

# INVENTORY

## RECEIVE STOCK TRANSFER FROM IN-TRANSIT WAREHOUSE

Stock must be transferred to the In-Transit warehouse before the goods can be received into the Destination Warehouse. Refer to [In-Transit Inter-Warehouse Transfer](#) or [Action Stock Transfer Request](#).

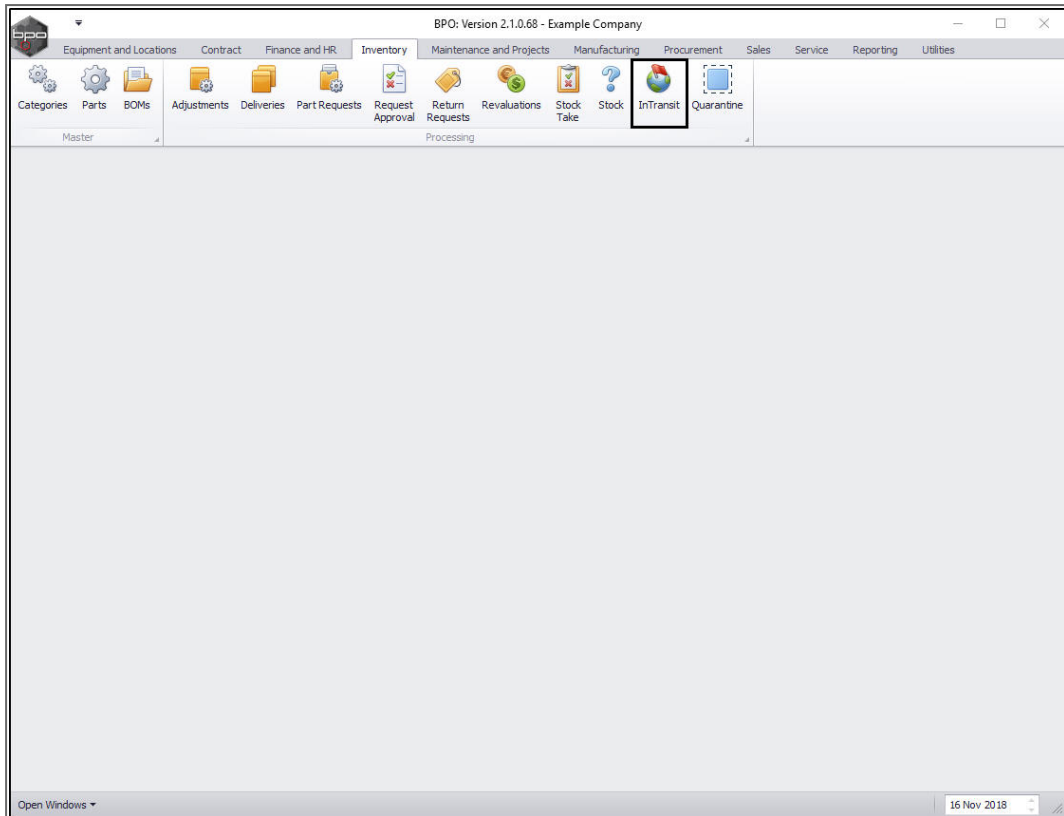
- You can transfer and receive items from warehouse to warehouse in the **same** site e.g.
  - the Main Warehouse in Durban to the In-Transit Warehouse to the George Warehouse in Durban.
- Or you can transfer and receive items warehouse to warehouse in **different** sites e.g.
  - the Main Warehouse in Durban to the In-Transit Warehouse to the PTA Warehouse in Pretoria.

You will need to ensure that the Company Configuration **Enforce In-transit flag** is set to 'Yes' to be able to complete this process.

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

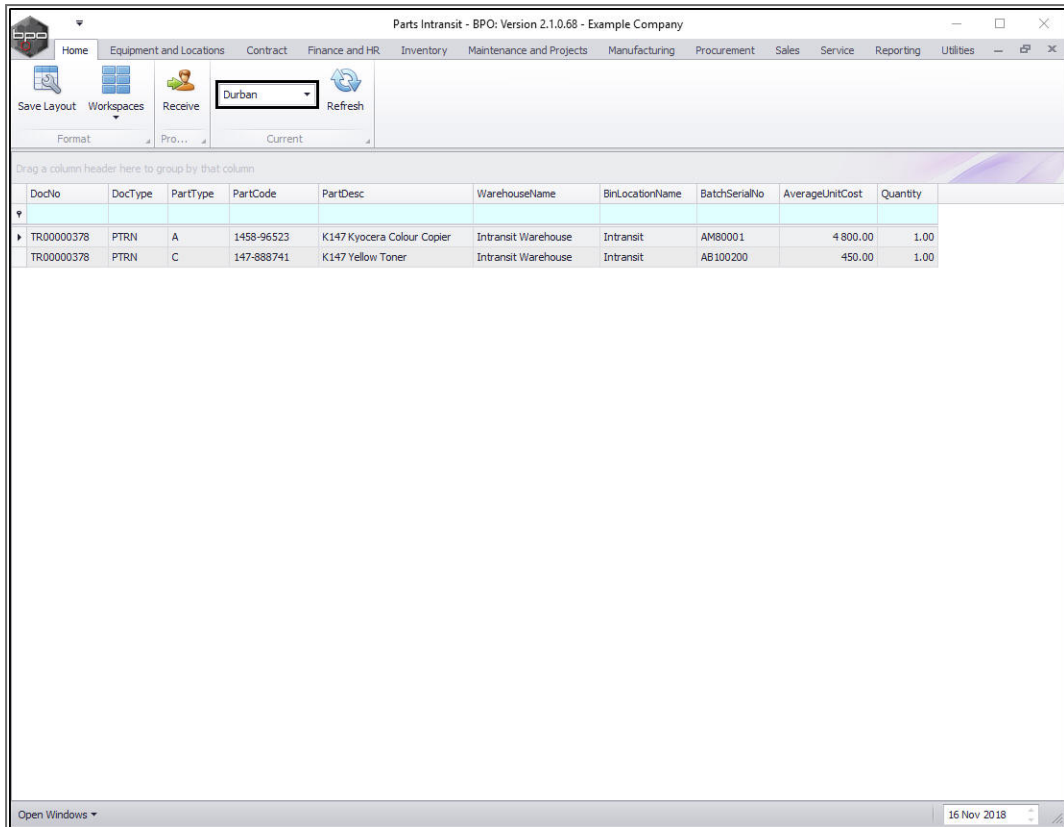
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The **Parts In-Transit** listing screen will be displayed.

Select the Site

- Select the **site** where the item(s) are being received.
  - In this image **Durban** has been selected.



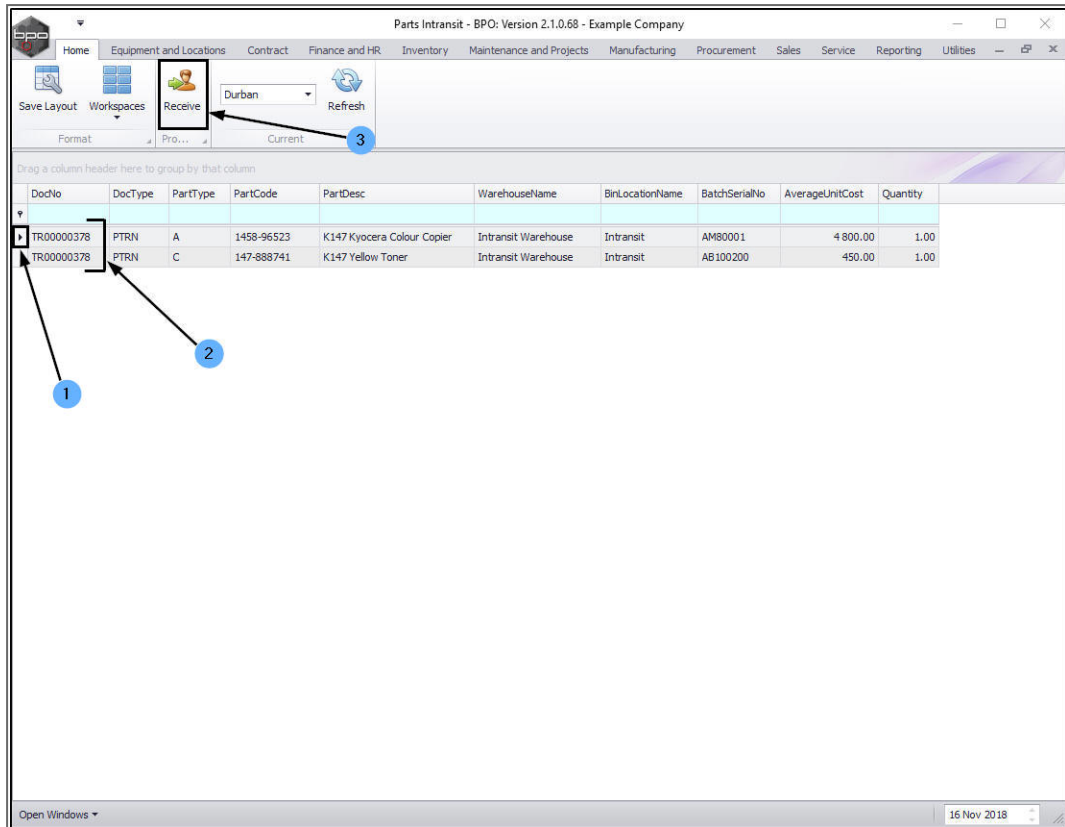
The screenshot shows the 'Parts Intransit' software interface. The title bar reads 'Parts Intransit - BPO: Version 2.1.0.68 - Example Company'. The interface includes a menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu bar is a toolbar with buttons for Save Layout, Workspaces, Receive, Durban (dropdown), and Refresh. A 'Format' dropdown is also present. The main area contains a table with the following data:

DocNo	DocType	PartType	PartCode	PartDesc	WarehouseName	BinLocationName	BatchSerialNo	AverageUnitCost	Quantity
TR00000378	PTRN	A	1458-96523	K147 Kyocera Colour Copier	Intransit Warehouse	Intransit	AM80001	4 800.00	1.00
TR00000378	PTRN	C	147-888741	K147 Yellow Toner	Intransit Warehouse	Intransit	AB100200	450.00	1.00

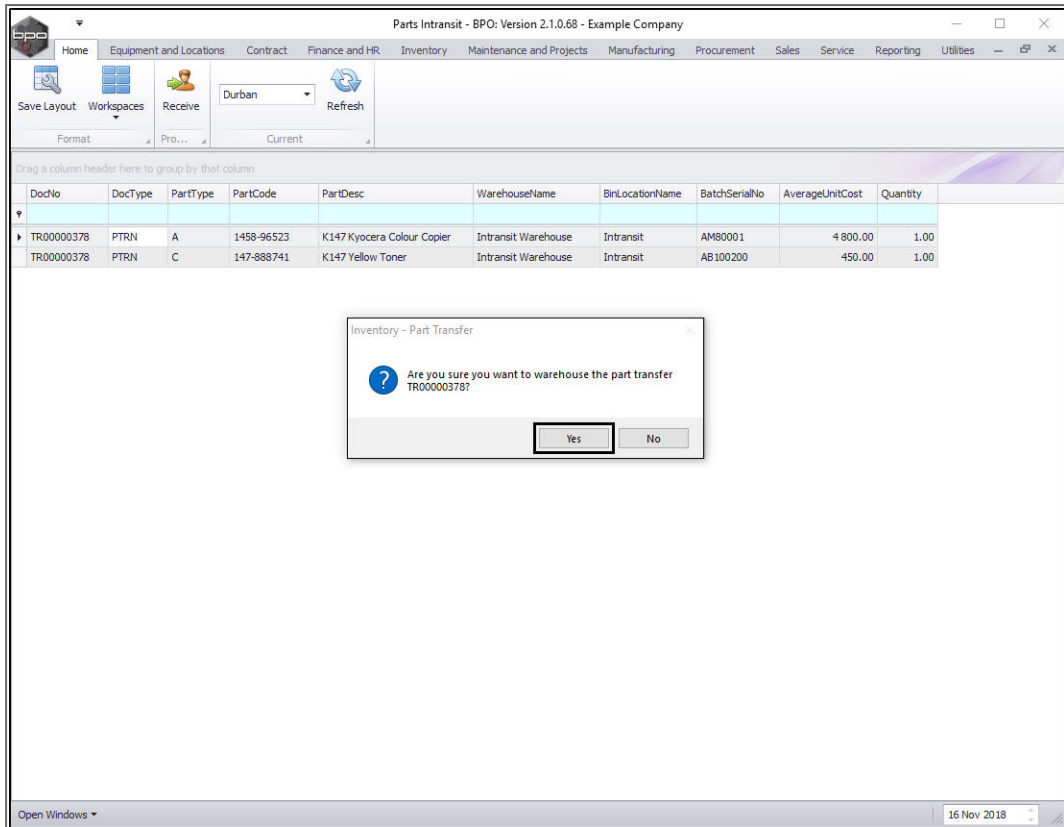
The status bar at the bottom shows 'Open Windows' on the left and the date '16 Nov 2018' on the right.

## SELECT ITEMS TO RECEIVE

1. Click on the **row selector** in front of the **document number** that contains detail(s) of the items that you wish to receive from 'In Transit'.
2. If there is more than **1** item linked to the transfer document then **all** of these items will be pulled across to the **Parts Intransit** screen.
3. Click on **Receive**.



- An **Inventory - Part Transfer** message box will pop up asking;
  - **Are you sure you want to warehouse the part transfer [ ]?**
- Click on **Yes**.

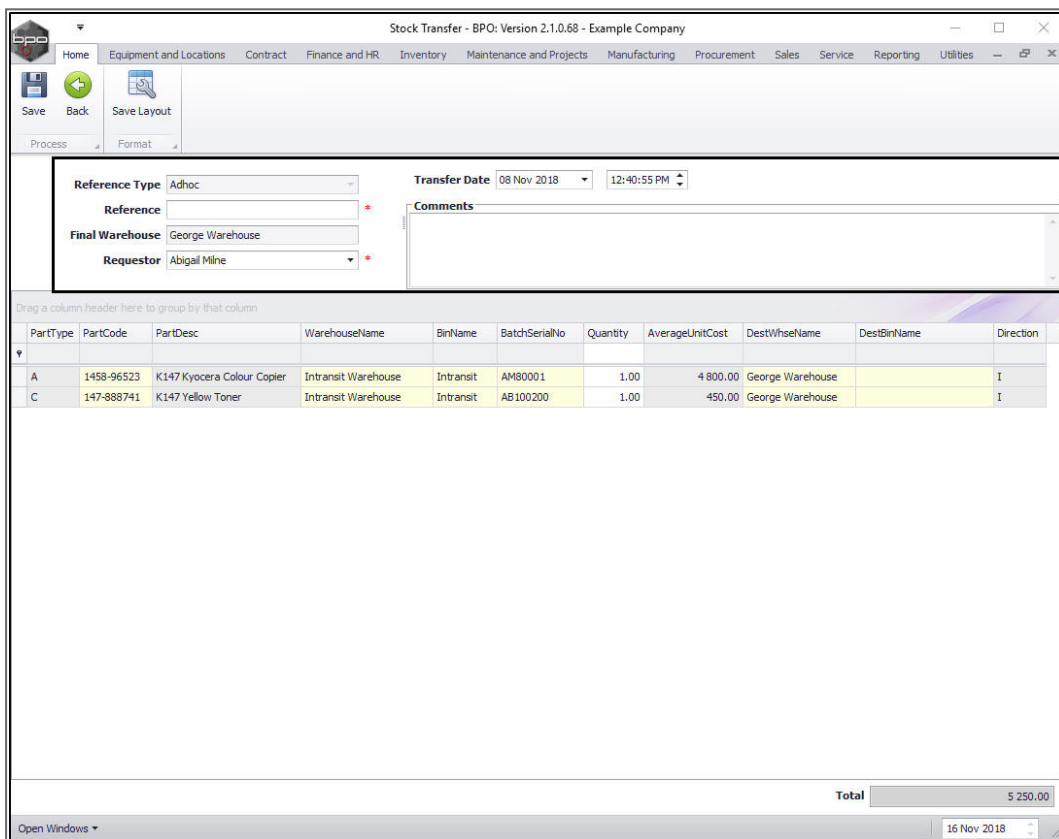


The **Stock Transfer** screen will be displayed.

## STOCK TRANSFER DETAILS

- **Reference Type:** This will auto populate with Adhoc.
- **Reference:** Type in a reference for this transfer.
- **Final Warehouse:** This will populate with the final warehouse as selected in the [In-Transit Inter-Warehouse Transfer](#) process.
- **Requestor:** This will populate with the person currently logged on to the system but you can click on the drop-down arrow and select an alternative employee if required.
- **Transfer Date and Time:** This will populate with the current date and time.

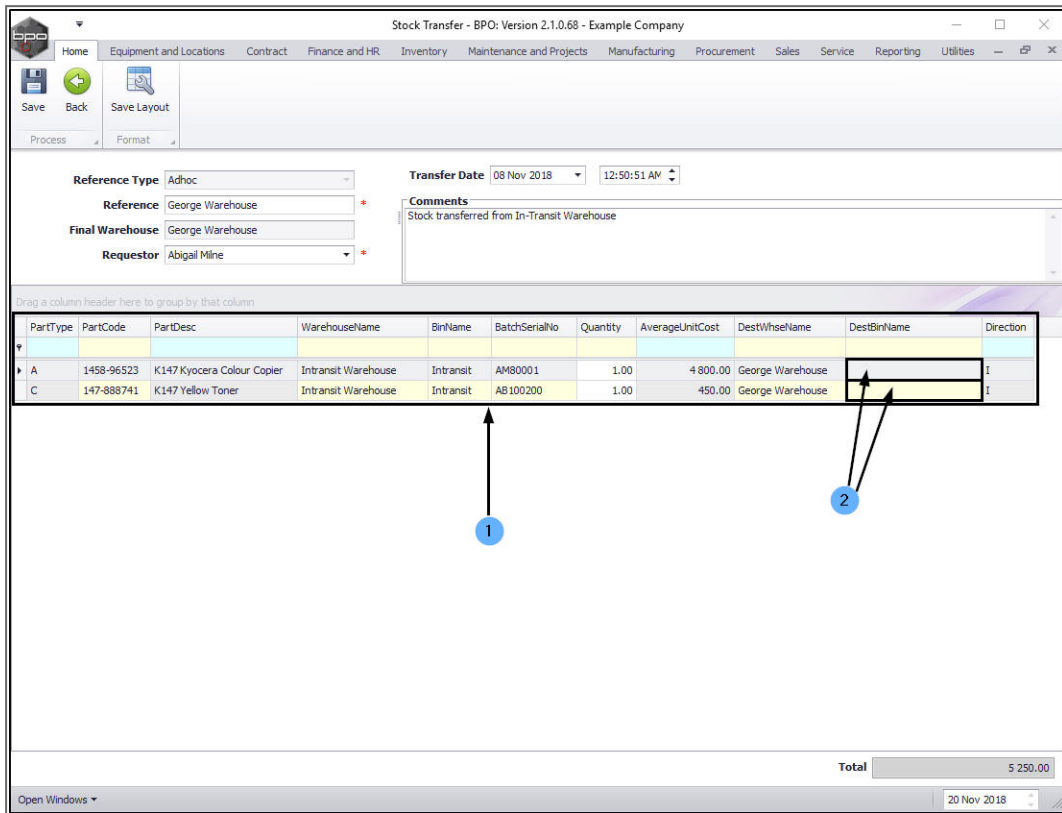
- **Transfer Date:**  
You can either type in or click on the drop-down arrow and use the calendar function to select an alternative date if required.
- **Transfer Time:**  
You can either type in or use the directional arrows to select an alternative time if required.
- **Comments:** Type in a comment relevant to this transfer, if required.



## DESTINATION WAREHOUSE

1. The **Parts** data grid will display all the information of the parts to be transferred including the **Destination Warehouse Name**.

- If there is more than one warehouse **bin** linked to the destination warehouse then the system will leave this field(s) **blank** for you to select the bin.



## SELECT DESTINATION BIN

- Click in the **Destination Bin Name** field of one of the items to be transferred. An **ellipsis** button will be displayed.
- Click on this button to bring up the **Select a destination bin for this part transfer** screen.
- Click on the **row selector** in front of the **bin** you wish to receive this item into.
  - In this image, **George\_Bin** has been selected.
- Click on **Ok**.

The screenshot shows the 'Stock Transfer - BPO' interface. The main window displays transfer details: Reference Type (Adhoc), Reference (George Warehouse), Final Warehouse (George Warehouse), and Requestor (Abigail Milne). The Transfer Date is 08 Nov 2018 at 12:50:51 AM. A comment states 'Stock transferred from In-Transit Warehouse'. Below this is a table of items being transferred:

PartType	PartCode	PartDesc	WarehouseName	BinName	BatchSerialNo	Quantity	AverageUnitCost	DestWhseName	DestBinName	Direction
I	A	1458-96523	K147 Kyocera Colour Copier	Intransit Warehouse	Intransit	AM80001	1.00	4800.00	George Warehouse	
I	C	147-888741	K147 Yellow Toner	Intransit Warehouse	Intransit	AB100200	1.00	450.00	George Warehouse	

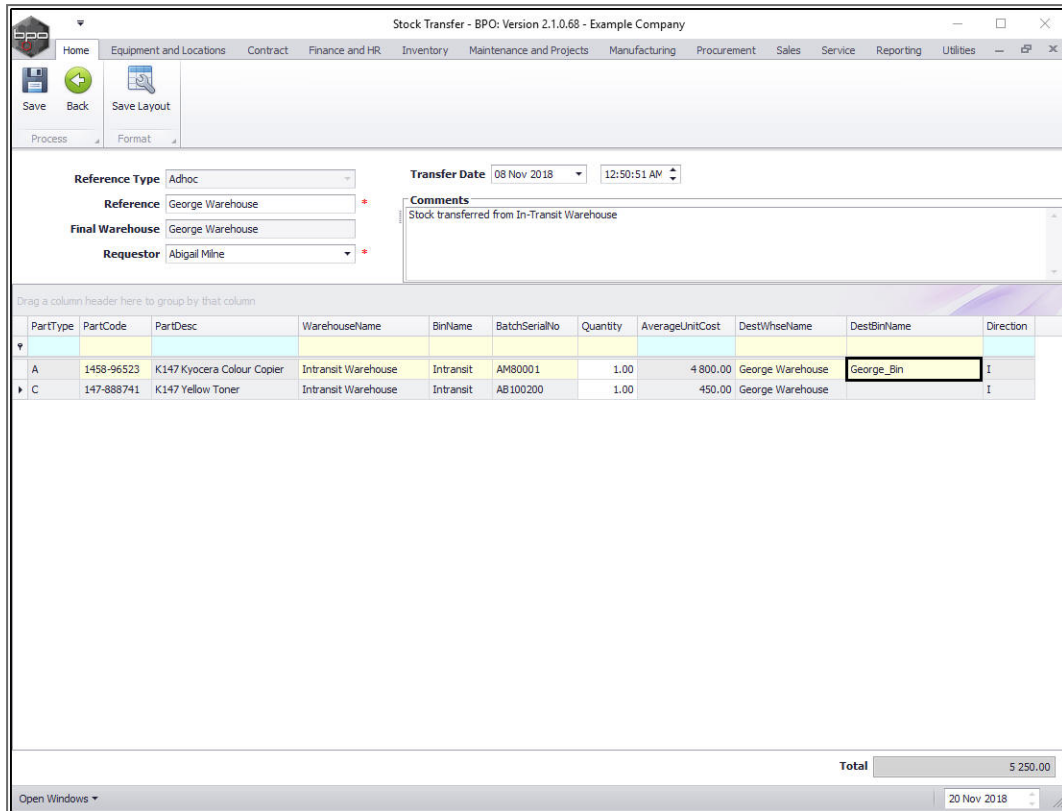
A dialog box titled 'Select a destination bin for this part transfer' is open, showing a table of available bins:

Description	ParentDescription	IsBinLocation	IsStock	IsA...	IsQuarantine	IsDefault
George_Bin	George Warehouse	Yes	No	No	No	No
George_2_Bin	George Warehouse	Yes	No	No	No	No

Annotations in the image indicate the workflow: 1. Clicking the ellipsis button in the 'DestBinName' column of the main table. 2. The dialog box opening. 3. Selecting 'George\_Bin' in the dialog box table. 4. Clicking the 'Ok' button in the dialog box.

- The selected bin will populate the **Destination Bin Name** field.





1. Follow the same process to bring up the **Select** screen again
2. and **select a bin** for each item in the **Stock Transfer** screen.
  - In this image, a different bin: **George\_2\_Bin** has been selected.

Stock Transfer - BPO: Version 2.1.0.68 - Example Company

Reference Type: Adhoc  
 Reference: George Warehouse  
 Final Warehouse: George Warehouse  
 Requestor: Abigail Milne

Transfer Date: 08 Nov 2018 12:50:51 AM  
 Comments: Stock transferred from In-Transit Warehouse

PartType	PartCode	PartDesc	WarehouseName	BinName	BatchSerialNo	Quantity	AverageUnitCost	DestWhseName	DestBinName	Direction
A	1458-96523	K147 Kyocera Colour Copier	Intransit Warehouse	Intransit	AM80001	1.00	4 800.00	George Warehouse	George_Bin	I
Z	C	147-888741	K147 Yellow Toner	Intransit Warehouse	AB100200	1.00	450.00	George Warehouse	George_2_Bin	I

Select a destination bin for this part transfer

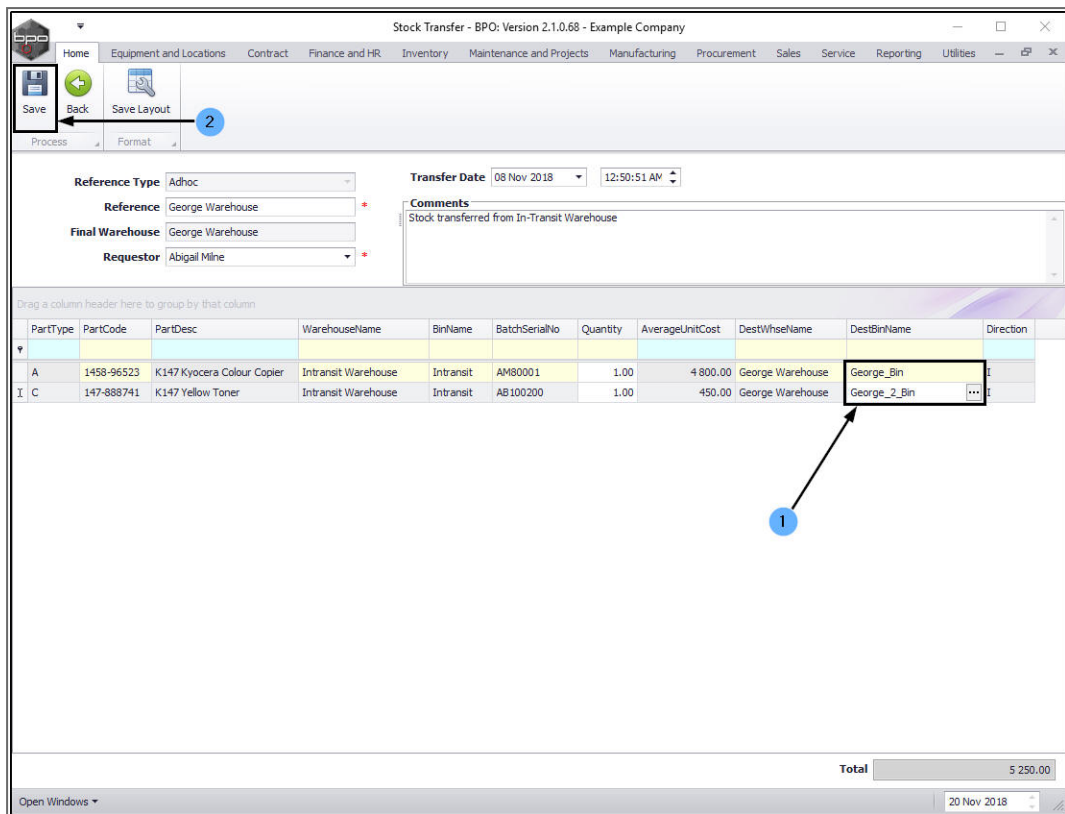
Description	ParentDescription	IsBinLocation	IsSt...	IsAsset	IsQuarantine	IsDefault
George_Bin	George Warehouse	Yes	No	No	No	No
George_2_Bin	George Warehouse	Yes	No	No	No	No

Total: 5 250.00

1. When you are finished with your selection(s)

## SAVE TRANSFER DETAILS

2. Click on **Save**.



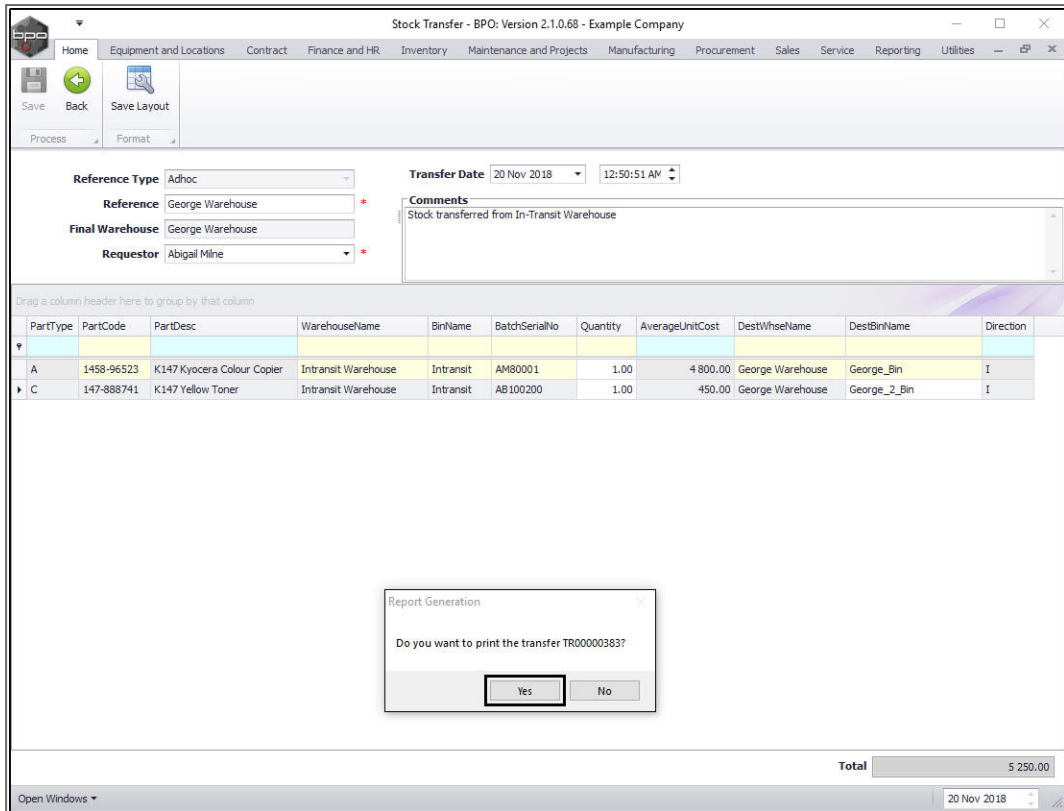
- A **Part Transfer Processing** message box will pop up informing you that;
  - **Part Transfer NO. [ ] has been saved successfully.**
- Click on **OK**.

The screenshot shows the 'Stock Transfer - BPO: Version 2.1.0.68 - Example Company' window. The interface includes a top menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with Save, Back, and Save Layout buttons. The main form area contains fields for Reference Type (Adhoc), Reference (George Warehouse), Final Warehouse (George Warehouse), and Requestor (Abigail Milne). The Transfer Date is set to 20 Nov 2018 at 12:50:51 AM. A Comments field contains the text 'Stock transferred from In-Transit Warehouse'. Below the form is a table with columns: PartType, PartCode, PartDesc, WarehouseName, BinName, BatchSerialNo, Quantity, AverageUnitCost, DestWhseName, DestBinName, and Direction. The table contains two rows of data. A 'Part Transfer Processing' dialog box is open in the center, displaying an information icon and the message 'Part Transfer No. TR00000383 saved successfully.' with an OK button. At the bottom right, a 'Total' field shows '5 250.00'. The status bar at the bottom indicates 'Open Windows' and the date '20 Nov 2018'.

PartType	PartCode	PartDesc	WarehouseName	BinName	BatchSerialNo	Quantity	AverageUnitCost	DestWhseName	DestBinName	Direction
A	1458-96523	K147 Kyocera Colour Copier	Intransit Warehouse	Intransit	AM80001	1.00	4 800.00	George Warehouse	George_Bin	I
C	147-888741	K147 Yellow Toner	Intransit Warehouse	Intransit	AB100200	1.00	450.00	George Warehouse	George_2_Bin	I

## PRINT TRANSFER NOTE

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



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

1. You can see that the items have been transferred from the **Intransit Warehouse** and **Intransit Bin** to
2. the destination **George Warehouse**
3. and to the **2** different **destination bins**.
4. From here you can **View, Print, Export** or **Email** the Part Transfer Note.
5. **Close** the Report Preview screen when you are done.

**Part Transfer Note**

**Example Company**  
 Street No and Road Name PO Box 1234  
 Area New Town  
 City Durban  
 South Africa South Africa  
 0000 1234  
 Reg No.: 0000000asa4521 Fax No.: 031 12 4545  
 VAT No.: 00000000 Tel No.: 031 123 4567

Document Ref.: **TR0000383**  
 Date: 20 Nov 2018  
 Employee: Abigail Milne  
 Destination:

Comments: Stock transferred from In-Transit Warehouse

Code	Description	Batch / Serial No.	Warehouse	Bin	Quantity	Dest Whse	Dest Bin	Unit Cost	Line Cost
1458-96323	K147 Kyocera Colour Copier	AMB0001	Intransit Warehouse	Intransit	1	George Warehouse	George_Bin	4 800.00	4 800.00
147-888741	K147 Yellow Toner	AB100200	Intransit Warehouse	Intransit	1	George Warehouse	George_2_Bin	450.00	450.00

George Warehouse

<b>Total</b>	ZAR	<b>5 250.00</b>
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Authorisation Signature \_\_\_\_\_ Date \_\_\_\_\_ Time \_\_\_\_\_

Report created on BPO - www.co3.co.za Printed: 20 Nov 2018 11:25 Page 1 of 1

- You will return to the **Parts Intransit** screen, where you can see the items selected for transfer have now been **removed** from this screen.

Parts Intransit - BPO: Version 2.1.0.68 - Example Company

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

Save Layout | Workspaces | Receive | Durban | Refresh

Format | Pro... | Current

Drag a column header here to group by that column.

DocNo	DocType	PartType	PartCode	PartDesc	WarehouseName	BinLocationName	BatchSerialNo	AverageUnitCost	Quantity

Open Windows | 20 Nov 2018

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