

We are currently updating our site; thank you for your patience.

## INVENTORY

### PART REQUESTS – TRANSFER – DIRECT

The **Direct Transfer** process is used when stock is required at branches and is requested from head office. If the source branch does not have stock to issue, complete the [stock procurement process](#) before transferring the stock. Head office will then complete the transfer to the branch.

In the **Direct Transfer** process, item(s) will be transferred from the original warehouse location directly to the final warehouse destination.

For example, a branch (**Site**) in KwaZulu-Natal may have short stock of a copier machine model required by a customer. Upon checking the system, (Stock Status), the stock or store manager can see there is stock of that particular copier at another branch (**Site**). Instead of [raising a purchase requisition](#) for the copier, the branch or store manager can request a transfer of that item to fulfil his customer requirements.

An [Inter Warehouse Transfer Request](#) should be raised first as this will create the Warehouse (**WHSE**) originated part request. You can raise a part request directly from the **Part Requests for the Site** listing screen, but as you cannot see whether there is stock available for transfer, it is advisable to begin the process by [raising the request](#) from the **Stock Status** screen.

If the source branch does not have stock to issue, complete the [stock procurement process](#) before transferring the stock.

**Ribbon** Select **Inventory > Part Requests**



- The **Part Requests for the Site** screen will display.
- The **Site** must be set to the **Site location** of the **source warehouse** for the **Direct Transfer** process.

For a detailed handling of this topic refer to [Site Selection](#).

- The **State** filter will default to '**All States**' upon opening.

For a detailed handling of this topic refer to [State/Type Selection](#).

- The list of **part requests** displayed will be dependant on the **Site** and **State** selected.

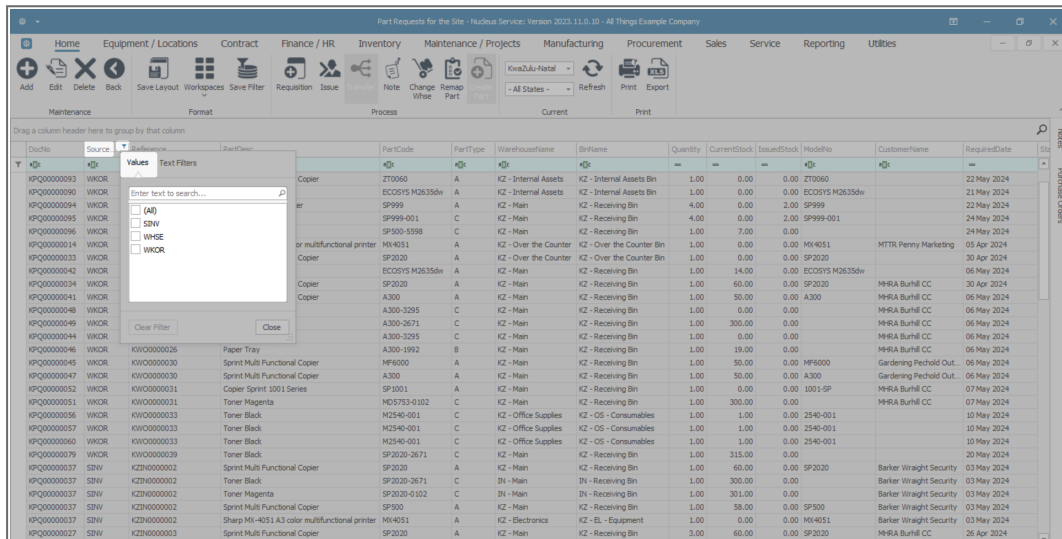
Date	Source Type	Reference	Part Desc	Part Code	Part Type	Warehouse Name	Bin Name	Quantity	Current Stock	In Stock	Hold %/H	Customer Name	Request Date
KPQ0000093	WKOR	KW00000941	Sprint Multi Functional Copier	Z7060	A	K2 - Internal Assets	K2 - Internal Assets Bin	1.00	0.00	0.00	Z7060		22 May 2024
KPQ0000090	WKOR	KW0000042	Kyocera Digital Printer	ECOSYS M2635dw	A	K2 - Internal Assets	K2 - Internal Assets Bin	1.00	0.00	0.00	ECOSYS M2635dw		21 May 2024
KPQ0000094	WKOR	KW0000043	SP Multi Function Printer	SP999	A	K2 - Main	K2 - Receiving Bin	4.00	0.00	2.00	SP999		22 May 2024
KPQ0000095	WKOR	KW0000044	Toner Black	SP999-001	C	K2 - Main	K2 - Receiving Bin	4.00	0.00	2.00	SP999-001		24 May 2024
KPQ0000096	WKOR	KW0000044	Wiper Blade	SP500-5598	C	K2 - Main	K2 - Receiving Bin	1.00	7.00	0.00			24 May 2024
KPQ0000014	WKOR	KW0000005	Sharp MX-451 A3 color multifunctional printer	MX451	A	K2 - Over the Counter	K2 - Over the Counter Bin	1.00	0.00	0.00	MX451	MTR Penny Marketing	03 Apr 2024
KPQ0000033	WKOR	KW0000011	Sprint Multi Functional Copier	SP2020	A	K2 - Over the Counter	K2 - Over the Counter Bin	1.00	0.00	0.00	SP2020		30 Apr 2024
KPQ0000042	WKOR	KW0000015	Kyocera Digital Printer	ECOSYS M2635dw	A	K2 - Main	K2 - Receiving Bin	1.00	14.00	0.00	ECOSYS M2635dw		06 May 2024
KPQ0000034	WKOR	KW0000019	Sprint Multi Functional Copier	SP2020	A	K2 - Main	K2 - Receiving Bin	1.00	60.00	0.00	SP2020	MIRA Burhill CC	30 Apr 2024
KPQ0000041	WKOR	KW0000019	Sprint Multi Functional Copier	A300	A	K2 - Main	K2 - Receiving Bin	1.00	50.00	0.00	A300	MIRA Burhill CC	06 May 2024
KPQ0000048	WKOR	KW0000023	Fuser Cleaning Web	A300-3295	C	K2 - Main	K2 - Receiving Bin	1.00	0.00	0.00		MIRA Burhill CC	06 May 2024
KPQ0000049	WKOR	KW0000023	Toner Black	A300-2671	C	K2 - Main	K2 - Receiving Bin	1.00	300.00	0.00		MIRA Burhill CC	06 May 2024
KPQ0000044	WKOR	KW0000023	Fuser Cleaning Web	A300-3295	C	K2 - Main	K2 - Receiving Bin	1.00	0.00	0.00		MIRA Burhill CC	06 May 2024
KPQ0000046	WKOR	KW0000026	Paper Tray	A300-1992	B	K2 - Main	K2 - Receiving Bin	1.00	19.00	0.00		MIRA Burhill CC	06 May 2024
KPQ0000045	WKOR	KW0000030	Sprint Multi Functional Copier	MF6000	A	K2 - Main	K2 - Receiving Bin	1.00	50.00	0.00	MF6000	Gardening Pechold Out.	06 May 2024
KPQ0000047	WKOR	KW0000030	Sprint Multi Functional Copier	A300	A	K2 - Main	K2 - Receiving Bin	1.00	50.00	0.00	A300	Gardening Pechold Out.	06 May 2024
KPQ0000052	WKOR	KW0000031	Copier Sprint 2011 Series	SP2020	A	K2 - Main	K2 - Receiving Bin	1.00	0.00	0.00	1001/SP	MIRA Burhill CC	07 May 2024
KPQ0000051	WKOR	KW0000031	Toner Magenta	ND5753-0102	C	K2 - Main	K2 - Receiving Bin	1.00	300.00	0.00		MIRA Burhill CC	07 May 2024
KPQ0000056	WKOR	KW0000033	Toner Black	M2540-001	C	K2 - Office Supplies	K2 - OS - Consumables	1.00	1.00	0.00	M2540-001		10 May 2024
KPQ0000057	WKOR	KW0000033	Toner Black	M2540-001	C	K2 - Office Supplies	K2 - OS - Consumables	1.00	1.00	0.00	M2540-001		10 May 2024
KPQ0000060	WKOR	KW0000033	Toner Black	M2540-001	C	K2 - Office Supplies	K2 - OS - Consumables	1.00	1.00	0.00	M2540-001		10 May 2024
KPQ0000079	WKOR	KW0000079	Toner Black	SP2020-2671	C	K2 - Main	K2 - Receiving Bin	1.00	315.00	0.00			20 May 2024
KPQ0000037	SNV	KZIN000002	Sprint Multi Functional Copier	SP2020	A	K2 - Main	K2 - Receiving Bin	1.00	60.00	0.00	SP2020	Banker Wright Security	03 May 2024
KPQ0000037	SNV	KZIN000002	Toner Black	SP2020-2671	C	IN - Main	IN - Receiving Bin	1.00	300.00	0.00		Banker Wright Security	03 May 2024
KPQ0000037	SNV	KZIN000002	Toner Magenta	SP2020-0102	C	IN - Main	IN - Receiving Bin	1.00	301.00	0.00		Banker Wright Security	03 May 2024
KPQ0000037	SNV	KZIN000002	Sprint Multi Functional Copier	SP500	A	K2 - Main	K2 - Receiving Bin	1.00	58.00	0.00	SP500	Banker Wright Security	03 May 2024
KPQ0000037	SNV	KZIN000002	Sharp MX-451 A3 color multifunctional printer	MX451	A	K2 - Electronics	K2 - EL - Equipment	1.00	0.00	0.00	MX451	Banker Wright Security	03 May 2024
KPQ0000037	SNV	KZIN000003	Sprint Multi Functional Copier	SP2020	A	K2 - Main	K2 - Receiving Bin	3.00	60.00	0.00	SP2020	MIRA Burhill CC	26 Apr 2024

## SEARCH FOR WHSE PART REQUEST

To make it easier to find a specific part request originating from a warehouse (**WHSE**), you can use the [Auto Filter Row](#) or the [Filter Icon](#). In this example,

we will filter by the **Source Type** column to search for part requests originating from a warehouse: **WHSE**.

- Note that the data grid currently displays all **Source Types**.
- Hover over the column header **Source Types** to reveal the **filter icon**.
- Click on the icon to open the **Filter pop-up screen**.
- Ensure that the **Values** tab is selected.



- Select the **WHSE** check box.
- As the check box is selected, the data grid will sort and refresh, to display only the part requests that have the **Source Type: WHSE**.
- The applied filter will be displayed in the data grid **Title bar**.
- The applied filter will also be displayed in the **Auto Filter Row** and the **Edit Filter row**.
- **Close** the Filter pop-up screen.

Applied Filter : [SourceType] = 'WHSE'

PartCode	PartType	WarehouseName	BinName	Quantity	CurrentStock	IssuedStock	ModDate	CustomerName	RequiredDate
SP2020-2671	C	KZ - Main	KZ - Receiving Bin	1.00	314.00	0.00			30 May 2024
SP2020-1992	B	KZ - Main	KZ - Receiving Bin	1.00	19.00	0.00			30 May 2024
SP2020	A	KZ - Main	KZ - Receiving Bin	1.00	54.00	0.00	SP2020		30 May 2024
E29352-2671	C	KZ - Main	KZ - Receiving Bin	1.00	300.00	0.00			30 May 2024
E29352-1992	B	KZ - Main	KZ - Receiving Bin	1.00	20.00	0.00			30 May 2024
E29352	A	KZ - Main	KZ - Receiving Bin	1.00	50.00	0.00	E29352		30 May 2024
A990-1992	B	KZ - Main	KZ - Receiving Bin	1.00	20.00	0.00			27 May 2024
A990	A	KZ - Main	KZ - Receiving Bin	1.00	52.00	0.00	A990		27 May 2024
SP2020-4933	C	KZ - Main	KZ - Receiving Bin	1.00	180.00	0.00			27 May 2024
SP2020-1992	B	KZ - Main	KZ - Receiving Bin	1.00	19.00	0.00			27 May 2024
A300	A	KZ - Main	KZ - Receiving Bin	1.00	50.00	0.00	A300		27 May 2024
SP2020-2671	C	KZ - Main	KZ - Receiving Bin	2.00	314.00	0.00			16 May 2024
MX4051	A	KZ - Main	KZ - Receiving Bin	2.00	6.00	0.00	MX4051		08 May 2024
ECOSYS M2635dw	A	KZ - Main	KZ - Receiving Bin	2.00	11.00	0.00	ECOSYS M2635dw		08 May 2024
M2540-604	C	KZ - Main	KZ - Receiving Bin	2.00	0.00	0.00	M2540-604		08 May 2024
M5000P-6276	C	KZ - Main	KZ - Receiving Bin	2.00	0.00	0.00	M5000P-6276		08 May 2024
SP2020-2671	C	KZ - Main	KZ - Receiving Bin	1.00	314.00	0.00			06 May 2024
SP2020-3671	B	KZ - Main	KZ - Receiving Bin	1.00	50.00	0.00			06 May 2024
SP2020-1992	B	KZ - Main	KZ - Receiving Bin	1.00	19.00	0.00			06 May 2024
SP2020	A	KZ - Main	KZ - Receiving Bin	1.00	54.00	0.00	SP2020		06 May 2024
TT5550	A	KZ - Electronics	KZ - EL - Electronics	2.00	0.00	0.00	TT5550		06 May 2024
SP2020-5598	C	KZ - Main	KZ - Receiving Bin	5.00	5.00	0.00			26 Apr 2024
SP2020-0102	C	KZ - Electronics	KZ - EL - Electronics	1.00	0.00	0.00			22 Apr 2024
SP2020-2671	C	KZ - Electronics	KZ - EL - Electronics	1.00	0.00	0.00			22 Apr 2024
SP2020-7652	C	KZ - Electronics	KZ - EL - Electronics	1.00	0.00	0.00			22 Apr 2024

## SELECT PART REQUEST TO TRANSFER

- Select the **row** of the Inter Warehouse Transfer Part Request that was originally raised.

## NOTE ON MULTIPLE ITEMS LINKED TO A PART REQUEST

- Although only one item row is selected, you will note that there are **3** items linked to the same part request. All items linked to the selected part request row will pull through to the **Stock Transfer** screen shown in the next step.
- Click on **Transfer**.

Part Requests for the Site - Nucleus Services: Version 2023.11.0.10 - All Things Example Company

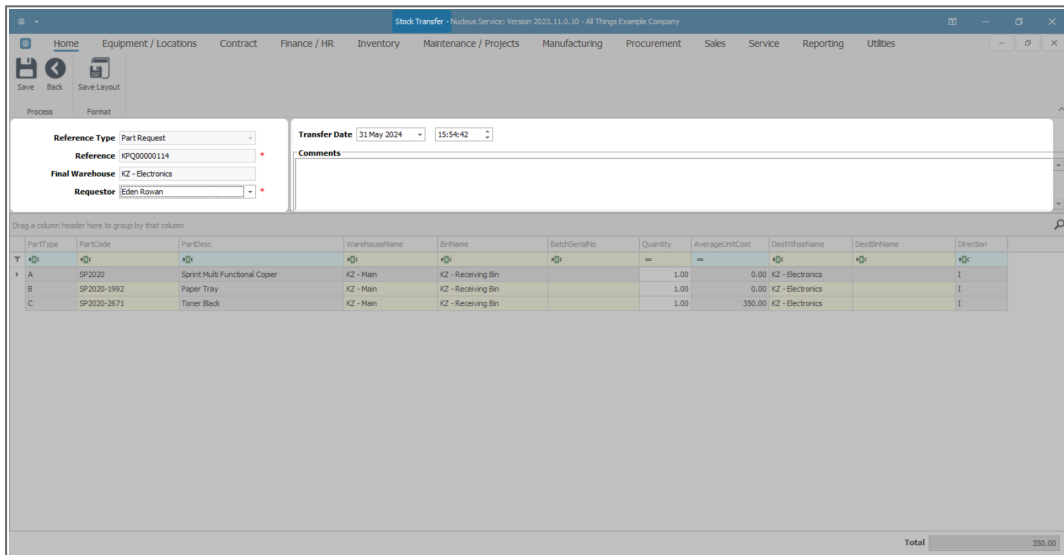
Applied Filter : [SourceType] = 'WHSE'

DocNo	Source	Reference	PartDesc	PartCode	PartType	WarehouseName	BinName	Quantity	CurrentStock	IssuedStock	ModDate	CustomerName	RequiredDate
KPQ00000114	WHSE	KZ - Electronics	Toner Black	SP2020-2671	C	KZ - Main	KZ - Receiving Bn	1.00	314.00	0.00			30 May 2024
KPQ00000114	WHSE	KZ - Electronics	Paper Tray	SP2020-1992	B	KZ - Main	KZ - Receiving Bn	1.00	19.00	0.00			30 May 2024
KPQ00000114	WHSE	KZ - Electronics	Sprint Multi Functional Copier	SP2020	A	KZ - Main	KZ - Receiving Bn	1.00	54.00	0.00	SP2020		30 May 2024
KPQ00000113	WHSE	KZ - Construction	Toner Black	B29352-2671	C	KZ - Main	KZ - Receiving Bn	1.00	300.00	0.00			30 May 2024
KPQ00000113	WHSE	KZ - Construction	Paper Tray	B29352-1992	B	KZ - Main	KZ - Receiving Bn	1.00	20.00	0.00			30 May 2024
KPQ00000113	WHSE	KZ - Construction	Sprint Multi Functional Copier	B29352	A	KZ - Main	KZ - Receiving Bn	1.00	50.00	0.00	B29352		30 May 2024
KPQ00000100	WHSE	KZ - Over the Counter	Paper Tray	A990-1992	B	KZ - Main	KZ - Receiving Bn	1.00	20.00	0.00			27 May 2024
KPQ00000100	WHSE	KZ - Over the Counter	Sprint Multi Functional Copier	A990	A	KZ - Main	KZ - Receiving Bn	1.00	52.00	0.00	A990		27 May 2024
KPQ00000099	WHSE	KZ - Over the Counter	Paper Pickup Roller	SP2020-4933	C	KZ - Main	KZ - Receiving Bn	1.00	180.00	0.00			27 May 2024
KPQ00000099	WHSE	KZ - Over the Counter	Paper Tray	SP2020-1992	B	KZ - Main	KZ - Receiving Bn	1.00	19.00	0.00			27 May 2024
KPQ00000098	WHSE	KZ - Over the Counter	Sprint Multi Functional Copier	A300	A	KZ - Main	KZ - Receiving Bn	1.00	50.00	0.00	A300		27 May 2024
KPQ00000069	WHSE	KZ - Over the Counter	Toner Black	SP2020-2671	C	KZ - Main	KZ - Receiving Bn	2.00	314.00	0.00			16 May 2024
KPQ00000053	WHSE	KZ - Electronics	Sharp MX-4051 A3 color multifunctional printer	MX4051	A	KZ - Main	KZ - Receiving Bn	2.00	6.00	0.00	MX4051		08 May 2024
KPQ00000053	WHSE	KZ - Electronics	Kyocera Digital Printer	ECOSYS M2635dw	A	KZ - Main	KZ - Receiving Bn	2.00	11.00	0.00	ECOSYS M2635dw		08 May 2024
KPQ00000053	WHSE	KZ - Electronics	Toner Magenta	M2540-604	C	KZ - Main	KZ - Receiving Bn	2.00	0.00	0.00	M2540-604		08 May 2024
KPQ00000053	WHSE	KZ - Electronics	Toner Yellow	M5000P-6276	C	KZ - Main	KZ - Receiving Bn	2.00	0.00	0.00	M5000P6276		08 May 2024
KPQ00000040	WHSE	KZ - Over the Counter	Toner Black	SP2020-2671	C	KZ - Main	KZ - Receiving Bn	1.00	314.00	0.00			06 May 2024
KPQ00000040	WHSE	KZ - Over the Counter	Staple Unit	SP2020-3671	B	KZ - Main	KZ - Receiving Bn	1.00	50.00	0.00			06 May 2024
KPQ00000040	WHSE	KZ - Over the Counter	Paper Tray	SP2020-1992	B	KZ - Main	KZ - Receiving Bn	1.00	19.00	0.00			06 May 2024
KPQ00000040	WHSE	KZ - Over the Counter	Sprint Multi Functional Copier	SP2020	A	KZ - Main	KZ - Receiving Bn	1.00	54.00	0.00	SP2020		06 May 2024
KPQ00000038	WHSE	KZ - Main	Sprint Multi Functional Copier	TT5550	A	KZ - Electronics	KZ - EL - Electronics	2.00	0.00	0.00	TT5550		06 May 2024
KPQ00000026	WHSE	KZ - Over the Counter	Wipe Blade	SP2020-5598	C	KZ - Main	KZ - Receiving Bn	5.00	5.00	0.00			26 Apr 2024
KPQ00000023	WHSE	KZ - Over the Counter	Toner Magenta	SP2020-0102	C	KZ - Electronics	KZ - EL - Electronics	1.00	0.00	0.00			22 Apr 2024
KPQ00000023	WHSE	KZ - Over the Counter	Toner Black	SP2020-2671	C	KZ - Electronics	KZ - EL - Electronics	1.00	0.00	0.00			22 Apr 2024
KPQ00000023	WHSE	KZ - Over the Counter	Maintenance Kit	SP2020-7652	C	KZ - Electronics	KZ - EL - Electronics	1.00	0.00	0.00			22 Apr 2024

## STOCK TRANSFER DETAILS

- The **Stock Transfer** screen will open.
- Note the following details:
  - **Reference Type:** This will auto populate with Part Request.
  - **Reference:** This will auto populate with the Part Request number.
  - **Final Warehouse:** This will auto populate with the name of the final destination warehouse which is receiving the stock transfer.
    - As this is the Direct Transfer process, this warehouse will be the same as the DestWhseName.
  - **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 if required.

- **Transfer Date:** This will auto populate with the current date and time.
  - Click on the drop-down arrow and use the calendar function to select an alternative date, if required.
  - Either type in or use the directional arrows to select an alternative time, if required.
- **Comments:** Click in the Comments text box and type in a comment relevant to this stock transfer, if required. You will see that this will come through on the printed Transfer Note further in this manual.



The screenshot shows the 'Stock Transfer' form in a software application. The form includes the following fields:

- Reference Type:** Part Request
- Reference:** KPQ0000114
- Final Warehouse:** KZ - Electronics
- Requestor:** Eden Rowan
- Transfer Date:** 31 May 2024 15:54:42
- Comments:** (Empty text box)

Below the form is a data grid with the following columns: PartType, PartCode, PartDesc, WarehouseName, BinName, BatchSerialNo, Quantity, AverageUnitCost, DestWarehouseName, DestBinName, and Direction. The grid contains three rows of data:

PartType	PartCode	PartDesc	WarehouseName	BinName	BatchSerialNo	Quantity	AverageUnitCost	DestWarehouseName	DestBinName	Direction
A	SP2020	Sprint Multi Functional Copier	KZ - Main	KZ - Receiving Bin		1.00	0.00	KZ - Electronics		I
B	SP2020-1992	Paper Tray	KZ - Main	KZ - Receiving Bin		1.00	0.00	KZ - Electronics		I
C	SP2020-2671	Toner Black	KZ - Main	KZ - Receiving Bin		1.00	350.00	KZ - Electronics		I

A 'Total' row at the bottom right shows a value of 350.00.

## THE PARTS DATA GRID

- You will see that all the items linked to the selected part request have auto populated the data grid.
- The **DestinationWarehouseName** and **DestinationBinName** columns will auto populate with the name of the warehouse that requested the transfer and which will be receiving the items.



**Note:** This differs from the [In-transit Transfer](#) process, where the Destination Warehouse Name and Bin Name auto populate with the In-transit details set up in your [company configuration](#).

- If the Bin Name field is empty, it may have been omitted when raising the [Interwarehouse Request](#) and the [Destination Bin](#) can be selected further on in this process.
- The **WarehouseName** and **BinName** columns will auto populate with the Source Warehouse Name and Bin Name on the original part request.
- The **Quantity** column will auto populate with the quantity required on the original part request.

The screenshot shows the 'Stock Transfer' application interface. The top navigation bar includes: Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, Utilities. The main form area contains:

- Reference Type:** Part Request
- Reference:** HPQ00001114
- Final Warehouse:** K2 - Electronics
- Requestor:** Eden Rowan
- Transfer Date:** 31 May 2024 15:54:42
- Comments:** Telephone communication before delivery.

Below the form is a table with the following columns: PartType, PartCode, PartDesc, WarehouseName, BinName, BatchSerialNo, Quantity, AverageUnitCost, DestWarehouseName, DestBinName, Direction. The table contains three rows of data:

PartType	PartCode	PartDesc	WarehouseName	BinName	BatchSerialNo	Quantity	AverageUnitCost	DestWarehouseName	DestBinName	Direction
A	SP2020	Sprint Multi Functional Copier	K2 - Main	K2 - Receiving Bin		1.00	0.00	K2 - Electronics		I
B	SP2020-1992	Paper Tray	K2 - Main	K2 - Receiving Bin		1.00	0.00	K2 - Electronics		I
C	SP2020-2671	Toner Black	K2 - Main	K2 - Receiving Bin		1.00	350.00	K2 - Electronics		I

A 'Total' row at the bottom right shows a value of 350.00.

## NOTE ON A OR B-CLASS TRANSFER ITEMS

- **A** or **B**-Class items will not reflect an **AverageUnitCost** in this field as each **A** or **B**-Class item has to have their specific Serial Number manually selected by the person initiating the transfer.

- Each serialised item could have a different unit cost. The process to select an **A** or **B**-Class serialised item is set out below.

### **NOTE ON C-CLASS TRANSFER ITEMS**

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- For **C**-Class items, if the company is not using batch tracking then the **BatchSerialNo** field may be blank. Refer to [Batch tracking](#) for more information.
- The system auto selects from the first batch in the Source Warehouse and bin and populates the **Average Unit Cost**<sup>1</sup> field with the average unit cost of all the **C**-Class batch items in that bin.
- See further below to select the **BatchSerialNo** when Batch tracking is used.

**Note:** If the batch number is not recorded when the C-Class items are [received into store](#) and your company does not follow the [batch tracking](#) process, then the **BatchSerialNo** field of this C-Class item will be blank. However, the system will still calculate the **AverageUnitCost** of all the batch items in the bin, both the numbered and the unnumbered batches.

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<sup>1</sup>[Average Total Cost = Total Cost of Production / Quantity of Units Produced] Average cost includes fixed costs, like those necessary for production, that remain the same no matter the output. An example of a fixed cost is the building space and equipment used to assemble a product. Average cost also includes variable costs. Examples of variable costs are specific parts needed to build a product, which may increase or decrease according to output. To assign a value to inventory, calculate the cost of goods available for sale, divided by the number of units available for sale.



Stock Transfer - Nucleus Service: Version 2023.11.0.10 - All Things Example Company

Reference Type: Part Request  
 Reference: KPQ0000114  
 Final Warehouse: KZ - Electronics  
 Requestor: Eden Rowan

Transfer Date: 31 May 2024 15:54:42  
 Comments: Telephone communication before delivery.

PartType	PartCode	PartDesc	WarehouseName	BinName	BatchSerialNo	Quantity	AverageUnitCost	DestWarehouseName	DestBinName	Direction
A	SP2020	Sprint Multi Functional Copier	KZ - Main	KZ - Receiving Bin		1.00	0.00	KZ - Electronics		I
B	SP2020-1992	Paper Tray	KZ - Main	KZ - Receiving Bin		1.00	0.00	KZ - Electronics		I
C	SP2020-2671	Toner Black	KZ - Main	KZ - Receiving Bin		1.00	350.00	KZ - Electronics		I

Total: 350.00

## VIEW STOCK AVAILABLE FOR TRANSFER

You can view **how much stock** of the requested item is in the source warehouse and bin.

### View A-Class Stock

- **Right-click** anywhere in the **row** of the **A-Class** item you wish to view.
- An **All groups** menu will pop up.
- Click on **View - View Stock**.

Stock Transfer - Nucleus Service: Version 2023.11.0.10 - All Things Example Company

Reference Type: Part Request  
 Reference: KPQ0000114  
 Final Warehouse: KZ - Electronics  
 Requestor: Eden Rowan

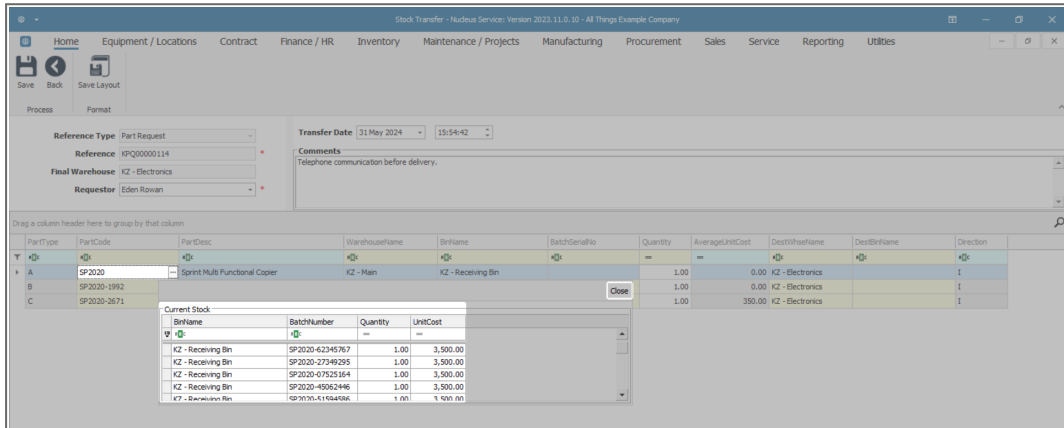
Transfer Date: 31 May 2024 15:54:42  
 Comments: Telephone communication before delivery.

PartType	PartCode	PartDesc	WarehouseName	BinName	BatchSerialNo	Quantity	AverageUnitCost	DestWarehouseName	DestBinName	Direction
A	SP2020	Sprint Multi Functional Copier	KZ - Main	KZ - Receiving Bin		1.00	0.00	KZ - Electronics		I
B	SP2020-1992	Paper Tray	KZ - Main	KZ - Receiving Bin		1.00	0.00	KZ - Electronics		I
C	SP2020-2671	Toner Black	KZ - Main	KZ - Receiving Bin		1.00	350.00	KZ - Electronics		I

Context menu for Row A:

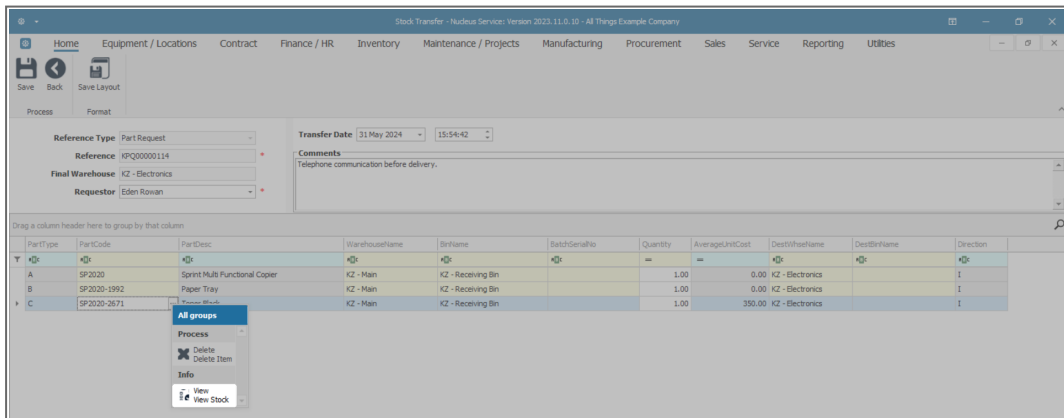
- All groups
- Process
- Delete Item
- Delete Item
- Info
- View Stock

- The **Current Stock** sub grid will pop up.
- Here you can view a list of **all** the **A-Class** items available in **all** bins linked to the **source warehouse**.
- Note that each **A-Class** item is listed on a separate line, each with it's own unique **BatchSerialNo** and **UnitCost**.
- **Close** the sub grid when you are done.

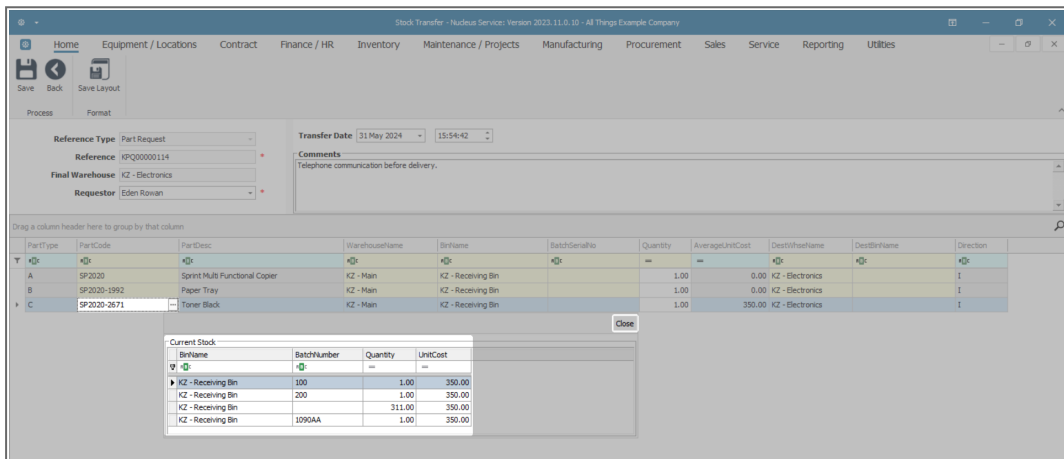


## View C-Class Stock

- **Right-click** anywhere in the **row** of the **C-Class** item you wish to view.
- An **All groups** menu will pop up.
- Click on **View - View Stock**.

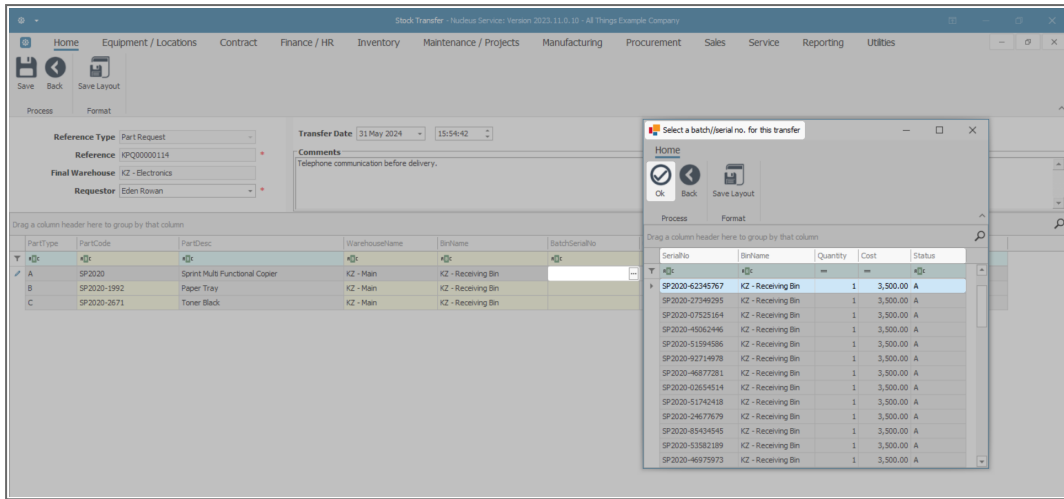


- The **Current Stock** sub grid will pop up.
- Here you can view a list of **all the batches** of **C-Class** items available in **all bins** linked to the **source warehouse**.
- Note that the **Quantity** of each batch varies as more than one **C-Class** item can be received into a batch.
- The **UnitCost** will also vary according to the average unit cost of all the **C-Class** batch items grouped together within that bin.
- **Close** the sub grid when you are done.

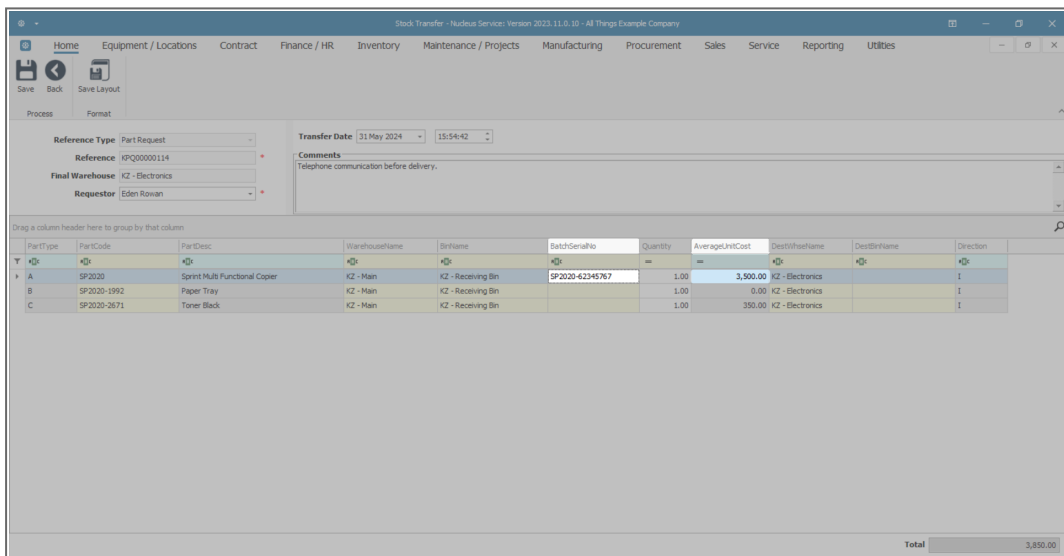


## A-CLASS ITEMS BATCH SERIAL NO SELECTION

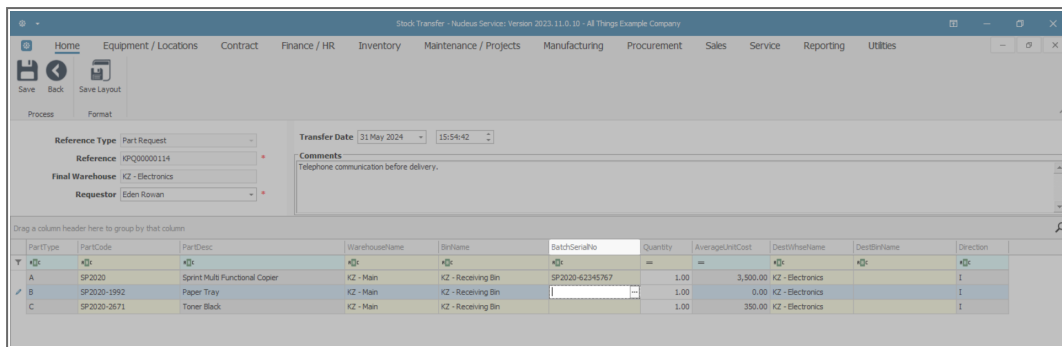
- Click in the **BatchSerialNo** field of the **A-Class** item.
- An **ellipsis** button will be revealed.
- Click on this button to display the **Select a batch//serial no. for this transfer** pop up screen.
- This screen will list all the serial numbers of this **A-Class** item that are currently stored in the selected warehouse and bin.
- Select the **row** of the **batch/serial number** for the **A-Class** transfer item.
- Click on **Ok**.



- The **BatchSerialNumber** field will populate according to your selection.
- The **AverageUnitCost** will populate according to the Average Unit Cost of this serialised **A-Class** item when it was GRN'd into store.



Follow the [A-Class Items BatchSerialNo Selection](#) process for the **B-Class** item(s) in the data grid.

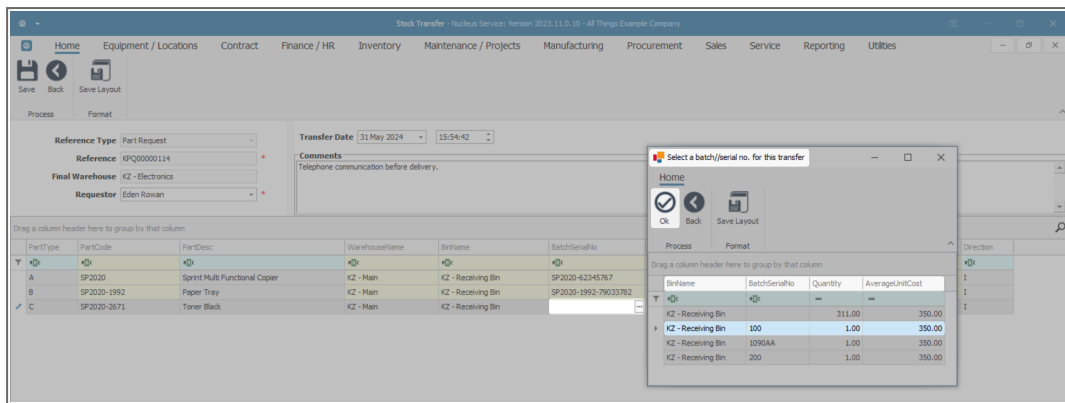


## C-CLASS ITEMS BATCHSERIALNO SELECTION

- Remember: For **C**-Class items, the system auto selects from the first batch in the Source Warehouse and bin and populates the **AverageUnitCost** field with the average unit cost of all the **C**-Class batch items in that bin.
- If the company is not using batch tracking then the **BatchSerialNumber** field may be blank.

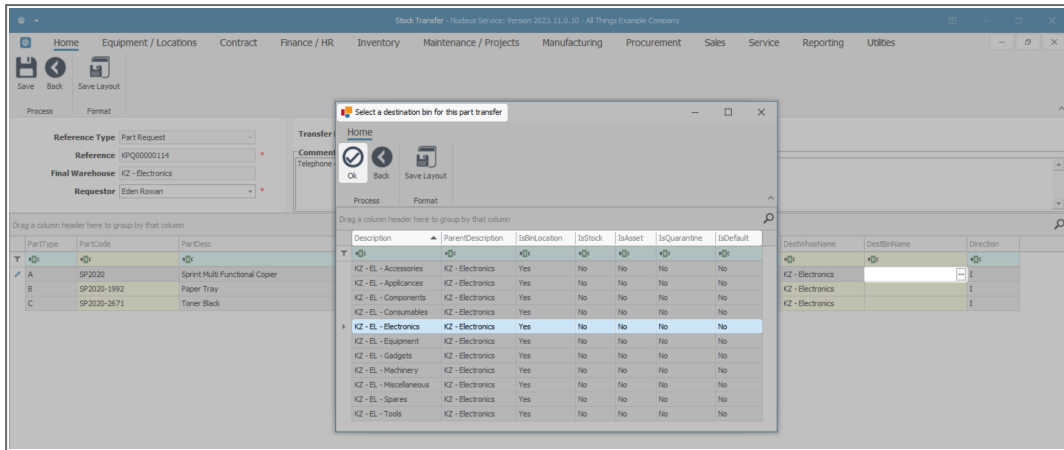
Follow this process to select the **BatchSerialNumber**.

- Click in the **BatchSerialNo** text box of the **C**-Class item to reveal an ellipsis button.
- Click on this button to display the **Select a batch//serial no. for this transfer** pop up screen.
- This screen will list **all** the batches available in the selected bin as well as the **Quantity** and **AverageUnitCost** of all the items in each bin.
- Select the **row** of the **batch/serial number** for the **C**-Class transfer item.
- Click on **Ok**.



## DESTINATION BIN SELECTION

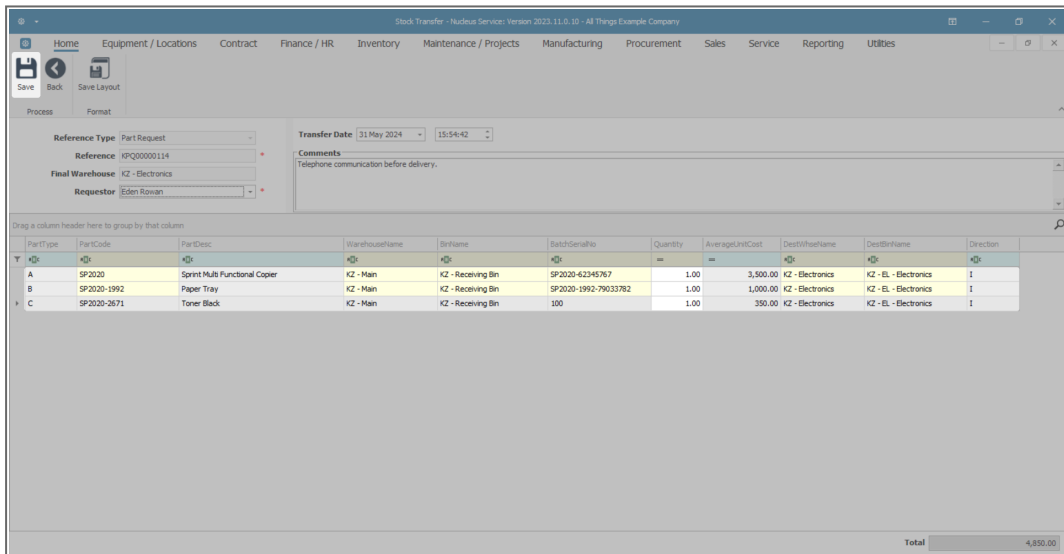
- If there are blank **DestBinName** fields, then follow this process to select these now, or the system will give an **error** message when trying to Save this Stock Transfer.
- Click in the **DestBinName** text box of the selected row to reveal the **ellipsis** button.
- Click on this button to display the **Select a destination bin for this part transfer** pop up screen.
- This screen will list **all** the bins linked to the **DestinationWarehouseName**.
- Select the **row** of the **bin** where the transfer items are to be received.
- Click on **Ok**.



- Repeat the process until all the **DestBinName** fields are populated.

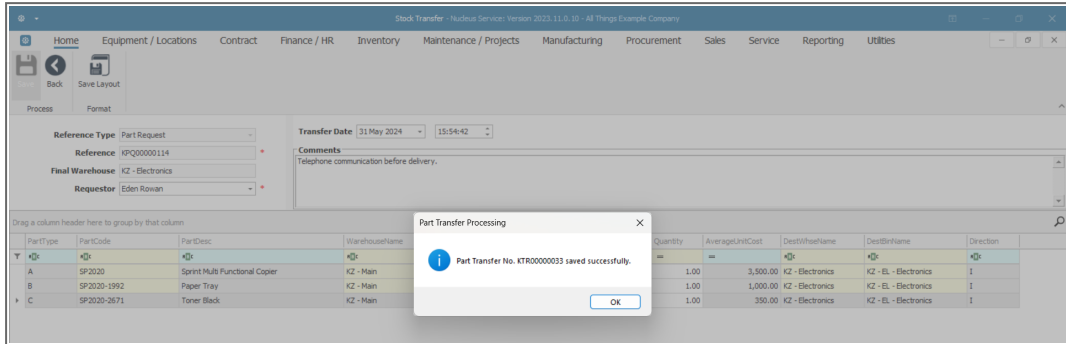
## SAVE STOCK TRANSFER DETAILS

- When you have finished completing the details for this direct Stock Transfer, click on **Save**.



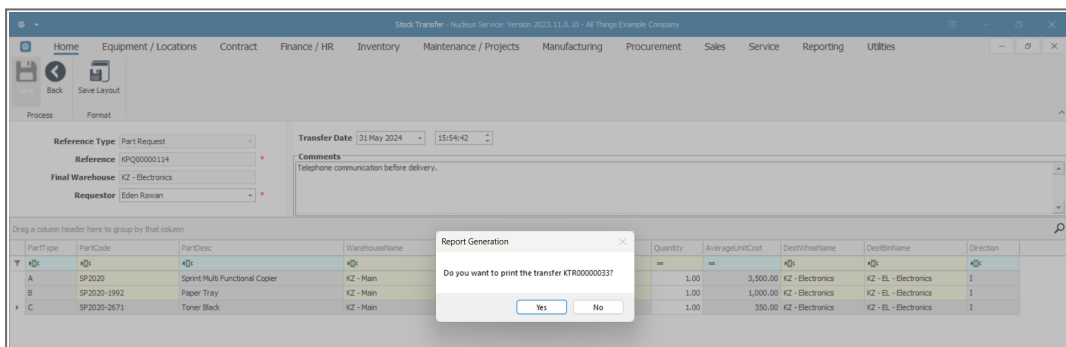
- A **Part Transfer Processing** message box will pop advising the following:

- Part Transfer No. [ ] saved successfully.
- Click on **OK**.



## PRINT TRANSFER NOTE

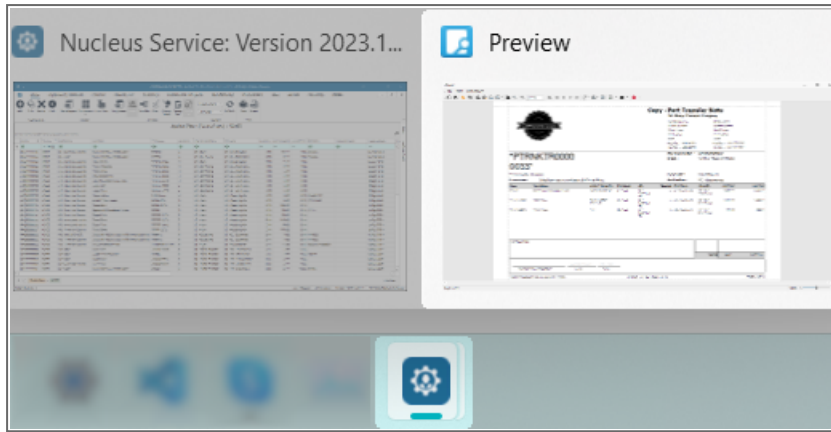
- A **Report Generation** message box will pop up asking;
  - Do you wish to print the transfer [ ]?
- Click on **Yes**.



## VIEW TRANSFER NOTE

- The **Preview** screen for the Part Transfer Note will open. If not, click on the Preview tab at the foot of your screen.





Note the following details:

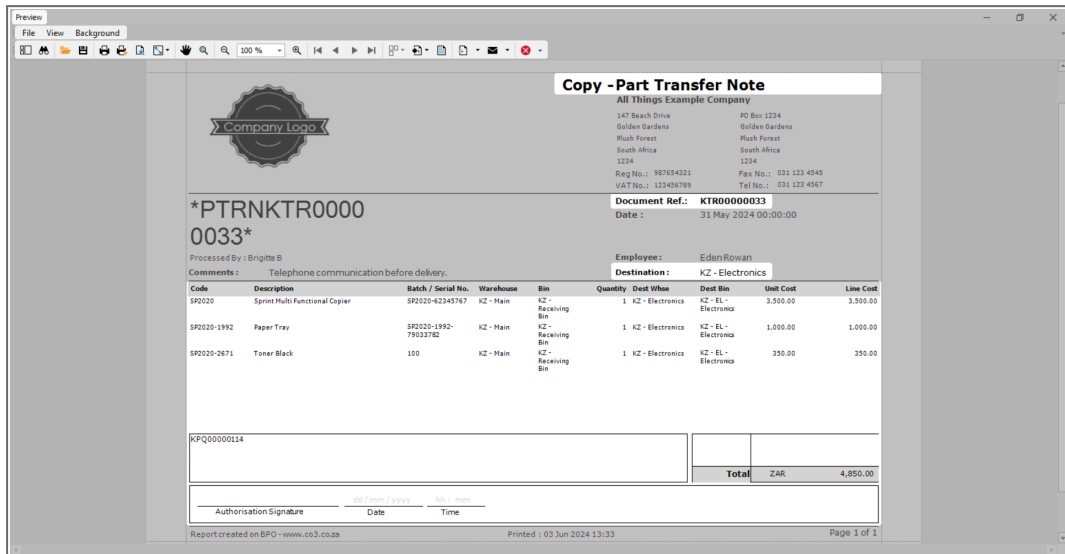
- The **Part Request No** is documented.
- The **BatchSerialNos** selected in the Stock Transfer screen are listed.
- The source **Warehouse** and **Bin** selected in the Stock Transfer screen are listed.
- The **Destination Warehouse** and **Destination Bin** are documented.
- The **Unit Cost**<sup>1</sup> and **Line Cost**<sup>2</sup> are figured.
- The **Total** cost of the transfer items is figured.
- There is a section on the document for an **Authorisation Signature, Date** and **Time**.
- The **Comment** typed into the Stock Transfer screen can be viewed here.

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<sup>1</sup>Generally, unit costs represent the total expense involved in creating one unit of a product or service. A unit cost forms the base level for a market offering price. A unit cost can be lowered through economies of scale.

<sup>2</sup>This is the amount due for the particular line item. Once you have entered the Unit Cost and Quantity, this figure will be calculated automatically. If you change either value at any time during creation of the invoice, the Line Total will adjust accordingly.

- From here you can use the **Preview** toolbar to **View**, **Edit** and **Publish** the document, as required.
- **Close** the Report Preview screen when you are finished.



- You will return to the **Part Requests for the Site** screen.
- Click **Back** or use the [Nucleus Service Open Windows Functionality](#) to return to the **Part Listing** screen to view the **Transfer** history.



**Note:** Only parts that are transferred from the **Source Warehouse and Bin** on the original part request are transferred and removed from the **Part Requests for the Site** listing screen.

DocNo	Source	Reference	PartDesc	PartCode	PartType	WarehouseName	BinName	Quantity	CurrentStock	IssuedStock	ModHilo	CustomerName	RequestDate
KPQ00000113	WHSE	KZ - Construction	Toner Black	B29352-2671	C	KZ - Main	KZ - Receiving Bn	1.00	300.00	0.00			30 May 2024
KPQ00000113	WHSE	KZ - Construction	Paper Tray	B29352-1992	B	KZ - Main	KZ - Receiving Bn	1.00	20.00	0.00			30 May 2024
KPQ00000113	WHSE	KZ - Construction	Sprint Multi Functional Copier	B29352	A	KZ - Main	KZ - Receiving Bn	1.00	50.00	0.00	B29352		30 May 2024
KPQ00000100	WHSE	KZ - Over the Counter	Paper Tray	A990-1992	B	KZ - Main	KZ - Receiving Bn	1.00	20.00	0.00			27 May 2024
KPQ00000100	WHSE	KZ - Over the Counter	Sprint Multi Functional Copier	A990	A	KZ - Main	KZ - Receiving Bn	1.00	52.00	0.00	A990		27 May 2024
KPQ00000099	WHSE	KZ - Over the Counter	Paper Pickup Roller	SP2020-4933	C	KZ - Main	KZ - Receiving Bn	1.00	180.00	0.00			27 May 2024
KPQ00000099	WHSE	KZ - Over the Counter	Paper Tray	SP2020-1992	B	KZ - Main	KZ - Receiving Bn	1.00	18.00	0.00			27 May 2024
KPQ00000099	WHSE	KZ - Over the Counter	Sprint Multi Functional Copier	A300	A	KZ - Main	KZ - Receiving Bn	1.00	50.00	0.00	A300		27 May 2024
KPQ00000069	WHSE	KZ - Over the Counter	Toner Black	SP2020-2671	C	KZ - Main	KZ - Receiving Bn	2.00	313.00	0.00			16 May 2024
KPQ00000053	WHSE	KZ - Electronics	Sharp MX-A51 A3 color multifunctional printer	M04651	A	KZ - Main	KZ - Receiving Bn	2.00	6.00	0.00	M04651		08 May 2024
KPQ00000053	WHSE	KZ - Electronics	Kyocera Digital Printer	EC2019 M3635dw	A	KZ - Main	KZ - Receiving Bn	2.00	11.00	0.00	EC2019 M3635dw		08 May 2024
KPQ00000053	WHSE	KZ - Electronics	Toner Magenta	M2540-004	C	KZ - Main	KZ - Receiving Bn	2.00	0.00	0.00	M2540-004		08 May 2024
KPQ00000053	WHSE	KZ - Electronics	Toner Yellow	M5000P-6276	C	KZ - Main	KZ - Receiving Bn	2.00	0.00	0.00	M5000P-6276		08 May 2024
KPQ00000040	WHSE	KZ - Over the Counter	Toner Black	SP2020-2671	C	KZ - Main	KZ - Receiving Bn	1.00	313.00	0.00			06 May 2024
KPQ00000040	WHSE	KZ - Over the Counter	Staple Unit	SP2020-3671	B	KZ - Main	KZ - Receiving Bn	1.00	50.00	0.00			06 May 2024
KPQ00000040	WHSE	KZ - Over the Counter	Paper Tray	SP2020-1992	B	KZ - Main	KZ - Receiving Bn	1.00	18.00	0.00			06 May 2024
KPQ00000040	WHSE	KZ - Over the Counter	Sprint Multi Functional Copier	SP2020	A	KZ - Main	KZ - Receiving Bn	1.00	53.00	0.00	SP2020		06 May 2024
KPQ00000038	WHSE	KZ - Main	Sprint Multi Functional Copier	TT5550	A	KZ - Electronics	KZ - EL - Electronics	2.00	0.00	0.00	TT5550		06 May 2024
KPQ00000026	WHSE	KZ - Over the Counter	Wiper Blade	SP2020-5598	C	KZ - Main	KZ - Receiving Bn	5.00	5.00	0.00			26 Apr 2024
KPQ00000023	WHSE	KZ - Over the Counter	Toner Magenta	SP2020-0102	C	KZ - Electronics	KZ - EL - Electronics	1.00	0.00	0.00			22 Apr 2024
KPQ00000023	WHSE	KZ - Over the Counter	Toner Black	SP2020-2671	C	KZ - Electronics	KZ - EL - Electronics	1.00	1.00	0.00			22 Apr 2024
KPQ00000023	WHSE	KZ - Over the Counter	Maintenance Kit	SP2020-7652	C	KZ - Electronics	KZ - EL - Electronics	1.00	0.00	0.00			22 Apr 2024
KPQ00000023	WHSE	KZ - Over the Counter	High Yield Reset Lever Gear	SP2020-6143	C	KZ - Electronics	KZ - EL - Electronics	1.00	0.00	0.00			22 Apr 2024
KPQ00000023	WHSE	KZ - Over the Counter	Fuser Unit	SP2020-7223	B	KZ - Electronics	KZ - EL - Electronics	1.00	0.00	0.00			22 Apr 2024
KPQ00000023	WHSE	KZ - Over the Counter	Paper Tray	SP2020-1992	B	KZ - Electronics	KZ - EL - Electronics	1.00	1.00	0.00			22 Apr 2024

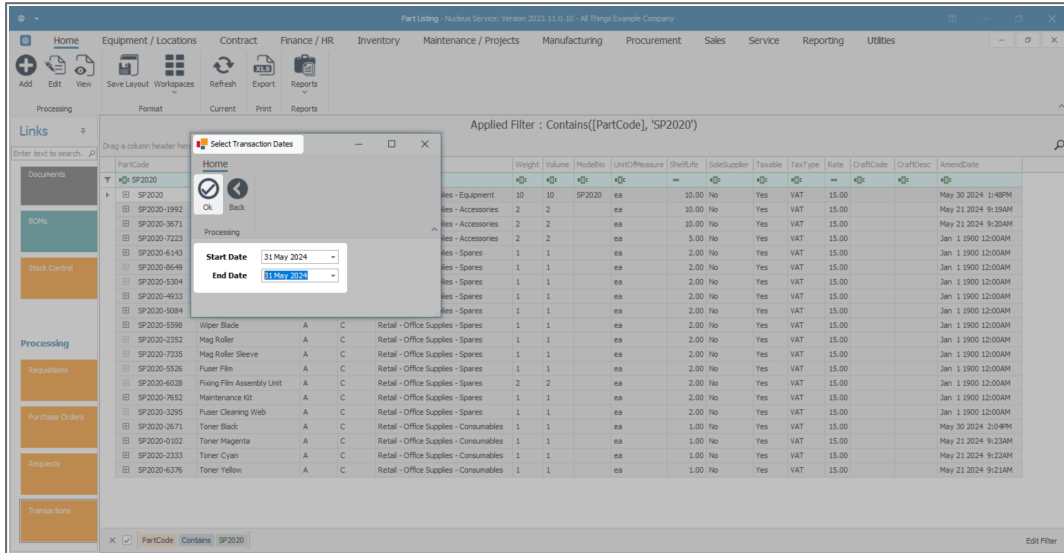
## VIEW PART REQUEST DIRECT TRANSFER

You can view the **Transfer** history in the **Parts Transactions** screen.

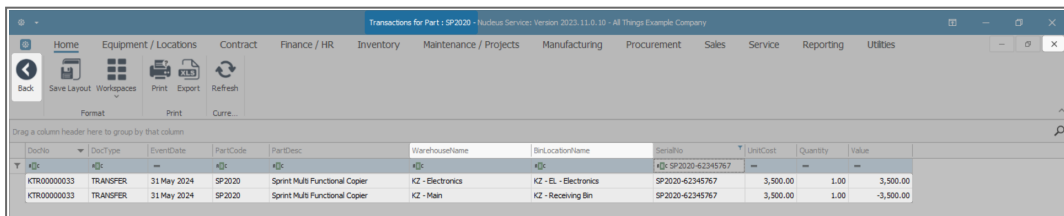
- The **Part Listing** screen will display.
- Use the **Auto Filter Row** to search for the part where you wish to view the part **Transfer** history.
- Select the **row** of the part.
- Click on the **Transactions** tile in the **Links** panel.

PartCode	Description	Status	PartType	CatDescription	Weight	Volume	ModelNo	UnitOfMeasure	ShelfLife	SoleSupplier	Taxable	TaxType	Rate	CraftCode	CraftDesc	AmendDate
SP2020	Sprint Multi Functional Copier	A	A	Retail - Office Supplies - Equipment	10	10	SP2020	ea	10.00	No	Yes	VAT	15.00			May 30 2024 1:48PM
SP2020-1992	Paper Tray	A	B	Retail - Office Supplies - Accessories	2	2		ea	10.00	No	Yes	VAT	15.00			May 21 2024 9:20AM
SP2020-3671	Staple Unit	A	B	Retail - Office Supplies - Accessories	2	2		ea	5.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP2020-7223	Fuser Unit	A	B	Retail - Office Supplies - Accessories	2	2		ea	2.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP2020-6143	High Yield Reset Lever Gear	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP2020-6649	Fuser Heat Roller	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP2020-5304	Fuser Roller Gear	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP2020-4933	Paper Pickup Roller	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP2020-5084	Picker Finger	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP2020-5598	Wiper Blade	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP2020-2352	Mag Roller	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP2020-7335	Mag Roller Sleeve	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP2020-5526	Fuser Film	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP2020-6028	Fixing Film Assembly Unit	A	C	Retail - Office Supplies - Spares	2	2		ea	2.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP2020-7652	Maintenance Kit	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP2020-3295	Fuser Cleaning Web	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
SP2020-2671	Toner Black	A	C	Retail - Office Supplies - Consumables	1	1		ea	1.00	No	Yes	VAT	15.00			May 30 2024 2:04PM
SP2020-0102	Toner Magenta	A	C	Retail - Office Supplies - Consumables	1	1		ea	1.00	No	Yes	VAT	15.00			May 21 2024 9:23AM
SP2020-2333	Toner Cyan	A	C	Retail - Office Supplies - Consumables	1	1		ea	1.00	No	Yes	VAT	15.00			May 21 2024 9:22AM
SP2020-6376	Toner Yellow	A	C	Retail - Office Supplies - Consumables	1	1		ea	1.00	No	Yes	VAT	15.00			May 21 2024 9:21AM

- A **Select Transaction Dates** screen will pop up.
- Select the range of dates that contain the **Transfer** history of the selected part code.
- Click on **Ok**.



- The **Transactions for Part [ ]** screen will open.
- If there are many item lines in the data grid, you can use the **Auto Filter Row** to help you search for the **Doc Transfer No** or **Part Serial No** of the **Direct Transfer**.
- The **original** warehouse and bin location and the **final** warehouse and bin destination will be shown on separate lines in the data grid.
- You can view the **Transfer** history for each part code by following this process.
- Click on **Back** or **Close** the screen when you are done.



## Related Topics

[Part Requests - Transfer - Direct](#)

[Part Requests - Transfer - In-transit](#)

[Part Requests - Transfer - Edit Transfer Quantity](#)

[Part Requests - Transfer - Delete Item from Transfer](#)

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