transfer

Block Reason	What To Do
Missing destination SKU	Create the SKU under the destination client, then run the preview again.
Allocated inventory	Unallocate, ship, cancel, or otherwise finish the active order/eOrder workflow first.
No on-hand quantity	The source row has already been depleted and cannot be transferred.
FTZ receipt	Use an FTZ-specific process because customs accountability is involved.
Master-case row	Handle separately until case-level transfer support is added.
Partial storage unit	Select every on-hand row on that physical storage unit.

AFTER THE TRANSFER

What staff should do next

- Use the new transfer receipt number for destination-client inventory research.
- Pick and ship from the destination client inventory rows created by the transfer.
- Print or reference labels for the new transfer receipt when working the inventory under the destination client.
- Keep the source receipt for receiving history, vendor/PO traceability, and audit review.
- Use the optional note for sale references, approvals, or internal tickets.

Barcode guidance

The transfer receipt is the new operational record for Client B. Location scans still represent the physical warehouse location. Source receipt labels are audit/history references; destination-client work should reference the new transfer receipt/inventory.

AUDIT TRAIL

What the system records

Inventory Ownership Transfer is designed to avoid silent data changes. The system records the source receipt, transfer receipt, source inventory row, destination inventory row, quantities, clients, user, and notes.

Audit Record	Purpose
Source receipt history	Shows inventory ownership left the original receipt.
Transfer receipt history	Shows the destination receipt was created by transfer.
Source inventory history	Shows the source row was transferred and retired to zero on hand.
Destination inventory history	Shows the destination row was created from the source inventory.
Movement events	Preserve structured source/target receipt, inventory, pallet, location, quantity, and user metadata.

QUICK STAFF SCRIPT

Plain-English explanation

What to say

Inventory Ownership Transfer moves product ownership from one Easy3PL client to another. It does not receive new goods and it does not physically move the product. It creates a new transfer receipt for the destination client, moves selected on-hand inventory to matching destination SKUs, and leaves a complete audit trail.

TROUBLESHOOTING

Common questions

- If the destination SKU does not match, create the destination SKU first and reopen the preview.
- If the row says allocated, clear the active allocation before attempting ownership transfer.
- If only some rows on a pallet are selected, select all on-hand rows on that storage unit.
- If the transfer completed and the source client no longer shows stock, that is expected. Search the new transfer receipt under the destination client.
- If staff need to pick or ship the stock for Client B, use the destination client and the new transfer receipt/inventory records.