

# **INVENTORY**

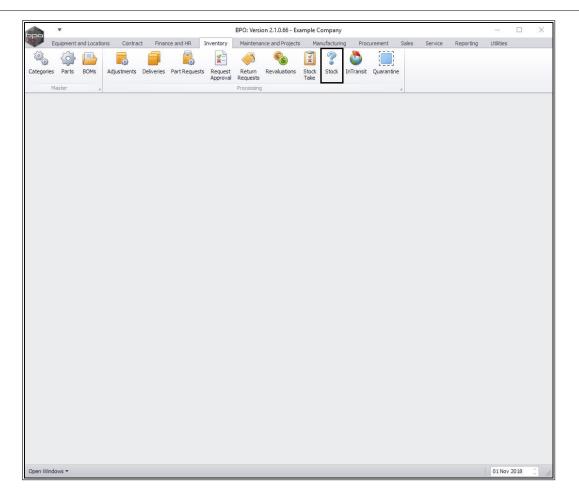
# IN-TRANSIT INTER-WAREHOUSE TRANSFER

This process is similar to the Inter-Bin Stock Transfer process with the differences as noted below.

- i. You will need to ensure that the Company Configuration <a href="Enforce Intransit flag">Enforce Intransit flag</a> is set to 'Yes' to be able to complete this process.
- ii. Once stock is transferred to the 'In-Transit' warehouse, the stock must then be Received from the In-Transit warehouse into the destination warehouse.
- iii. The stock transfer process differs slightly for an **A** or **B-Class** item compared to a **C-Class** item. This manual gives the example of **both** class types to help explain the differences.

**Ribbon Access:** *Inventory > Stock* 





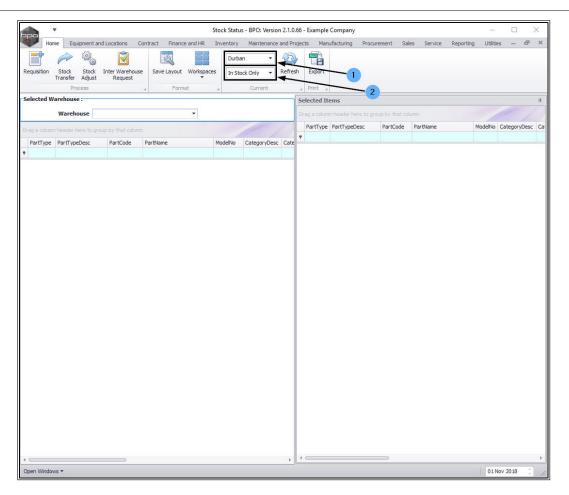
The **Stock Status** screen will be displayed.

# TRANSFER A, B OR C-CLASS ITEMS

#### **SELECT SOURCE SITE**

- Select the *source* location or *site* (where the stock is currently).
  - In this image *Durban* has been selected.
- This screen will open in the *In Stock Only* status.
  - This can remain unchanged.

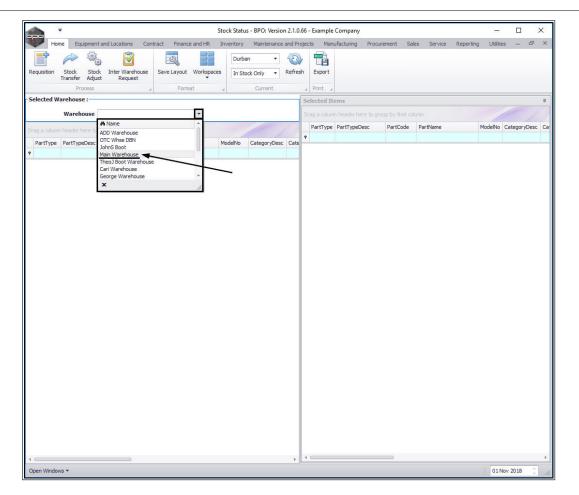




#### **SELECT SOURCE WAREHOUSE**

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





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

#### **SELECT ITEMS TO TRANSFER**

1. Click on the *item lines* of the A or B-Class item and the C-Class item that you wish to transfer.

Note: You can select multiple items in 2 ways:

Either

• Click in the row of the first item line, press and hold the *Shift* button on your keyboard, use the *arrows* on your keyboard to select



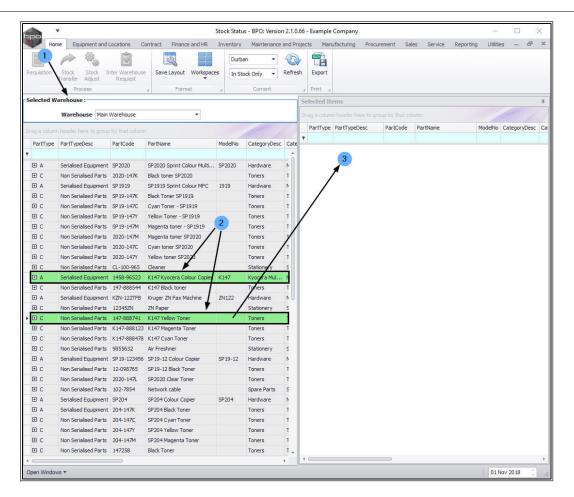
the items in order. (The items should all be highlighted as they are selected).

Or

- Click on the first item, then hold the *Ctrl* button on your key-board, whilst using your *mouse* to click on the other item lines that you wish to add. Use this method for items that are not in order. (The items should all be highlighted as they are selected).
- Once you have selected multiple items using either of the above methods, click on any of the highlighted item lines and *drag and drop* it into the *Selected Items* frame. All the selected lines will be copied across to this frame

**Note:** You <u>cannot</u> use the same item line number <u>more than</u> once on a multi-line stock transfer.

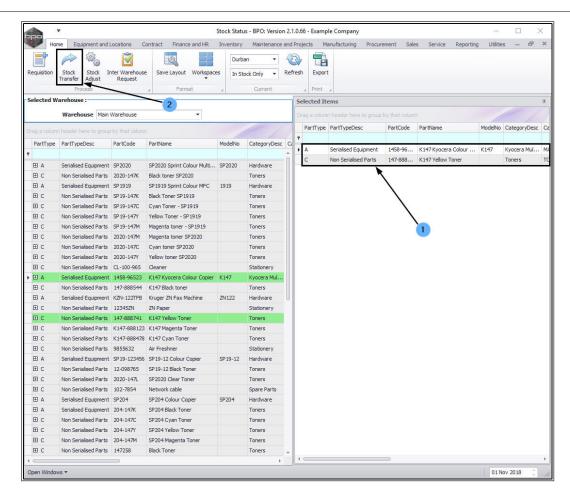




#### TRANSFER ITEMS TO IN-TRANSIT WAREHOUSE

- 1. You can see in this image that all the item lines have been copied to the *Selected Items* frame.
- 2. Click on Stock Transfer.



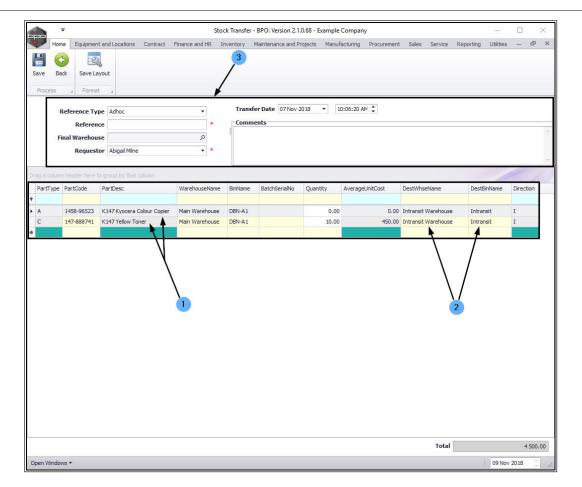


- The **Stock Transfer** screen will be displayed.
- 1. In this image, you can see that all the selected item lines have been brought across to this screen.
- 2. You will note that the system has auto populated the *Destination Ware-house Name* and *Destination Bin Name* fields with the name of the intransit warehouse and bin as set up in Warehouse Configuration.
- 3. Fill in the details in the *References* frame:
  - Reference Type: Click on the drop-down arrow and select ADHOC.
  - Reference: Type in your reference for this stock transfer.



- **Final Warehouse:** (This will be covered 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

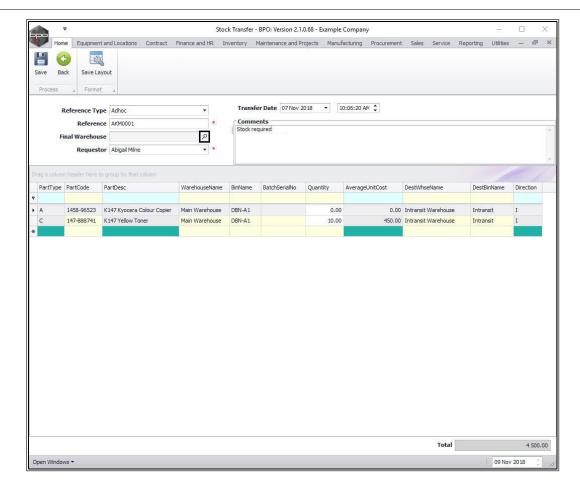




#### **SELECT FINAL DESTINATION WAREHOUSE**

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

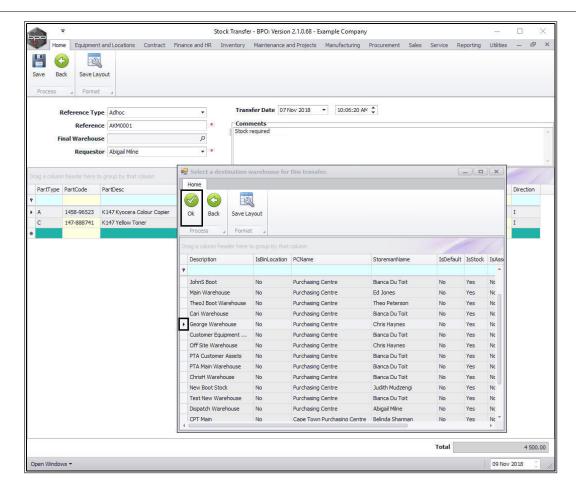




The **Select a destination warehouse for this transfer** screen will pop up.

- Click on the *row selector* in front of the *warehouse* that you wish to be the *final destination* warehouse. This is the warehouse that will *receive* the items from the In-Transit Warehouse.
- Click on Ok.



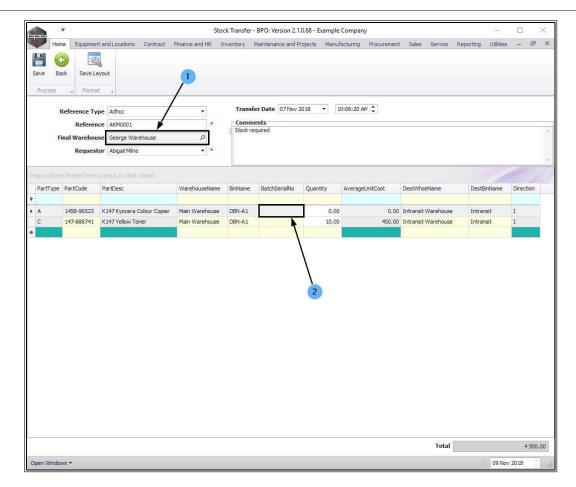


1. The *Final Destination* field will populate with the selected warehouse.

# SELECT SERIAL NO, QUANTITY AND UNIT COST FOR A OR B-CLASS ITEM

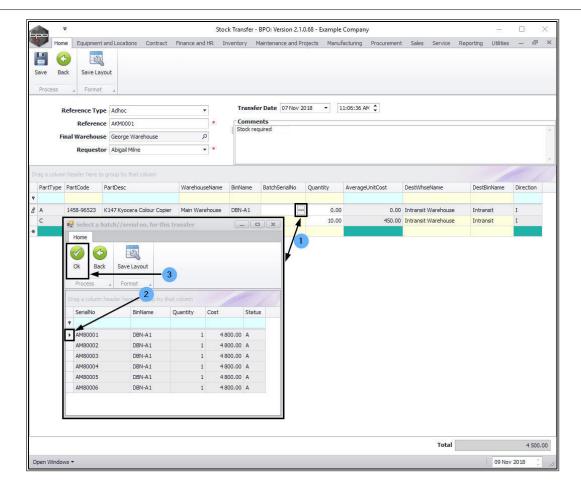
2. Click in the **Batch Serial Number** field of the **A**-Class Item.





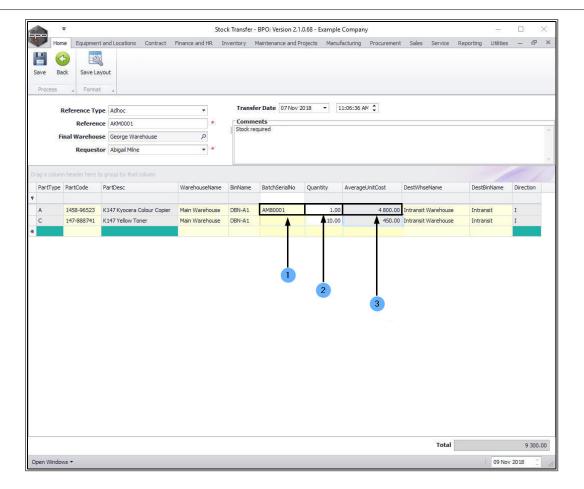
- 1. An *ellipsis* button will be revealed. Click on this button to bring up the *Select a batch//serial number for this transfer* screen.
  - As this is an A-Class item, the system will display a list of Serial numbers.
- 2. Click in the *row selector* in front of the *Serial No* of the item that you wish to transfer.
- 3. Click on Ok.





- 1. As the selected serial number populates the **Batch Serial No** text box,
- 2. the *Quantity* field will populate with **1** (only *one***A** or **B**-Class item can be selected per item row) and
- 3. the *Average Unit Cost* field will populate with the cost of the selected serialised item.

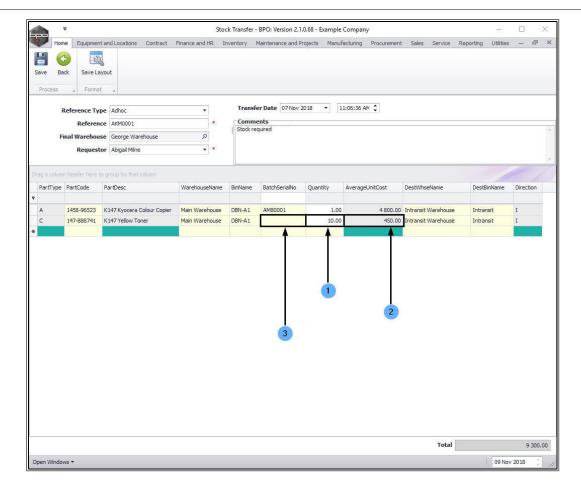




# SELECT SERIAL NO, QUANTITY AND UNIT COST FOR C-CLASS ITEM.

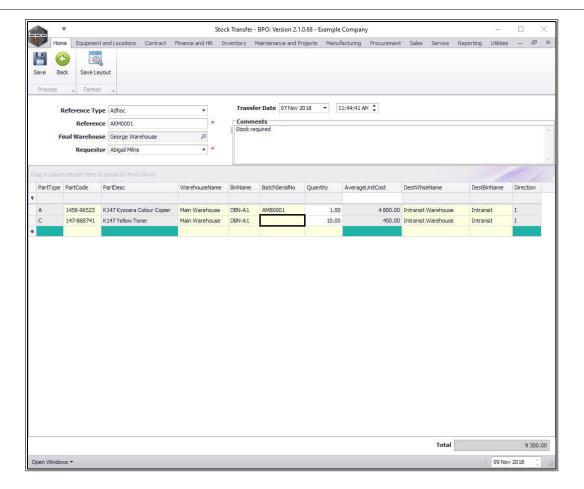
- 1. You will note that the *Quantity* field will initially auto populate with the *total* quantity of items available in all the batches in the selected source warehouse bin.
- 2. The *Average Unit Cost* fields will be populated with the average cost of all of these items in the selected bin.
- 3. If there is only **one** 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.





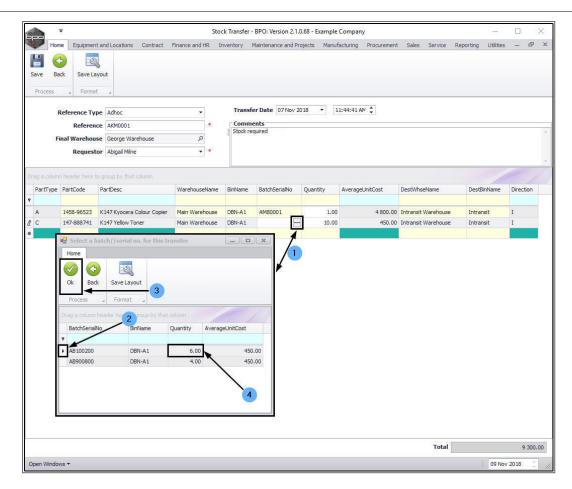
• Click in the Batch Serial No field of the C-Class item.





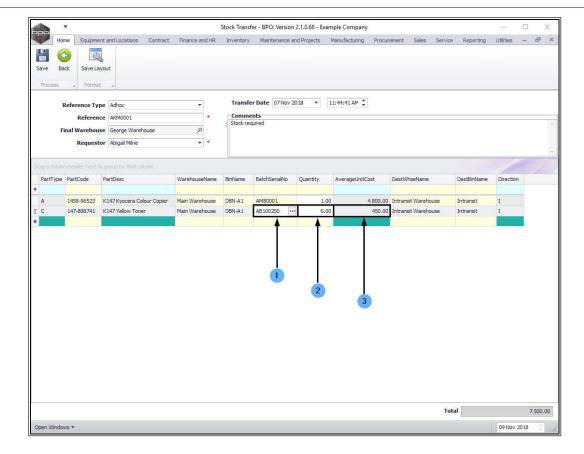
- 1. An *ellipsis* button will be revealed. Click on this button to display the *Select a batch//serial no. for this transfer* pop up screen.
  - As this is a *C-Class item*, you will see that this screen lists the *Batch* Serial Nos.
- 2. Click on the *row selector* in front of the *batch/serial* no that you wish to select an item from, for the stock transfer.
- 3. Click on *Ok*.
- 4. Make note of the *quantity* available in the selected batch. (We will refer to this in the next image).





- 1. The *Batch Serial No* field will now be populated with the batch number selected in the previous step.
- 2. The *Quantity* field will now be populated with the quantity of the specific batch selected in the previous step.
  - This can be *changed* as explained in the next step.
- 3. The amount in the *Average Unit Cost* field will remain the same as it is calculate across all batches.



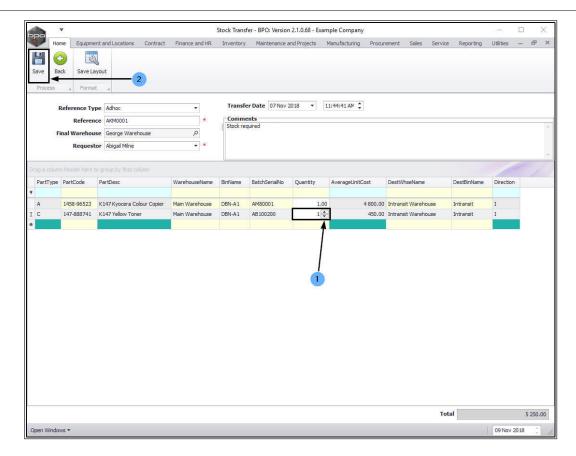


- Click in the *Quantity* field and either type in or use the directional arrows to select the *quantity* of the C-Class item that you wish to transfer.
  - Remember the system will not let you exceed the quantity in the selected batch.
  - In this image **1** item is to be transferred.

#### **SAVE TRANSFER**

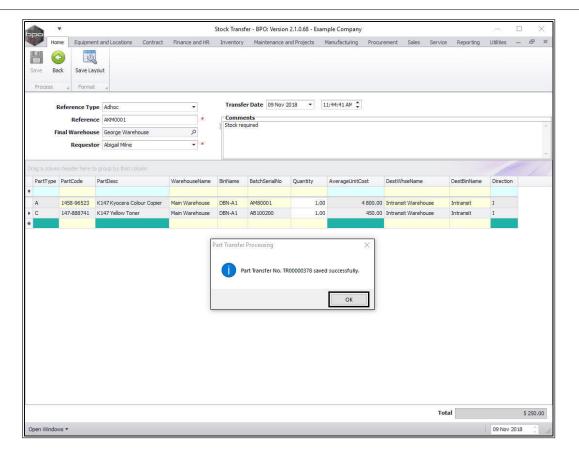
2. Click on Save.





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

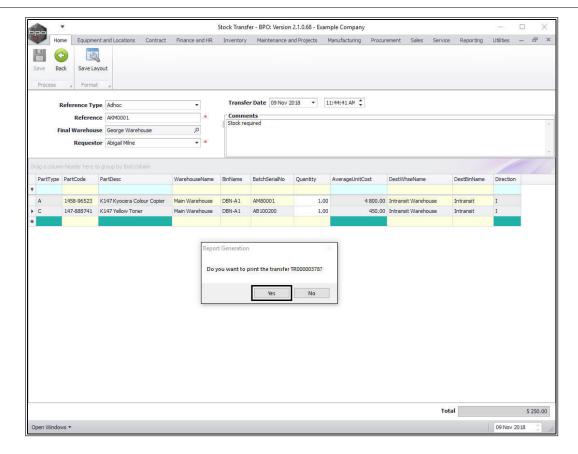




#### **PRINT TRANSFER NOTE**

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

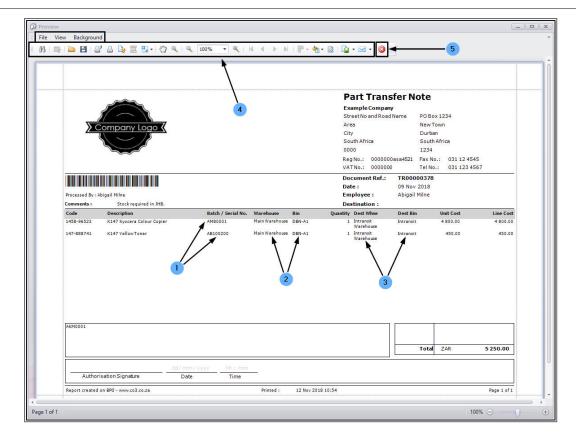




The **Report Preview** screen for the Part Transfer Note will be displayed.

- 1. Here you can view the item *batch* and *serial* numbers that were selected.
- 2. You can view the source warehouse and source bin.
- 3. You can view the *destination warehouse* is the *In-transit* warehouse and *destination bin* is the *In-transit* bin.
- 4. From here you can *View*, *Print*, *Export* or *Email* the Part Transfer Note.
- 5. *Close* the Report Preview screen when done.



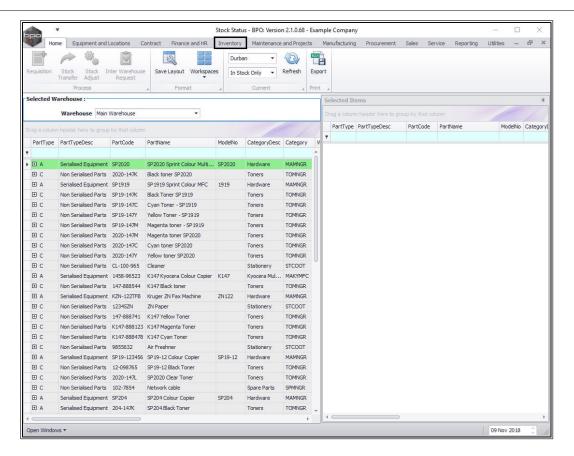


You will return to the Stock Status screen.

# VIEW TRANSFERRED ITEMS IN INTRANSIT WAREHOUSE

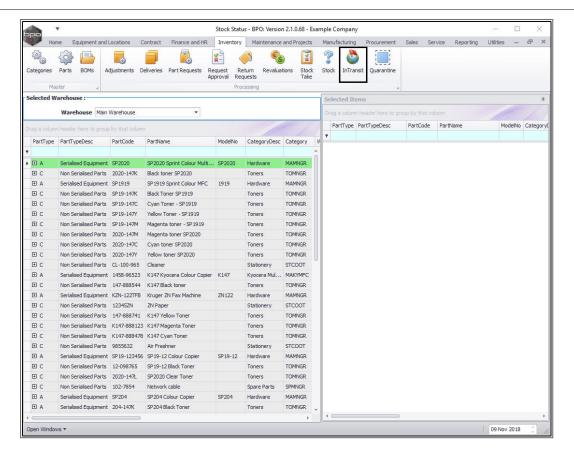
• Click on the *Inventory* ribbon tab.





• Click on the InTransit action button.

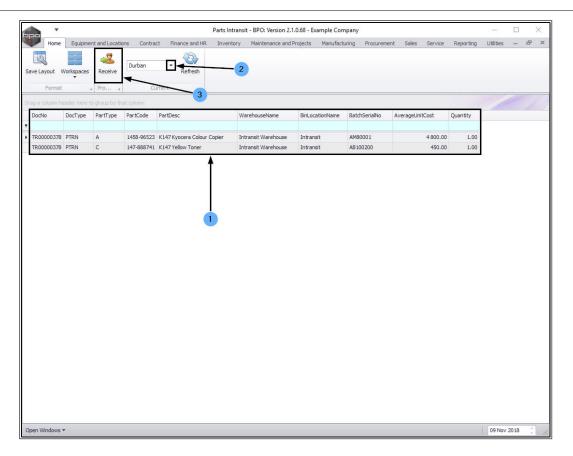




#### The **Parts InTransit** screen will be displayed.

- 1. Here you can view a list of the **A** and **C**-Class items transferred from the source warehouse.
- 2. You may need to select the *site* if the system has opened the screen in a different site.
- 3. In this screen you can receive the items.





#### **Related Topics**

Receive Stock Transfer from In-Transit Warehouse to final Destination
Warehouse

MNU.037.012