

INVENTORY

INTER-SITE STOCK TRANSFER (BRANCH TO BRANCH)

This process enables transfer of item(s) from a selected warehouse in a *particular site* to a warehouse in a *different site*.

You will need to ensure that the Company Configuration Enforce In-transit flag is set to 'No' to be able to complete this process.

Unlike in the <u>Inter-Bin Stock Transfer</u> process, in this process, the **Source** warehouse will be different from the **Final/Destination** warehouse.

Take note of the important notes below:

- i. You will need to ensure that the Company Configuration **Enforce Intransit flag** is set to '**No**' to be able to complete this process.
- ii. This will be a *direct transfer* to a *different warehouse* within a *different site*, and *no* receiving is required.
- iii. Ensure that you select the correct *quantity* to be transferred.
- iv. Ensure that you select from the correct *batch number* (C-Class item) or select the correct *serial number* (A or B-Class item) to be transferred.
- v. Ensure that the correct *final/destination warehouse* in the new *destination site* is selected.

Ribbon Access: *Inventory > Stock*





The *Stock Status* screen will be displayed.

TRANSFER - C-CLASS ITEM

SELECT SOURCE SITE

- 1. Select the source location or *site* where the C-class stock is currently being stored.
 - In this example *Durban* is selected.
- 2. The screen status will default to *In Stock* only.
 - This status can remain selected.



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SELECT SOURCE WAREHOUSE

- Click on the drop-down arrow in the *Warehouse* field and select from the list the *'source warehouse'* (where the stock is *currently* being stored).
 - In this image, *Main Warehouse* has been selected.



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1. The *Selected Warehouse* frame will populate with all the items currently in stock in that warehouse.

SELECT C-CLASS ITEMS FOR TRANSFER

- Click on the *item line* of the C-Class part that you wish to transfer.
 Drag and *drop* this line
- 3. into the *Selected Items* frame.



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- 1. The *Selected Items* frame will now contain a copy of the item line.
- 2. Click on *Stock Transfer*.



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- The *Stock Transfer* screen will be displayed.
 - **Reference Type:** Click on the drop-down arrow and select **ADHOC**.
 - **Reference:** Type in your reference for this stock transfer.
 - Final Warehouse: For this process, the Final warehouse will be the same as the Destination warehouse. The Final warehouse is only different when using the In-Transit warehousing process. (For this inter-bin transfer process we will address this field in the next image.)
 - **Requestor:** This will auto populate with the person currently logged on to the system. You can click on the



drop-down arrow and select an alternative person if required.

- **Transfer Date and Time:** This will auto populate with the current date and time.
 - **Date:** You can either type in or click on the drop-down arrow and use the calendar function to select an alternative date if required.
 - **Time:** You can either type in or use the directional arrows to select an alternative time if required.
- **Comments:** Type in a comment relating to the reason for the stock transfer

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SELECT FINAL WAREHOUSE

• **Final Warehouse:** Click on the *search* button in this field.

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- The *Select a destination warehouse for this transfer* screen will pop up.
- Click on the *row selector* in front of the *warehouse* that you wish to be the *final destination* warehouse.

Note: As you are doing an *inter site stock transfer* - ensure that you select a different *final* warehouse and site from the *source* warehouse and site.

• Click on *Ok*.



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1. As the *Final Warehouse* field populates with the selection made in the previous step, the *Destination Warehouse Name* column in the parts data grid will also populate with the selection made.

SELECT DESTINATION BIN

- 2. Note: If there is only 1 bin linked to the final warehouse then the *Dest Bin Name* field will also populate with that 1 bin name. If, however there are 2 or more bins linked to the *Destination Warehouse* than the system will leave the field *blank* for you to make the correct bin selection.
 - In this example, there is only 1 bin linked to the CPT
 Main warehouse therefore the Dest Bin Name field
 has been populated with that one bin name.





PARTS DATA GRID

- 1. **Part Type:** This will auto populate with part type code of the item type selected in the *Stock Status* screen.
 - **Part Code:** This will auto populate with the part code of the item selected in the *Stock Status* screen.
 - **Part Desc:** This will auto populate with the part description of the item selected in the *Stock Status* screen.
 - Warehouse Name: This will auto populate with the source Warehouse Name selected in the *Stock Status* screen.
 - **Bin Name:** This will auto populate with the Bin Name <u>only</u> if there is **1** bin linked to the selected warehouse.



Otherwise,

- i. Click in this field to reveal an *ellipsis* button.
- ii. Click on this button.
- iii. From the Select a destination bin for this part transfer screen that pops up, select the correct bin location name.
- iv. Click on Ok.
- If there is only 1 batch of the selected item available in the selected bin then the Batch Serial No field will populate with that batch number. However, If there is *more than one* batch then the system will leave this field *blank* for you to select the batch number.
 - In this example, there is only *1* batch available to select from, therefore the *Batch Serial No* field is populated.
- You will note that the *Quantity* field will initially auto populate with the total quantity of items available in all the batches in the selected source warehouse bin.
- 4. The *Average Unit Cost* field will be populated with the average cost of *all* of the selected item type in the selected bin.



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Select Quantity

• Click in the *Quantity* field and either type in or use the directional arrows to select the amount of items to be transferred.

Note: The system will *not* allow you select for transfer more than the quantity available in the batch.

SAVE TRANSFER

• Click on *Save*.



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- A *Part Transfer Processing* message box will pop up informing you that:
 - Part Transfer No. [] saved successfully.
- Click on Ok.



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	Requestor	Abigail Milne	• •								
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ig a column h	eader here to gr	oup by that column			a da du			5			/
Partiype	PartCode	PartDesc	warenousewame	Binivame	BatchSerialNo	Quantity	AverageUnitCost	Destwinservame	DestBinName	D	rection
с	SP19-147C	Cvan Toner - SP1919	Main Warehouse	DBN-A1	AM03003	1.00	350.00	CPT Main	Main Bin-1	ī	
			Dart Tr	anofer Process							
			Part Tr	ansfer Processi Part Transf	ing fer No. TR0000037;	2 saved success	× fully.				
			Part Tr	ansfer Processi Part Transf	ing fer No. TR00000372	2 saved success	х fully. ЭК				
			Part Tr	Part Transf	ing fer No. TR00000372	2 saved success	× fully.				
			Part Tr	ansfer Processi Part Transf	ing fer No. TR00000372	2 saved success	× fully.				
			Part Tr	Part Transf	ing fer No. TR00000372	2 saved success	× fully.				
			Part Tr	Part Transf	ing fer No. TR00000372	2 saved success	× fully.				
			Part Tr	Part Transf	ing fer No. TR0000037;	2 saved success	X fully. X				
			Part Tr	Part Transf	ing fer No. TR00000372	2 saved success	X fully. 9K				

PRINT TRANSFER NOTE

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



	Ŧ		Stoc	k Transfer - BP	O: Version 2.1.0.6	6 - Example Co	mpany			1000)
Ho	e Equipment	and Locations Contract	t Finance and HR Inv	ventory Main	tenance and Proje	cts Manufaci	turing Procurement	Sales Serv	ice Reporting	Utilities	-	Ð
9 (5											
ave B	ack Save Layo	ut										
Dracoss	Earmat											
Troccas	a romac	<u>.</u>				2015						
	Reference Type	Adhoc		Transfer Date	06 Nov 2018	• 9:36:53	AM 🗘					
	Reference	AB0007001	* .[Comments	to the Cane Town	warehouse to b	e available when the Ca	ne Town based o	istomer is ready to	receive it		
F	Final Warehouse	CPT Main	٩	Stock to be serie	to the cope rown	Marchouse to b		pe ronn bused o	astomer is ready to	receive its		
	Requestor	Abigail Milne	-									
												_
PartType	PartCode	PartDesc	WarehouseName	BinName	BatchSerialNo	Quantity	AverageUnitCost	DestWhseName	DestBinName		Directio	n
							St. and the state					
	SP19-147C	Cyan Toner - SP1919	Main Warehouse	DBN-A1	AM03003	1.00	350.00	CPT Main	Main Bin-1		I	_
			Repor	t Generation		×	1					
			Repor	t Generation		×						
			Repor Do y	t Generation	nt the transfer TR(00000372?						
			Repor Do y	t Generation	nt the transfer TR/	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX					,	
			Repor Do y	t Generation You want to prin	nt the transfer TRG	> 00000372? No						
			Repor Do y	t Generation	nt the transfer TRI Yes	00000372? Ne						
			Repor Do y	t Generation rou want to priv	nt the transfer TR(× 00000372? No						
			Report Do y	t Generation ou want to prin	nt the transfer TR(00000372? No						
			Report Do y	t Generation	nt the transfer TR(>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>						
			Report Do y	t Generation	nt the transfer TR	00000372? No			otal			350.

The *Report Preview* screen will be displayed.

- 1. You can see that **1** item has been transferred from
- 2. the *Main Warehouse* and *DBN-A1* bin into the
- 3. *CPT Main* warehouse and *Main Bin-1*.
- 4. From here you can *View*, *Print*, *Export* or *Email* the Part Transfer Note.
- 5. *Close* the Report Preview screen when you are done.



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	4	Bart Transfer Note Example Company Street No and Road Name PO Bo Area New T City Durbas South Africa South South Africa South Mono 1234 Reg No.1 000000ar4521 YAT No.1 0000000x Date : OF Nono Final Miner Solid	x 1234 ovn Africa -: 031 12 4545 -: 031 123 4567
Comments : Steckrobe ant to the Cape Ton based customer is ready to rece Code Description SP15-147C Cyan Toner - SP1919	n varahouse to be available when the Cipp Town be 2. Batch / Serial No. Warehouse Bin AM03003 Main Warehouse OBII-A1 Q	Destination : Quantity Dest Whee Dest Bin 1 CFT Main Main Bin 1 1 3	Unit Cost Line Cost 350.00 350.00
A80007001		Total	ZAR 350.00
AB0007001	m./ yyyy blics.mm te Time	Total	ZAR 350.00

• You will return to the *Stock Status* screen.

VIEW C-CLASS ITEM IN DESTINATION WAREHOUSE

Select Destination Site

- Click on the drop-down arrow in the *Site* field and select the *destination site*.
 - In the example above, the destination site selected was *Cape Town*.



	Ŧ			Stoc	k Status - BPO: \	/ersior	n 2.1.0.66 - Examp	e Company					1		×
Ho	me Equipment and	Locations C	ontract Finance and	HR Inve	entory Mainte	nance	and Projects Ma	nufacturing	Procurement	Sales	Service	Reporting	Utilities	- 6	x R
Requisition	Stock Stock II Transfer Adjust	nter Warehouse Request	Save Layout Wor	rkspaces	Durban Mame All Sites Durban	•									
Selected W	arehouse :				Pretoria Cape Town										а
	Warehouse Main	Warehouse	•]	Johannesburg			er here to g							
Drag a colum	n header here to group	by that column			×			ypeDesc	PartCode	PartName		ModelNo	Category	esc (Category
PartType	PartTypeDesc	PartCode	PartName	ModelNo	CategoryDesc	Categ									
٩															
▶ 🖽 A	Serialised Equipment	SP2020	SP2020 Sprint Colo	SP2020	Hardware	M									
€C	Non Serialised Parts	2020-147K	Black toner SP2020		Toners	TC									
ΞA	Serialised Equipment	SP 19 19	SP 19 19 Sprint Colo	1919	Hardware	м.									
⊞ C	Non Serialised Parts	SP19-147K	Black Toner SP1919		Toners	TC									
⊕ C	Non Serialised Parts	SP19-147C	Cyan Toner - SP 1919		Toners	TC									
⊞ C	Non Serialised Parts	SP19-147Y	Yellow Toner - SP1		Toners	TC									
⊕ C	Non Serialised Parts	SP19-147M	Magenta toner - SP		Toners	TC									
œ C	Non Serialised Parts	2020-147M	Magenta toner SP2		Toners	TC									
⊞ C	Non Serialised Parts	2020-147C	Cyan toner SP2020		Toners	TC									
⊞ C	Non Serialised Parts	2020-147Y	Yellow toner SP2020		Toners	TC									
€C	Non Serialised Parts	CL-100-965	Cleaner		Stationery	51									
ΞA	Serialised Equipment	1458-96523	K147 Kyocera Colo	K147	Kyocera Mul	м.									
⊞ C	Non Serialised Parts	147-888544	K147 Black toner		Toners	TC									
ΞA	Serialised Equipment	KZN-122TFB	Kruger ZN Fax Mac	ZN122	Hardware	м.									
⊕ C	Non Serialised Parts	12345ZN	ZN Paper		Stationery	51									
€C	Non Serialised Parts	147-888741	K147 Yellow Toner		Toners	TC									
⊞ C	Non Serialised Parts	K147-888123	K147 Magenta Toner		Toners	TC									
⊞ C	Non Serialised Parts	K147-888478	K147 Cyan Toner		Toners	TC									
⊞ C	Non Serialised Parts	9855632	Air Freshner		Stationery	51									
⊞ A	Serialised Equipment	SP19-123456	SP19-12 Colour Co	SP19-12	Hardware	м.									
⊕ C	Non Serialised Parts	12-098765	SP19-12 Black Toner		Toners	TC									
⊞ C	Non Serialised Parts	2020-147L	SP2020 Clear Toner		Toners	TC									
⊞ C	Non Serialised Parts	102-7854	Network cable		Spare Parts	SF									
ΞA	Serialised Equipment	SP204	SP204 Colour Copier	SP204	Hardware	м.									
E A	Serialised Equipment	204-147K	SP204 Black Toner		Toners	T([▼]	+								+
Open Windo	ws ▼												01 Nov 2	18	÷ //

1. The *Status* can remain as *In Stock Only*.

Select Destination Warehouse

- 2. Click on the drop-down arrow in the *Warehouse* field and select the *destination warehouse*.
 - In the example above, the destination warehouse selected was *CPT Main*.



	Ŧ			Stoc	k Status - BPO: 1	Versior	2.1.0.66 - Exam	ple Company					- 0		×
H	Equipment and I	Locations C	ontract Finance and	HR Inve	entory Mainte	nance	nd Projects	lanufacturing	Procurement	Sales	Service	Reporting	Utilities -	8	x
Intelle		1993			-										
			LESS		Cape Town	•		8							
Requisition	Stock Stock Ir	nter Warehouse	Save Layout Wo	rkspaces	In Stock Only		Refresh Expo	rt							
	Process	Request	Earmat		Ourre	at	Drint	(1							
- Selected V	Varehouse :		a i ormat		Curre	inc.	Selected Iter	4	· · · · · ·						a
	Warehouse			1											
	ሰ Na	ame	1				DeskTune D		DaukCarda	Deuthland	20	Madahia	Calana Day	-	
Drag a colun	in header here to CPT I	Main			~		Parti ype P	artiypebesc	PartCode	Paruvalin	÷	Modelino	Categorypes	. Lai	egory
PartType	PartTypeDesc In Tra	ansit CPT		ModelNo	CategoryDesc	Categ									
٩						1									
▶ ⊞ A	Serialised Equip			SP2020	Hardware	M	2								
€C	Non Serialised				Toners	TC									
ΞA	Serialised Equip 🗙			1919	Hardware	M									
⊞ C	Non Serialised Parts	SP19-147K	Black Toner SP1919		Toners	TC									
ШC	Non Serialised Parts	SP19-147C	Cyan Toner - SP 19 19		Toners	TC									
⊞ C	Non Serialised Parts	SP19-147Y	Yellow Toner - SP1		Toners	TC									
€C	Non Serialised Parts	SP19-147M	Magenta toner - SP		Toners	TC									
ΞC	Non Serialised Parts	2020-147M	Magenta toner SP2		Toners	TC									
⊞ C	Non Serialised Parts	2020-147C	Cyan toner SP2020		Toners	TC									
€C	Non Serialised Parts	2020-147Y	Yellow toner SP2020		Toners	τ									
ΞC	Non Serialised Parts	CL-100-965	Cleaner		Stationery	51									
ΞA	Serialised Equipment	1458-96523	K147 Kyocera Colo	K147	Kyocera Mul	M									
⊞ C	Non Serialised Parts	147-888544	K147 Black toner		Toners	TC									
ΞA	Serialised Equipment	KZN-122TFB	Kruger ZN Fax Mac	ZN122	Hardware	м.									
⊞ C	Non Serialised Parts	12345ZN	ZN Paper		Stationery	57									
€C	Non Serialised Parts	147-888741	K147 Yellow Toner		Toners	TC									
⊞ C	Non Serialised Parts	K147-888123	K147 Magenta Toner		Toners	TC									
⊞ C	Non Serialised Parts	K147-888478	K147 Cyan Toner		Toners	TC									
⊞ C	Non Serialised Parts	9855632	Air Freshner		Stationery	51									
⊞ A	Serialised Equipment	SP19-123456	SP19-12 Colour Co	SP19-12	Hardware	M.									
€C	Non Serialised Parts	12-098765	SP19-12 Black Toner		Toners	TC									
⊞ C	Non Serialised Parts	2020-147L	SP2020 Clear Toner		Toners	TC									
⊞ C	Non Serialised Parts	102-7854	Network cable		Spare Parts	SF									
ΞA	Serialised Equipment	SP204	SP204 Colour Copier	SP204	Hardware	M									
E A	Serialised Equipment	204-147K	SP204 Black Toner		Toners	TC									
Open Windo	ows 🕶												01 Nov 2018	ć	
															- 1h

View Transferred Stock

- 1. The *Selected Warehouse* frame will populate with a list of the *In-Stock* items.
 - In this example, the transferred item is the *only* item in the destination warehouse.
- 2. Click on the *expand* button in the item line.





The *Stock* frame will be expanded. Here you can see that

- 1. **1** item
- 2. from *BatchSerial Number* [the batch number as selected above]
- 3. has been transferred to *Bin Name* [the bin name as selected above].



Inter-Site Stock Transfer (Branch to Branch)

	Ŧ			Stor	k Status - BPO: '	Version 2.1.0.6	i6 - Example (Company				2772		×
H	ome Equipment a	and Locations	Contract Finance ar	id HR Inv	entory Mainte	enance and Pro	jects Manu	facturing Procure	ment Sale	s Service	Reporting	Utilities	-	8 X
	P 40		2		Cape Town	• 22	RES							
Requisition	Stock Stock Transfer Adjust	Inter Warehous Request	se Save Layout W	orkspaces	In Stock Only		Export							
	Process		" Format		Curre	nt	a Print a							
Selected \	Warehouse :		11.			1	Selected I	tems						4
	Warehouse C	PT Main	9	•										
Drag a colur	nn header here to g	roup by that colum	n		1	- /	PartType	PartTypeDesc	PartCode	PartName		ModelNo	Categor	yDesc (
PartType	e PartTypeDesc	PartCode	PartName	ModelNo	CategoryDesc	Category	9							
9														
▶ 🗆 C	Non Serialised Pa	irts SP19-147C	Cyan Toner - SP 1919)	Toners	TOMNGR								
St	ock													
٩	BatchSerialNo	BinName Q	uantity											
٩														
• 1	AM03003	Main Bin-1	1.00											
1	•	•	A											
			1											
	2	3												
1						•	4		-					÷
Open Winde	ows 🔻											01 No	v 2018	

- 1. *Collapse* the frame and
- 2. *Close* the screen when you are done.



	•	2					Stoc	k Status - BPO: 1	Version 2.1.0.	66 - E	xample C	ompany				1000		>	ţ.
0	Hom	e Equipmen	t and L	ocations C	Contract F	inance and	HR Inv	entory Mainte	nance and Pro	jects	Manuf	acturing Procu	ement Sale	s Service	Reporting	Utilities	-	Ð	х
	*		(j)	1	2			Cape Town	• 2										
Requis	ition	Stock Stoc Transfer Adju	st In	iter Warehous Request	e Save La	yout Wo	rkspaces	In Stock Only		h	Export								
		Process				Format		Curre	nt	. 1	Print 🔒								
Selec	ted Wa	arehouse :								Se	lected It	ems							4
		Warehouse	CPT M	lain		•				Dr								1	
Drag a											PartType	PartTypeDesc	PartCode	PartName		ModelNo	Categor	yDesc	C
Part	Туре	PartTypeDesc		PartCode	PartName		ModelNo	CategoryDesc	Category	F				1					-
		Non Serialised I	Parts	SP19-147C	Cvan Toner	- SP 19 19		Toners	TOMNGR										
	Stoc	k																	
	۹ Bat	tchSerialNo	Bint	Name Qu	antity														
	¥ ► AM	103003	Mai	in Bin-1	1.00														
			1.000.0																
-									•	4									+
Open	Window	/S T														01 No	v 2018		

You will return to the *Stock Status* screen.

TRANSFER A OR B-CLASS ITEM

To transfer an A or B-Class item, you will follow *almost* exactly the same process as for above. The only differences are found in the *BatchSerialNo*, *Quantity* and *Average Unit Cost* fields in the *Stock Transfer* screen.

SELECT SOURCE SITE

- 1. Select the *source site* (the site where the A or B-Class item is currently stored).
 - In this image, *Durban* has been selected.
- 2. The status can remain as *In Stock Only*.



SELECT SOURCE WAREHOUSE

- 3. Select the *source warehouse* (the warehouse where the A or B-Class item is currently stored).
 - In this image, *Main Warehouse* has been selected.

po	¥			Stoc	k Status - BPO: 1	Version 2.1.0	Example Company — 🗌	8
Hor	me Equipment and I	Locations C	ontract Finance and	HR Inv	entory Mainte	nance and Pr	ts Manufacturing Procurement Sales Service Reporting Utilities	Ð
			S.		Durban	- 42		
equisition	Stock Stock Ir	nter Warehouse	Save Layout Wo	rkspaces	In Stock Only	Refre	Export	
	Transfer Adjust	Request		÷	IT Stock Only			
	Process		" Format	4	Curre	nt	Print 2	
elected W	arehouse :		100 100				elected Items	
	Warehouse Main	Warehouse]←	(3		
rag a colum	n header here to group	by that column	n		10	/	PartType PartTypeDesc PartCode PartName ModelNo Categor	yDes
PartType	PartTypeDesc	PartCode	PartName	ModelNo	CategoryDesc	Category		
í l								
± A	Serialised Equipment	SP2020	SP2020 Sprint Colo	SP2020	Hardware	MAMNGR		
⊞ C	Non Serialised Parts	2020-147K	Black toner SP2020		Toners	TOMNGR		
ΞA	Serialised Equipment	SP 19 19	SP 1919 Sprint Colo	1919	Hardware	MAMNGR		
⊞ C	Non Serialised Parts	SP19-147K	Black Toner SP 1919		Toners	TOMNGR		
⊞ C	Non Serialised Parts	SP19-147C	Cyan Toner - SP 1919		Toners	TOMNGR		
⊞ C	Non Serialised Parts	SP19-147Y	Yellow Toner - SP1		Toners	TOMNGR		
⊞ C	Non Serialised Parts	SP19-147M	Magenta toner - SP		Toners	TOMNGR		
⊞ C	Non Serialised Parts	2020-147M	Magenta toner SP2		Toners	TOMNGR		
⊞ C	Non Serialised Parts	2020-147C	Cyan toner SP2020		Toners	TOMNGR		
⊞ C	Non Serialised Parts	2020-147Y	Yellow toner SP2020		Toners	TOMNGR		
⊞ C	Non Serialised Parts	CL-100-965	Cleaner		Stationery	STCOOT		
⊞ A	Serialised Equipment	1458-96523	K147 Kyocera Colo	K147	Kyocera Mul	MAKYMEC		
⊞ C	Non Serialised Parts	147-888544	K147 Black toner		Toners	TOMNGR		
🗄 A	Serialised Equipment	KZN-122TFB	Kruger ZN Fax Mac	ZN122	Hardware	MAMNGR		
⊞ C	Non Serialised Parts	12345ZN	ZN Paper		Stationery	STCOOT		
⊞ C	Non Serialised Parts	147-888741	K147 Yellow Toner		Toners	TOMNGR		
⊞ C	Non Serialised Parts	K147-888123	K147 Magenta Toner		Toners	TOMNGR		
⊞ C	Non Serialised Parts	K147-888478	K147 Cyan Toner		Toners	TOMNGR		
⊞ C	Non Serialised Parts	9855632	Air Freshner		Stationery	STCOOT		
ΞA	Serialised Equipment	SP19-123456	SP19-12 Colour Co	SP19-12	Hardware	MAMNGR		
51 0	Non Serialised Parts	12-098765	SP19-12 Black Toner		Toners	TOMNGR		
±ι	Non Serialised Parts	2020-147L	SP2020 Clear Toner		Toners	TOMNGR		
⊞ C		102.7954	Network cable		Spare Parts	SPMNGR		
⊞ C ⊞ C	Non Serialised Parts	102-7034						
te c te c te c te a	Non Serialised Parts Serialised Equipment	SP204	SP204 Colour Copier	SP204	Hardware	MAMNGR		

SELECT A OR B-CLASS ITEM FOR TRANSFER

- 1. Click on the *item line* of the A or **B-Class** item you wish to transfer.
 - In this image an *A-Class* item has been selected.
- 2. *Drag* and *drop* this line into the *Selected Items* frame.



	Ŧ			Stock Sta	tus - BPO: Versi	on 2.1.0.66	5 - Exam	ple Cor	mpany						\rightarrow	$\langle \rangle$
Hor	me Equipment and	Locations C	Contract Finance and HR	Inventory	Maintenanc	e and Proje	ects M	lanufac	turing Procure	ment Sales	Service	Reporting	Utilities	-	8	×
		Ŵ		Durba	an 🔻	B										
Requisition	Stock Stock Ir	nter Warehouse	Save Layout Workspace	es In Sto	ock Only 🔻	Refresh	Export									
	Transfer Adjust	Request	-													
	Process		4 Format	4	Current		Print .	4								
- Selected W	arehouse :						Selec	ted It	ems							4
	Warehouse Main	Warehouse	1				Drag									
Drag a colum			n				Pa	rtType	PartTypeDesc	PartCode	PartName		ModelNo	Categor	ryDesc	C
PartType	PartTypeDesc	PartCode	PartName	ModelNo	CategoryDesc	Category	9									
9			•			-		-								
▶ 🗄 A	Serialised Equipment	SP2020	SP2020 Sprint Colour Multi	SP2020	Hardware -	MAMNO		2								
€C	Non Serialised Parts	2020-147K	Black toner SP2020		Toners	TOMING										
⊞ Á	Serialised Equipment	SP1919	SP 19 19 Sprint Colour MFC	1919	Hardware	MAMINC										
⊞ C	Non Serialised Parts	SP19-147K	Black Toner SP 1919		Toners	TOMING										
⊞ C	Non Serialised Parts	SP19-147C	Cyan Toner - SP1919		Toners	TOMING										
⊞ C	Non Serialised Parts	SP19-147Y	Yellow Toner - SP1919		Toners	TOMING										
⊞ C	Non Serialised Parts	SP19-147M	Magenta toner - SP1919		Toners	TOMING										
⊞ C	Non Serialised Parts	2020-147M	Magenta toner SP2020		Toners	TOMING										
⊞ C	Non Serialised Parts	2020-147C	Cyan toner SP2020		Toners	TOMING										
⊞ C	Non Serialised Parts	2020-147Y	Yellow toner SP2020		Toners	TOMING										
⊞ C	Non Serialised Parts	CL-100-965	Cleaner		Stationery	STCOC										
ΞA	Serialised Equipment	1458-96523	K147 Kyocera Colour Copier	K147	Kyocera Mul	MAKYM										
⊞ C	Non Serialised Parts	147-888544	K147 Black toner		Toners	TOMING										
ΞA	Serialised Equipment	KZN-122TFB	Kruger ZN Fax Machine	ZN122	Hardware	MAMNC										
⊞ C	Non Serialised Parts	12345ZN	ZN Paper		Stationery	STCOC										
⊞ C	Non Serialised Parts	147-888741	K147 Yellow Toner		Toners	TOMING										
⊞ C	Non Serialised Parts	K147-888123	K147 Magenta Toner		Toners	TOMING										
⊞ C	Non Serialised Parts	K147-888478	K147 Cyan Toner		Toners	TOMING										
⊞ C	Non Serialised Parts	9855632	Air Freshner		Stationery	STCOC										
E A	Serialised Equipment	SP19-123456	SP19-12 Colour Copier	SP19-12	Hardware	MAMNC										
⊞ C	Non Serialised Parts	12-098765	SP19-12 Black Toner		Toners	TOMING										
E C	Non Serialised Parts	2020-147L	SP2020 Clear Toner		Toners	TOMING										
⊞ C	Non Serialised Parts	102-7854	Network cable		Spare Parts	SPMNG										
⊞ A	Serialised Equipment	SP204	SP204 Colour Copier	SP204	Hardware	MAMNC										
E A	Serialised Equipment	204-147K	SP204 Black Toner		Toners	TOMING										
E C	Non Serialised Parts	204-147C	SP204 Cyan Toner		Toners	TOMING -										
∢ ⊂						F.	10								_	F
Open Window	ws 🔻												01 No	v 2018		

- 1. The *Selected Items* frame will now contain a copy of the A -Class item line.
- 2. Click on *Stock Transfer*.



	Ŧ			Stock Sta	tus - BPO: Versi	on 2.1.0.6	i6 - Example	e Com	pany				- 1) X
Ho	me Equipment and	Locations C	Contract Finance and HR	Inventory	Maintenanc	e and Proj	ects Mar	nufacti.	iring Procureme	nt Sales	Service	Reporting L	Itilities -	- 8 ×
Requisition	Stock Stock In	nter Warehouse	Save Lavout Workspace	Durba	an 🔹	Refresh	Export							
	Transfer Adjust	Request		10,50	JCK Only									
	Process	~		4	Current		Print 4							
- Selected V	/arehouse :		~ 2			_	Selected	Item	5					ų.
	Warehouse Main	Warehouse	•				Drag a co							
Drag a colum	n header here to group	by that column	1			1	PartTy	pe Pa	rtTypeDesc	PartCode	PartName		ModelNo	CategoryDes
PartType	PartTypeDesc	PartCode	PartName	ModelNo	CategoryDesc	Categor	9	_			-		-	
Ŷ						*	► A	Se	rialised Equipment	SP2020	SP2020 Spr	int Colour Multi	SP2020	Hardware
	Serialised Equipment	SP2020	SP2020 Sprint Colour Multi	SP2020	Hardware	MAM			1					
ΞC	Non Serialised Parts	2020-147K	Black toner SP2020		Toners	TOMP			/					
⊞ A	Serialised Equipment	SP1919	SP 19 19 Sprint Colour MFC	1919	Hardware	MAM			/					
⊡ C	Non Serialised Parts	SP19-147K	Black Toner SP 1919		Toners	TOMP			1					
⊞ C	Non Serialised Parts	SP19-147C	Cyan Toner - SP1919		Toners	TOMP		1	1					
⊞ C	Non Serialised Parts	SP19-147Y	Yellow Toner - SP1919		Toners	TOMP								
⊞ C	Non Serialised Parts	SP19-147M	Magenta toner - SP1919		Toners	TOM								
⊞ C	Non Serialised Parts	2020-147M	Magenta toner SP2020		Toners	TOMP								
⊞ C	Non Serialised Parts	2020-147C	Cyan toner SP2020		Toners	TOMP								
⊞ C	Non Serialised Parts	2020-147Y	Yellow toner SP2020		Toners	TOMP								
⊞ C	Non Serialised Parts	CL-100-965	Cleaner		Stationery	STCC U								
ΞA	Serialised Equipment	1458-96523	K147 Kyocera Colour Copier	K147	Kyocera Mul	MAKY								
⊞ C	Non Serialised Parts	147-888544	K147 Black toner		Toners	TOMP								
ΞA	Serialised Equipment	KZN-122TFB	Kruger ZN Fax Machine	ZN122	Hardware	MAM								
⊞ C	Non Serialised Parts	12345ZN	ZN Paper		Stationery	STCC								
⊞ C	Non Serialised Parts	147-888741	K147 Yellow Toner		Toners	TOMP								
⊞ C	Non Serialised Parts	K147-888123	K147 Magenta Toner		Toners	TOMP								
⊞ C	Non Serialised Parts	K147-888478	K147 Cyan Toner		Toners	TOMP								
⊞ C	Non Serialised Parts	9855632	Air Freshner		Stationery	STCC								
ΞA	Serialised Equipment	SP19-123456	SP19-12 Colour Copier	SP19-12	Hardware	MAM								
⊞ C	Non Serialised Parts	12-098765	SP 19-12 Black Toner		Toners	TOMP								
⊞ C	Non Serialised Parts	2020-147L	SP2020 Clear Toner		Toners	TOMP								
⊞ C	Non Serialised Parts	102-7854	Network cable		Spare Parts	SPMN								
ΞA	Serialised Equipment	SP204	SP204 Colour Copier	SP204	Hardware	MAM								
ΞA	Serialised Equipment	204-147K	SP204 Black Toner		Toners	TOMP								
⊞ C	Non Serialised Parts	204-147C	SP204 Cyan Toner		Toners									
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PARTS DATA GRID

Add the details to the <u>References</u> frame as explained in the <u>Transfer C-Class</u> <u>Item to a Different Site Warehouse</u> process above.

QUANTITY

- 1. You will note that:
 - i. The *Quantity* field displays **0**. (Unlike C-Class items, where this field is initially populated with the entire amount of the items available in the selected warehouse bin).
 - ii. The *Average Unit Cost* field displays **0**.
- 2. Click in the *BatchSerialNo* field.



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- An *ellipsis* button will be revealed. Click on this button to display the Select a batch//serial no. for this transfer pop up screen.
- 2. You will see that you will only be able to select **1** (Quantity) item at a time.
- 3. As this is an **A** or **B-Class item**, you will see that this screen lists the **Serial Nos**.



				Stock Tran	sfer - BPO: Vers	sion 2.1.0.66 ·	Example C	Company			- 0
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SELECT ITEM TO TRANSFER

- Click on the *row selector* in front of the *item* you wish to transfer.
- Click on Ok.



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• The *Quantity* field will now populate with **1** (only 1 A or B-Class item can be selected at a time) and the *Average Unit Cost* field will now populate according to the cost of the selected serial no.



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SELECT DESTINATION BIN

- If not already populated (if, for example there is more than 1 bin in the destination warehouse) then select the *Destination Bin* name at this point.
- 2. Click on Save.



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- A *Part Transfer Processing* message box will pop up informing you that;
 - Part Transfer No. [] saved successfully.
- Click on OK.



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PRINT TRANSFER NOTE

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



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The *Report Preview* screen will be displayed.

- 1. In this image you can see that the selected A-Class item has pulled through to the Part Transfer Note.
- 2. From here you can *View*, *Print*, *Export* or *Email* the document.
- 3. Note that the item is being transferred from the original warehouse and bin
- 4. to the selected destination warehouse and bin.
 - *Close* the Report Preview screen when done.



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• You will return to the *Stock Status* screen.

VIEW A OR B-CLASS ITEM IN DESTINATION WAREHOUSE

 To view the A Class item in the Destination Warehouse, follow the <u>View the C-Class item in the Destination Warehouse</u> process.

MNU.037.011