

INVENTORY

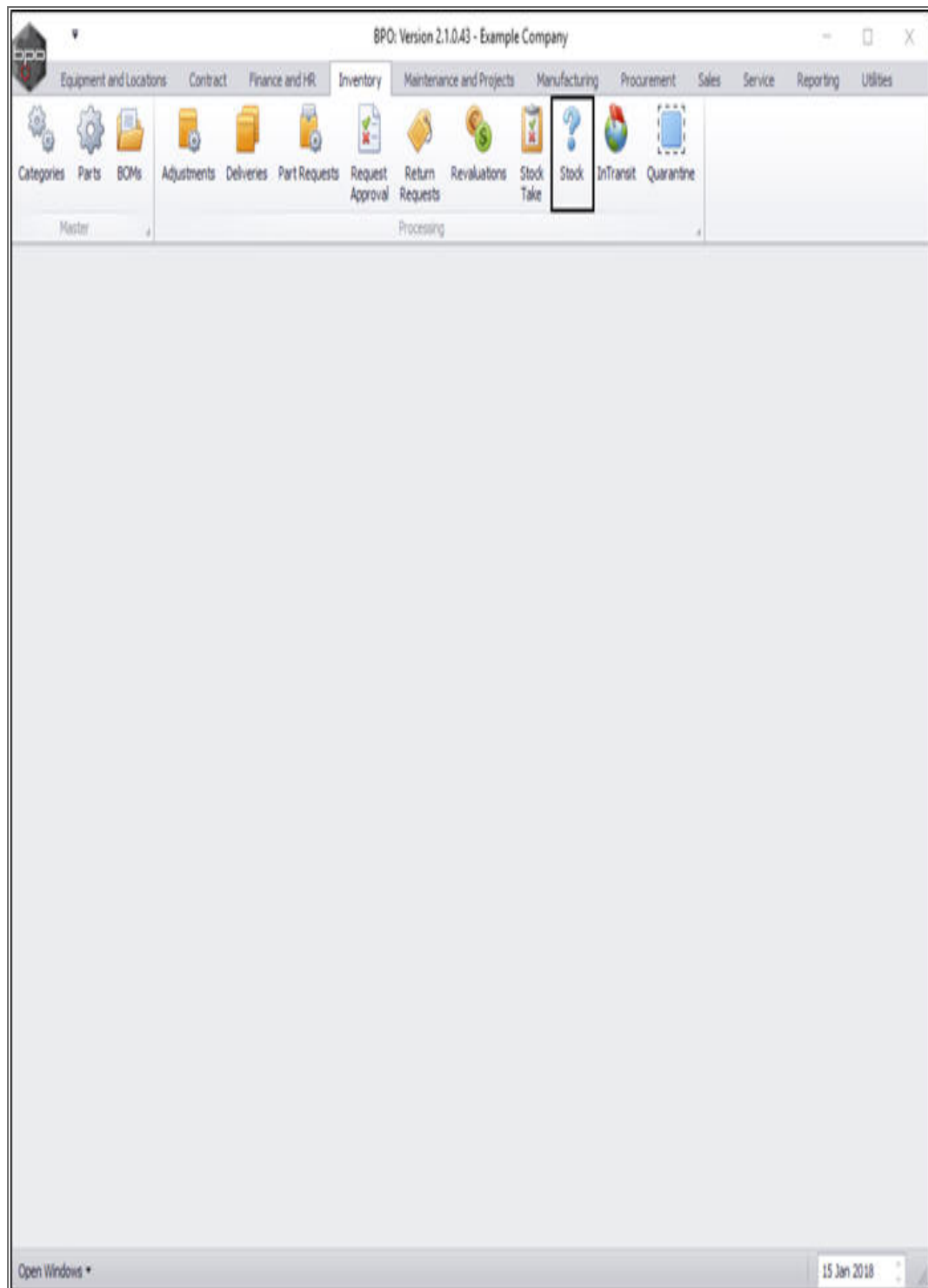
STOCK – STOCK TRANSFER

This option is used by company's who have various sites set up, and will often move goods from one site to an '**in-transit**' location, on the way to another site. Stock in this location cannot be issued until it is received into the **destination** warehouse. Two stock transfer transactions occur during this process:

- i. Transfer from **origin** warehouse to the **in transit** location
- ii. Transfer from the **in transit** location to the **destination** warehouse.

Warehouse Configuration is required if you are going to use the In-Transit configuration - you will need to ensure that the Company Configuration Enforce In-transit flag is set to 'Yes' to be able to complete this process.

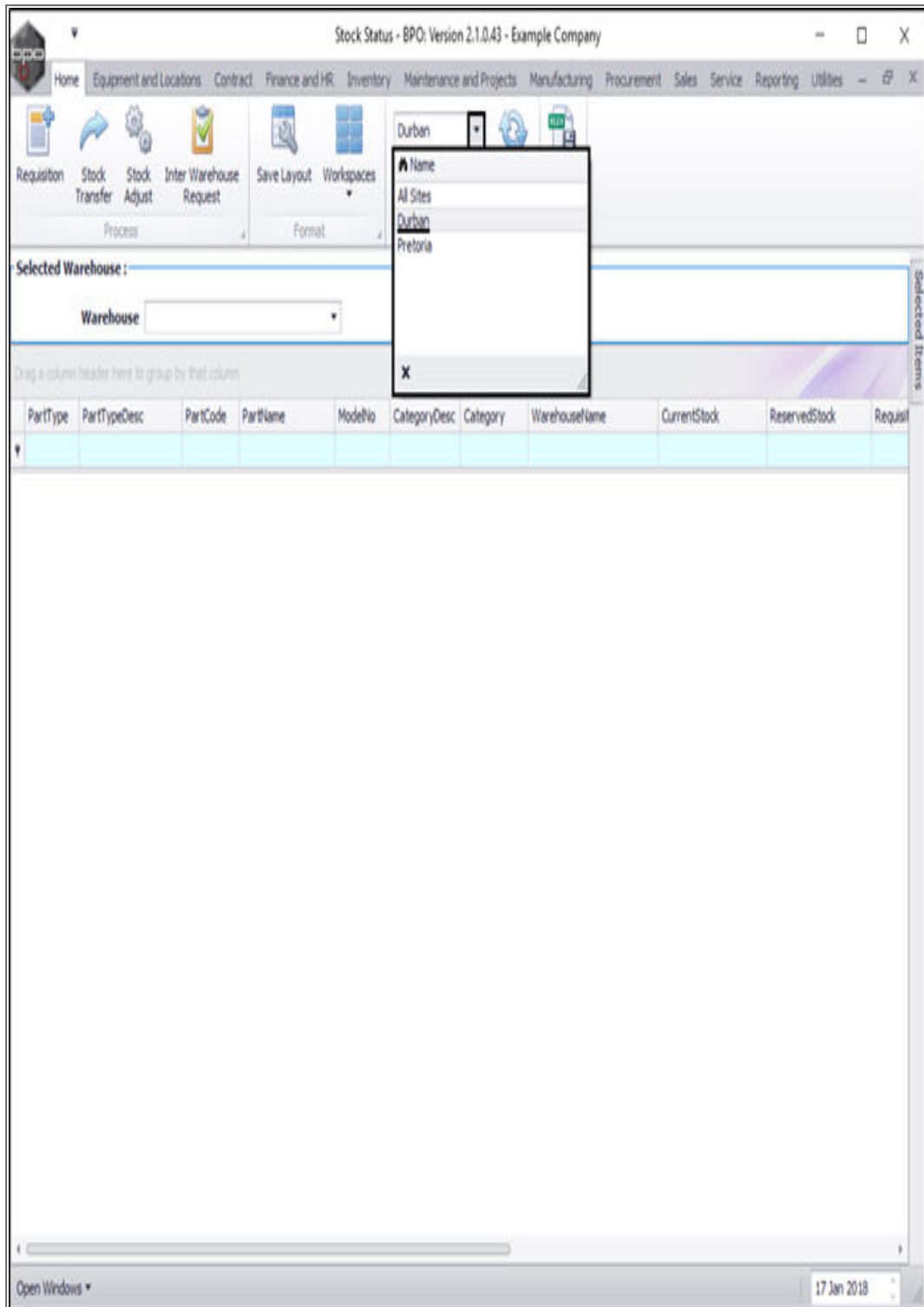
Ribbon Access: *Inventory > Stock*



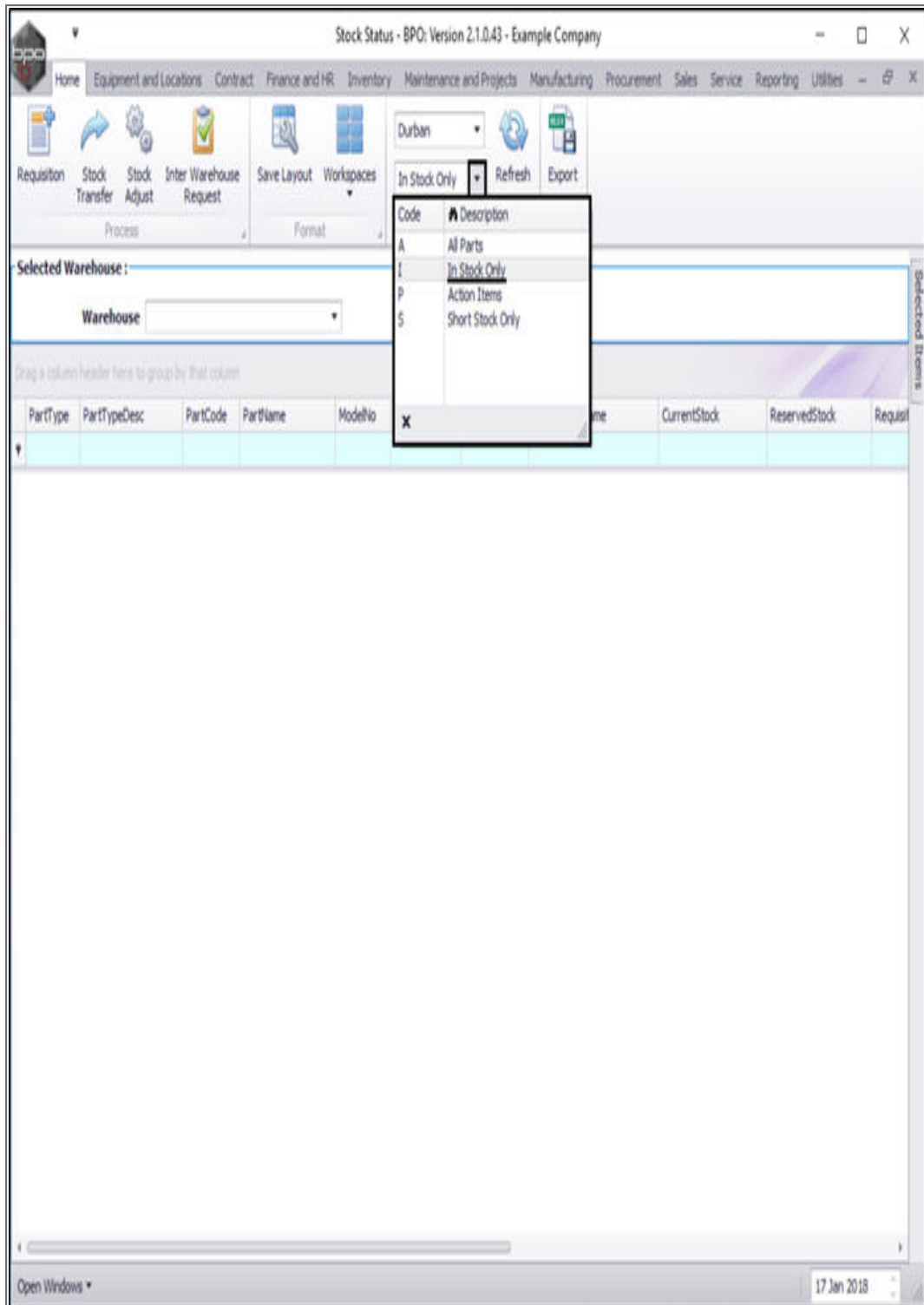
The ***Stock Status*** screen will be displayed.

Select the Site and Status

- Select the **site**.
- In this image **Durban** has been selected.




- Select the **status**.
 - In this image **In Stock Only** has been selected.



SELECTED ITEMS PANEL

- Click on the ***Selected Items*** tab.



Home

Equipment and Locations

Contract

Finance and HR

Inventory

Maintenance and Projects

Manufacturing

Procurement

Sales

Service

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Utilities

Requisition

Stock Transfer

Stock Adjust

Inter Warehouse Request

Save Layout

Workspaces

Durban

In Stock Only

Refresh

Export

Process

Format

Current

Print

Selected Warehouse :

Warehouse

Drag a column header here to group by that column

PartType	PartTypeDesc	PartCode	PartName	ModelNo	CategoryDesc	Category	WarehouseName	CurrentStock	ReservedStock	Request

Open Windows

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- The ***Selected Items*** panel will be ***expanded***.
 - ***Dock*** this panel to make the ***Stock Status*** screen easier to work in.

Note: You will see that this ***Selected Items*** panel contains exactly the same column details as the ***Selected Warehouse*** panel.

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SELECT WAREHOUSE

- Click on the *drop-down arrow* in the **Warehouse** field to display the **Warehouse Name menu**.
- Click on the selected **Warehouse Name**.
 - In this image **Main Warehouse** has been selected.

Stock Status - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Requisition Stock Transfer Stock Adjust Inter Warehouse Request Save Layout Workspaces Durban In Stock Only Refresh Export

Process Format Current Print

Selected Warehouse:

Warehouse

Drag a column header here to group by that column

PartType PartTypeDesc ModelNo CategoryDesc

Selected Items

Drag a column header here to group by that column

PartType PartTypeDesc PartCode PartName ModelNo CategoryDesc Categ

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- The left hand ***Selected Warehouse*** panel will now populate with a list of all the stock items in that warehouse.

SELECT ITEMS FOR TRANSFER

- ***Click*** and ***hold*** on the ***stock item*** that you wish to ***transfer***.
- ***Drag*** and ***drop*** the selected item into the right hand ***Selected Items*** panel.

Stock Status - BPO: Version 2.1.0.43 - Example Company

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Requisition Stock Transfer Stock Adjust Inter Warehouse Request Save Layout Workspaces Durban In Stock Only Refresh Export

Process Format Current Print

Selected Warehouse:

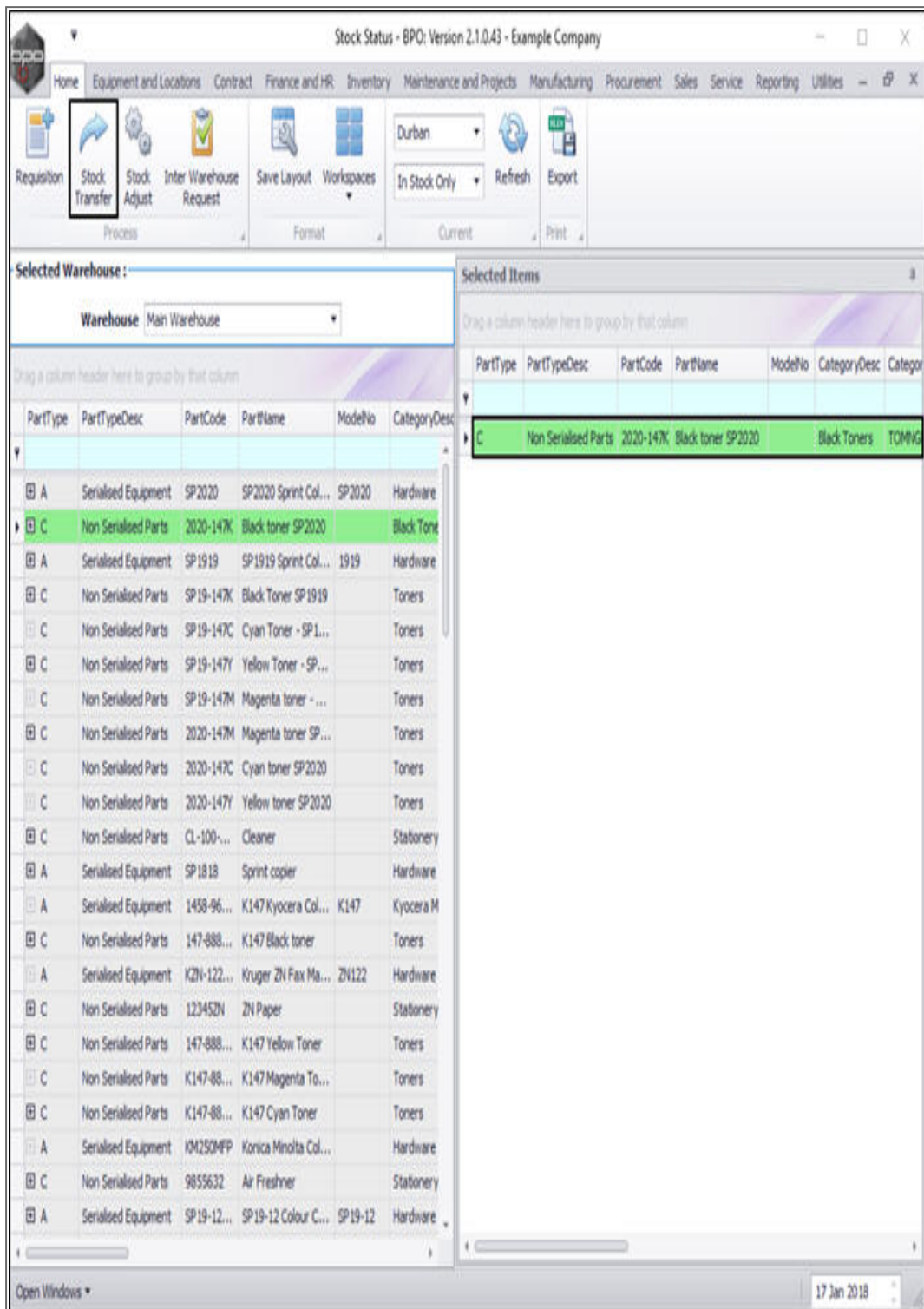
Warehouse Main Warehouse

Drag a column header here to group by that column

PartType	PartTypeDesc	PartCode	PartName	ModelNo	CategoryDesc	Category
A	Serialised Equipment	SP2020	SP2020 Sprint Col...	SP2020	Hardware	
C	Non Serialised Parts	2020-147K	Black toner SP2020		Black Toner	
A	Serialised Equipment	SP1919	SP1919 Sprint Col...	1919	Hardware	
C	Non Serialised Parts	SP19-147K	Black Toner SP1919		Toners	
C	Non Serialised Parts	SP19-147C	Cyan Toner - SP1...		Toners	
C	Non Serialised Parts	SP19-147Y	Yellow Toner - SP...		Toners	
C	Non Serialised Parts	SP19-147M	Magenta toner - ...		Toners	
C	Non Serialised Parts	2020-147M	Magenta toner SP...		Toners	
C	Non Serialised Parts	2020-147C	Cyan toner SP2020		Toners	
C	Non Serialised Parts	2020-147Y	Yellow toner SP2020		Toners	
C	Non Serialised Parts	CL-100-...	Cleaner		Stationery	
A	Serialised Equipment	SP1818	Sprint copier		Hardware	
A	Serialised Equipment	1458-96...	K147 Kyocera Col...	K147	Kyocera M	
C	Non Serialised Parts	147-888...	K147 Black toner		Toners	
A	Serialised Equipment	K2H-122...	Kruger ZH Fax Ma...	ZH122	Hardware	
C	Non Serialised Parts	12345ZH	ZH Paper		Stationery	
C	Non Serialised Parts	147-888...	K147 Yellow Toner		Toners	
C	Non Serialised Parts	K147-88...	K147 Magenta To...		Toners	
C	Non Serialised Parts	K147-88...	K147 Cyan Toner		Toners	
A	Serialised Equipment	KM250MFP	Konica Minolta Col...		Hardware	
C	Non Serialised Parts	9855632	Air Freshner		Stationery	
A	Serialised Equipment	SP19-12...	SP19-12 Colour C...	SP19-12	Hardware	

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- The **Selected Items** panel will now contain the item details.
- Click on **Stock Transfer**.



Stock Status - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Requisition Stock Transfer Stock Adjust Inter Warehouse Request Save Layout Workspaces In Stock Only Refresh Export

Process Format Current Print

Selected Warehouse: Warehouse Main Warehouse

Drag a column header here to group by that column

PartType	PartTypeDesc	PartCode	PartName	ModelNo	CategoryDesc	Category
A	Serialised Equipment	SP2020	SP2020 Sprint Col...	SP2020	Hardware	
C	Non Serialised Parts	2020-147K	Black toner SP2020		Black Toners	TCMVU
A	Serialised Equipment	SP1919	SP1919 Sprint Col...	1919	Hardware	
C	Non Serialised Parts	SP19-147K	Black Toner SP1919		Toners	
C	Non Serialised Parts	SP19-147C	Cyan Toner - SP1...		Toners	
C	Non Serialised Parts	SP19-147Y	Yellow Toner - SP...		Toners	
C	Non Serialised Parts	SP19-147M	Magenta toner - ...		Toners	
C	Non Serialised Parts	2020-147M	Magenta toner SP...		Toners	
C	Non Serialised Parts	2020-147C	Cyan toner SP2020		Toners	
C	Non Serialised Parts	2020-147Y	Yellow toner SP2020		Toners	
C	Non Serialised Parts	CL-100-...	Cleaner		Stationery	
A	Serialised Equipment	SP1818	Sprint copier		Hardware	
A	Serialised Equipment	1458-96...	K147 Kyocera Col...	K147	Kyocera M	
C	Non Serialised Parts	147-888...	K147 Black toner		Toners	
A	Serialised Equipment	K2N-122...	Kruger ZN Fax Ma...	ZN122	Hardware	
C	Non Serialised Parts	12345ZN	ZN Paper		Stationery	
C	Non Serialised Parts	147-888...	K147 Yellow Toner		Toners	
C	Non Serialised Parts	K147-88...	K147 Magenta To...		Toners	
C	Non Serialised Parts	K147-88...	K147 Cyan Toner		Toners	
A	Serialised Equipment	KM250MFP	Konica Minolta Col...		Hardware	
C	Non Serialised Parts	9855632	Air Freshner		Stationery	
A	Serialised Equipment	SP19-12...	SP19-12 Colour C...	SP19-12	Hardware	

Open Windows 17 Jan 2018

- The **Stock Transfer** screen will be displayed.
 - **Reference Type:** Click on the drop-down arrow and select the reference type.
 - **Reference:** Type in a reference relevant to this stock transfer.
 - **Final Warehouse:** Click on the search icon and select an a final destination warehouse for this stock transfer.
 - **Requestor:** This will auto populate with the person currently logged on to the system but you can click on the drop-down arrow and select an alternative person responsible for the stock transfer if required.
 - **Transfer Date:** This will auto populate with the current date but you can click on the drop-down arrow and use the calendar function to select the date. Either type in or use the directional arrows to select the time.
- **Comments:** Type a relevant comment regarding this stock transfer in this text box if required.

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PARTS DATA GRID

- You will see that the details of the item(s) selected in the previous **Stock Status** screen have auto populated in this frame.
- Click in the **Batch Number** text box.

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SELECT BATCH/SERIAL NO.

- An *ellipsis* button will be revealed.
- Click on this button to display the *Select a batch/serial no. for this transfer* pop up screen.

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- Click on the **row selector** in front of the **batch/serial number** that you wish to assign to this transfer.
- Click on **Ok**.

Stock Transfer - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout

Process Format

Reference Type: Adhoc Transfer Date: 18 Jan 2018 9:14:05 AM

Reference: Transfer 1

Final Warehouse: George_Wlse

Requestor: Sarah Milder

Comments

Drag a column header here to group by that column

PartType	PartCode	PartDesc	WarehouseName	BinName	BatchNumber	Quantity	AverageUnitCost	DestWarehouseName	DestBinName	Direction
C	2020-147K	Black toner SP2020	Main Warehouse	A1		1 341.00	457.42	IN TRANSIT	TRANSIT BIN	I

Select a batch/serial no. for this transfer

Home

Ok Back Save Layout

Process Format

Drag a column header here to group by that column

IdBatchNu...	IdBinName	IdQuantity	IdAverageUnitCost
147	A1	487.00	457.42
147K-2017...	A1	850.00	457.42
20-99999	A1	1.00	457.42
20160701	A1	1.00	457.42
65478	A1	2.00	457.42

Total 613 403.17

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SELECT QUANTITY

- Click on the **Quantity** text box and either *type in* or use the *arrow indicators* to select the **stock quantity** that is required for this transfer.

Note: Remember that for **A** or **B**-Class items, the **Quantity** can only be **1** per line.

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- The ***Destination Warehouse Name*** and ***Destination Bin Name*** text boxes are auto populated with ***In Transit*** and ***Transit Bin***.

SAVE TRANSFER DETAILS

- When you have finished working in this screen, click on ***Save***.

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PRINT TRANSFER NOTE

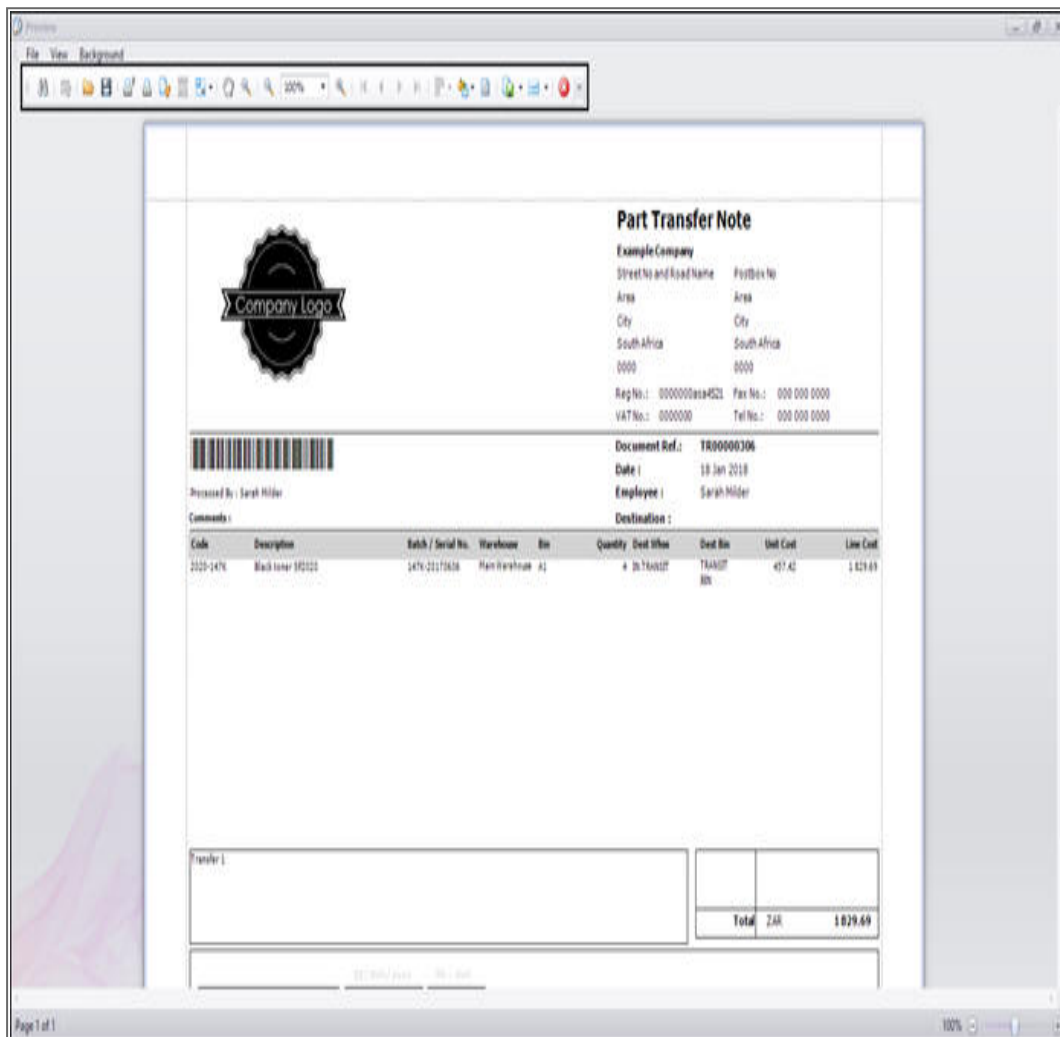
- You will return to the *Stock Transfer* screen.
- A *Report Generation* message box will pop up asking;
 - *Do you want to print the transfer []?*
- Click on *Yes*.

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- You will return to the ***Stock Status*** screen.
- A ***Part Transfer Processing*** message box will pop up informing you that;
 - ***Part Transfer No. [] saved successfully.***
- Click on ***OK***.



- You can now view the **Report Preview** screen.
- From here you can **View, Print, Export** or **Email** the Part Transfer Note.
- **Close** the Report Preview screen when you are finished.



- Follow the instructions for [Action Stock Transfer Request](#) to transfer the part from the *Intransit* warehouse to the *final* warehouse.

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