INVENTORY

STOCK – STOCK TRANSFER

This option is used by company's who have various sites set up, and will often move goods from one site to an '**in-transit**' location, on the way to another site.

Stock in this location cannot be issued until it is received into the **destination** warehouse.

Two stock transfer transactions occur during this process:

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

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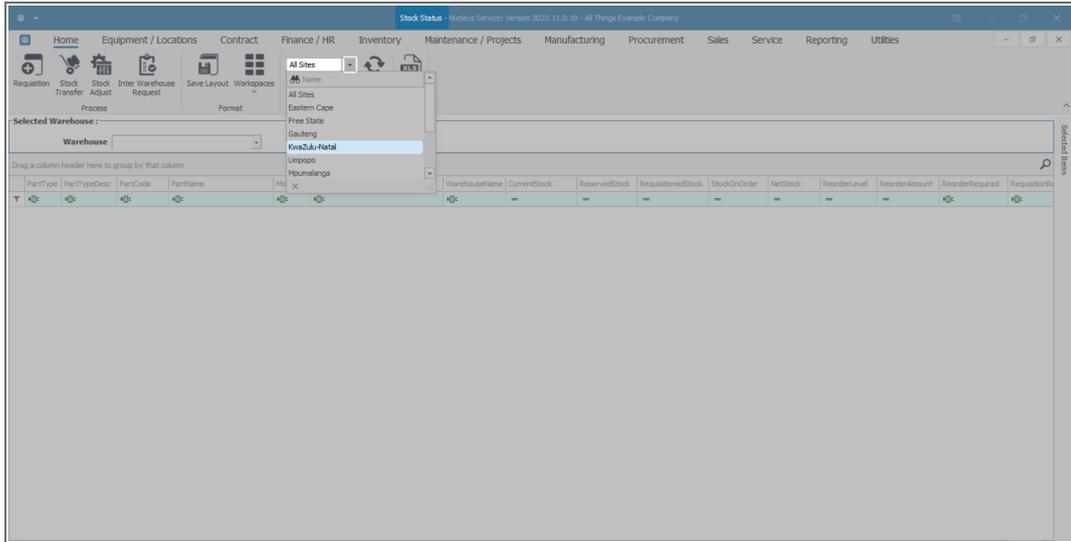
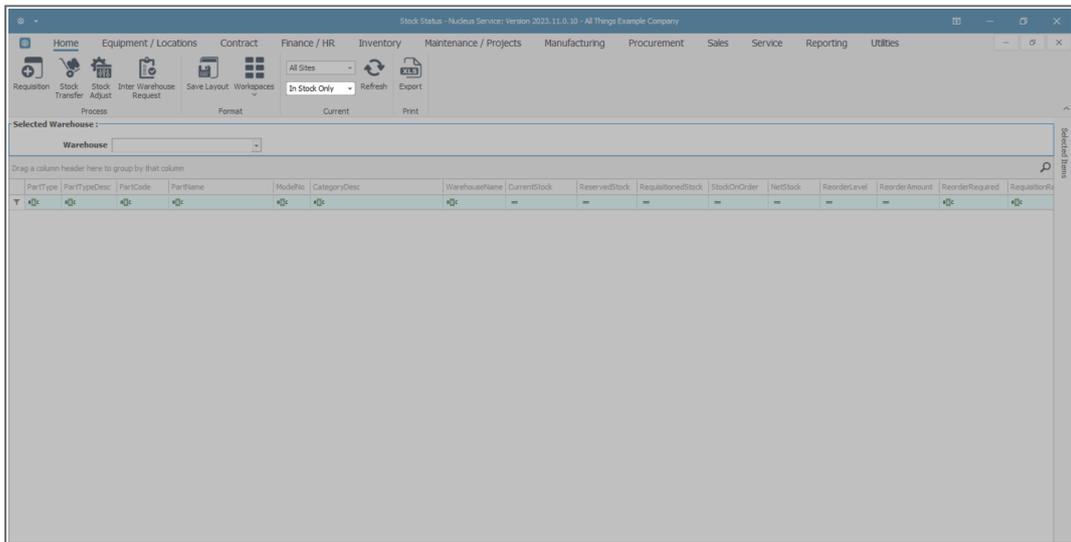**Ribbon** Select **Inventory > Stock**

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

SELECT THE SITE AND STATUS

- Select the **Site**.
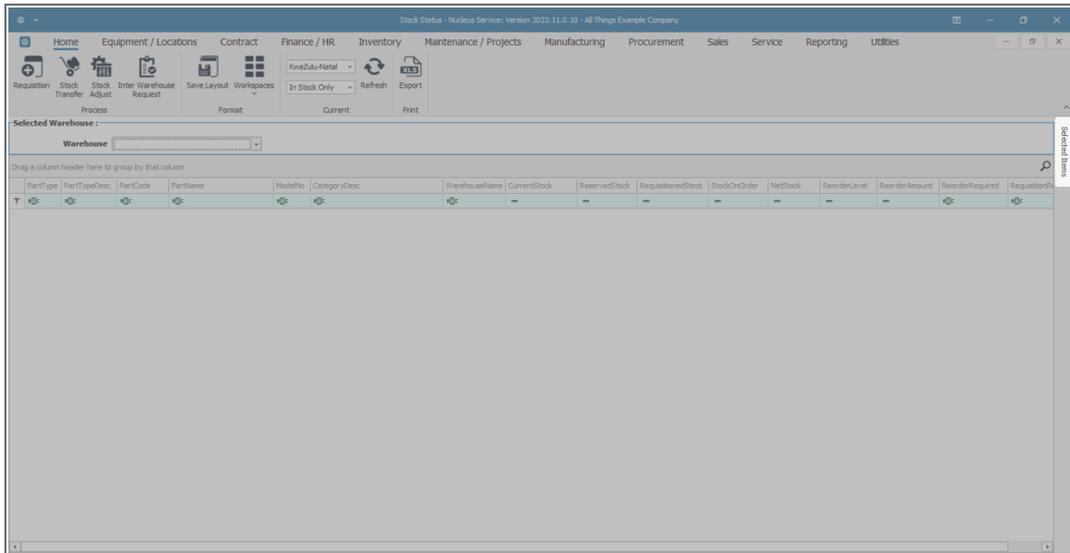   - In this image **KwaZulu-Natal** has been selected.

- This screen will open in the **In Stock Only** status.
  - This can remain unchanged.
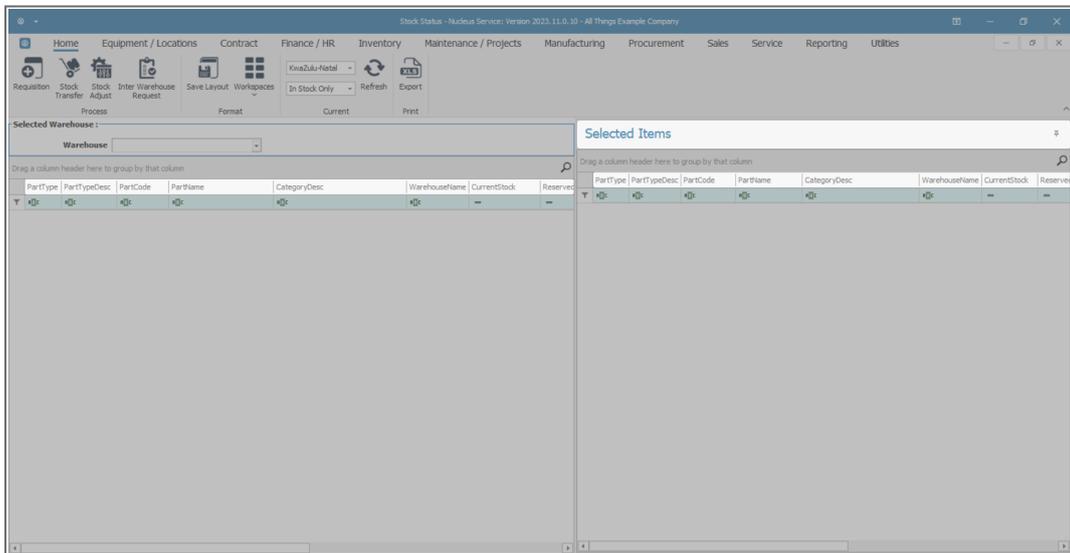

SELECTED ITEMS PANEL

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

- The **Selected Items** panel will be **expanded**.
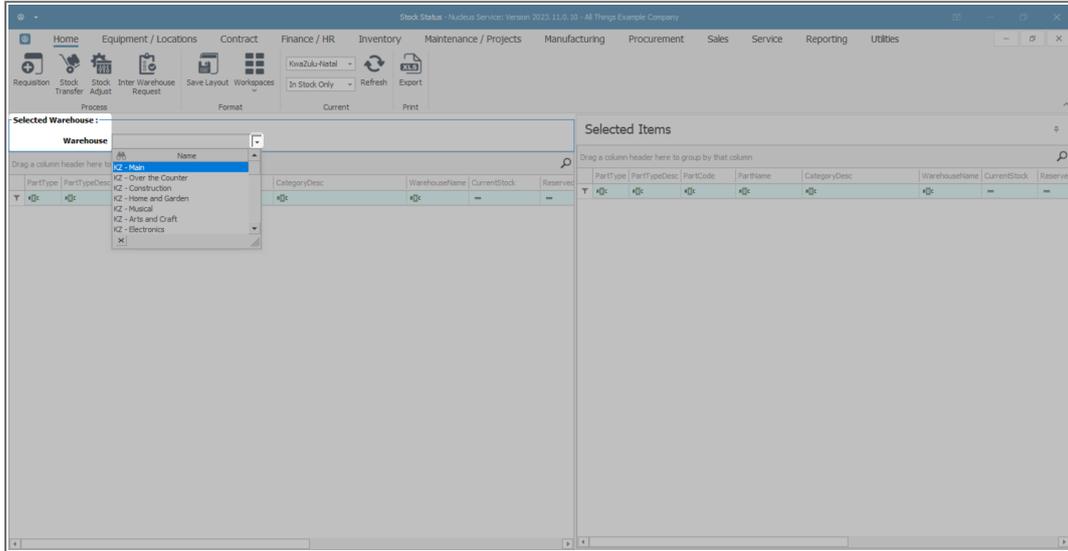- **Dock** this panel to make it easier to work in.

Refer to Docking Panels and Save Layout for detailed handling on these topics.

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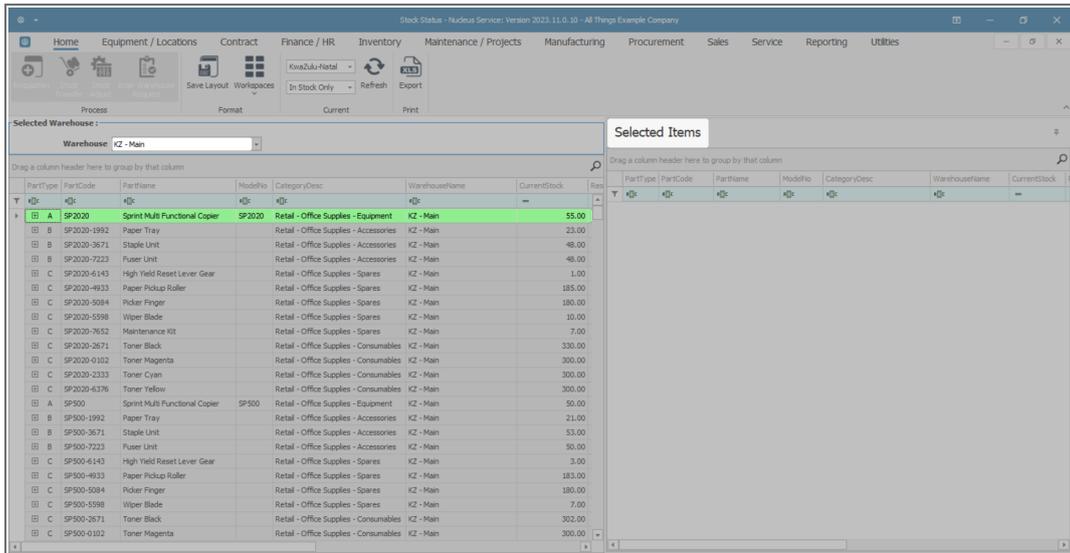
SELECT WAREHOUSE

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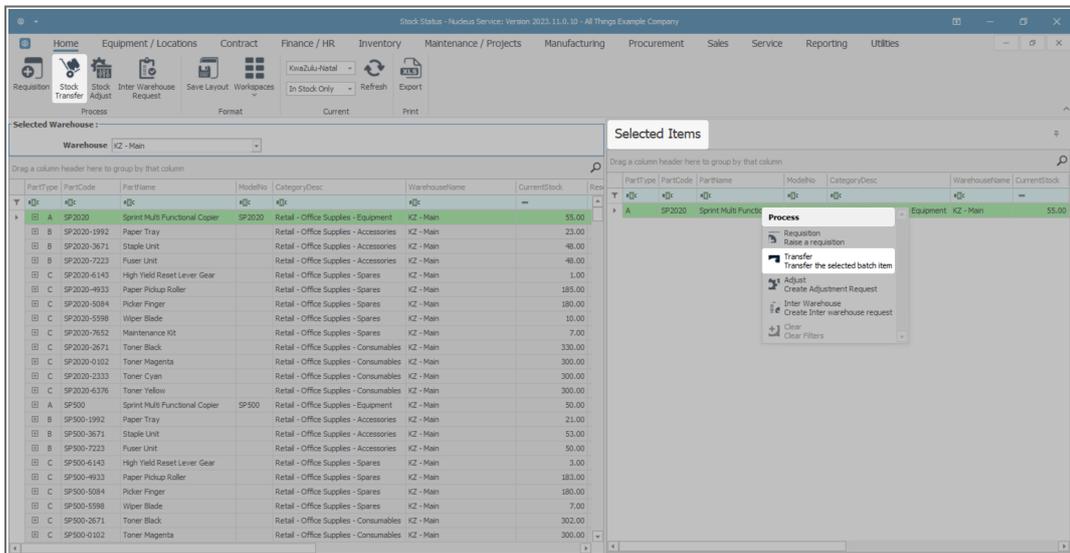 - In this image **KZN Main** has been selected.

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

SELECT ITEMS FOR TRANSFER

- **Click** and **hold** on the **stock item** that you wish to **transfer**.
- **Drag** and **drop** the selected item into the <u>right</u> hand **Selected Items** panel.
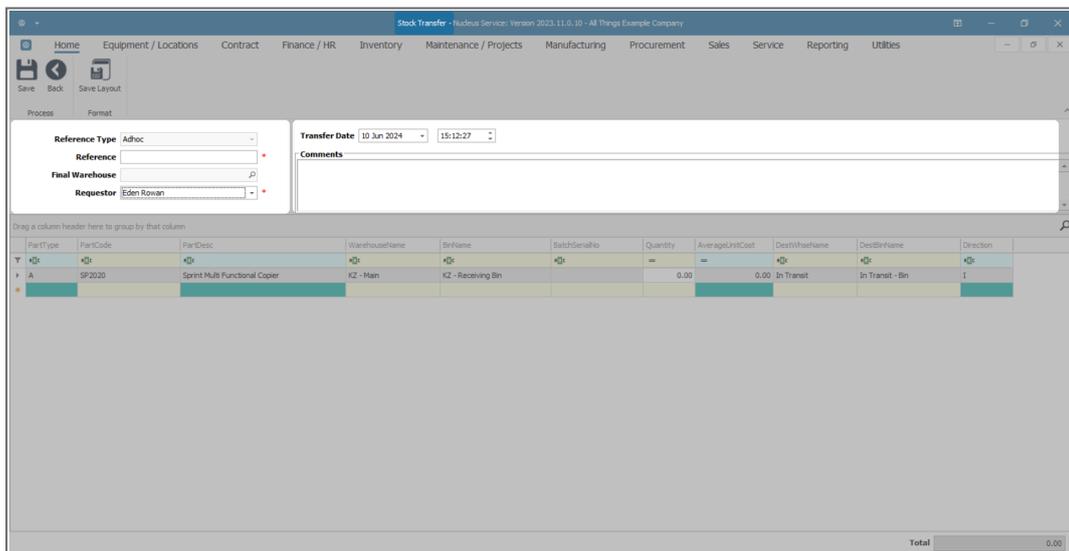
- The **Selected Items** panel will now contain the item details.

- Either, **right click** in the row of the selected item line.
- A **Process** menu will pop up.
- Click on **Transfer** - **Transfer the selected batch item**

- **Or** click on **Stock Transfer**.

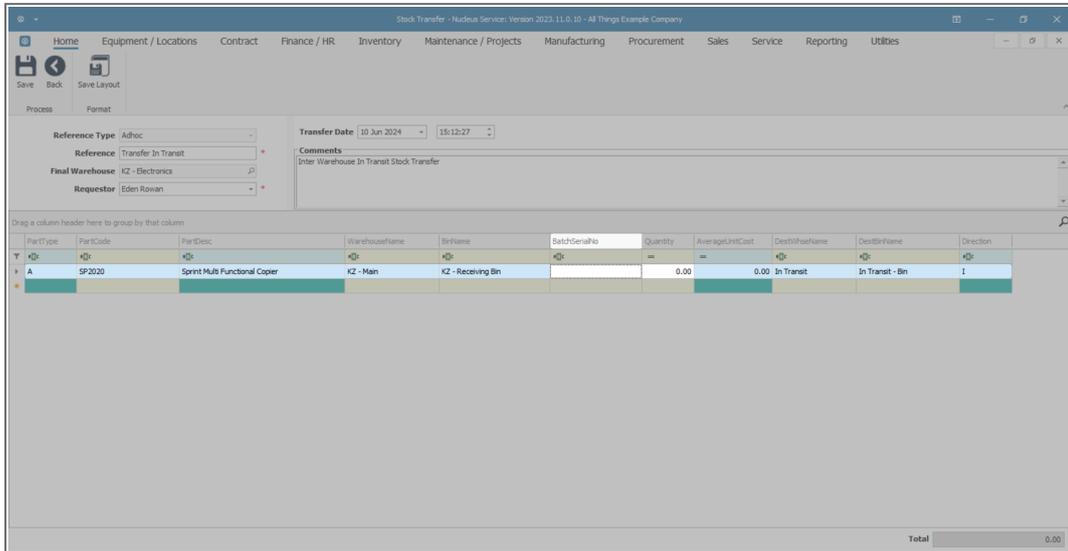- The **Stock Transfer** screen will be displayed.

- **Reference Type:** This will auto populate with **Adhoc**.
- **Reference:** Type in a reference relevant to this stock transfer.
- **Final Warehouse:** Click on the search icon and select a final destination warehouse for this stock transfer.
- **Requestor:** This will auto populate with the person currently logged on to the system but you can click on the drop-down arrow and select an alternative person responsible for the stock transfer if required.
- **Transfer Date 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 a relevant comment regarding this stock transfer in this text box if required.
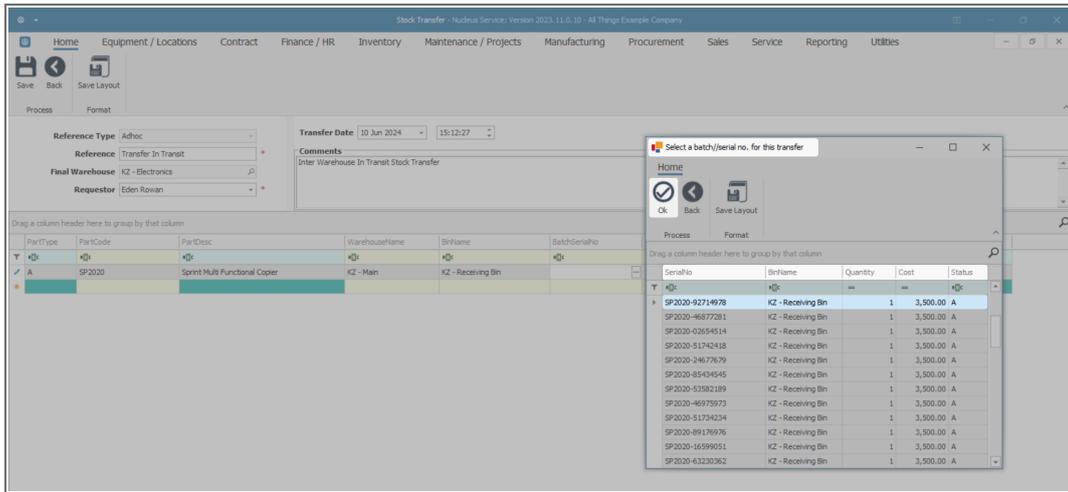
PARTS DATA GRID

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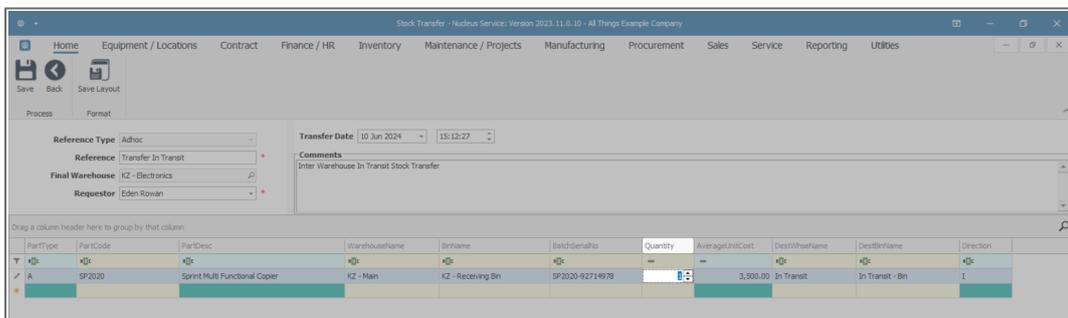- Click in the **Batch Number** text box.

SELECT BATCH/SERIAL NO.

- An **ellipsis** button will be revealed.
- Click on this button to display the **Select a batch/serial no. for this transfer** pop up screen.
- Click on the **row selector** in front of the **batch/serial number** that you wish to assign to this transfer.
- Click on **Ok**.

SELECT QUANTITY

- Click on the **Quantity** text box and either **type in** or use the **arrow indicators** to select the **stock quantity** that is required for this transfer.
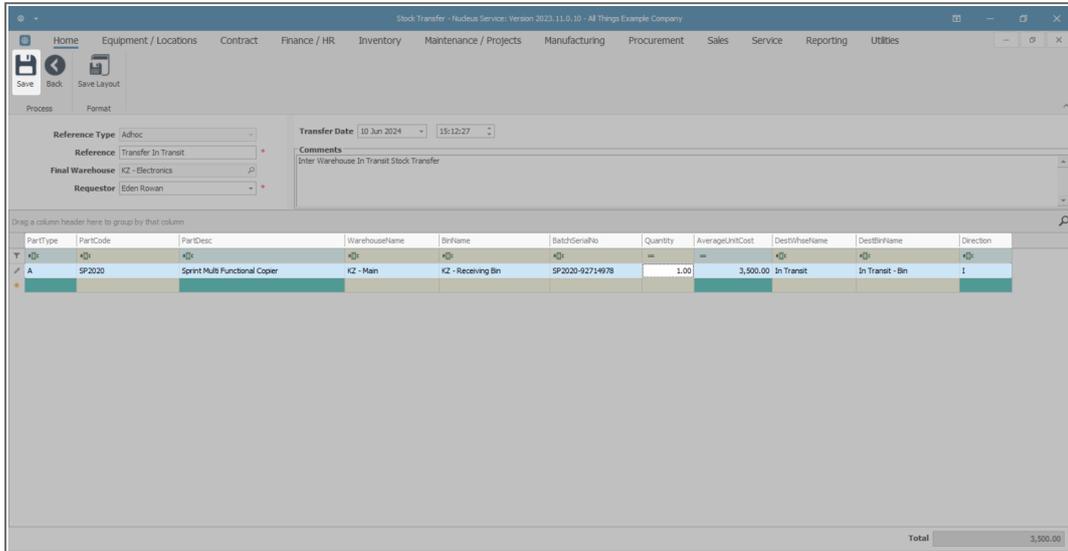
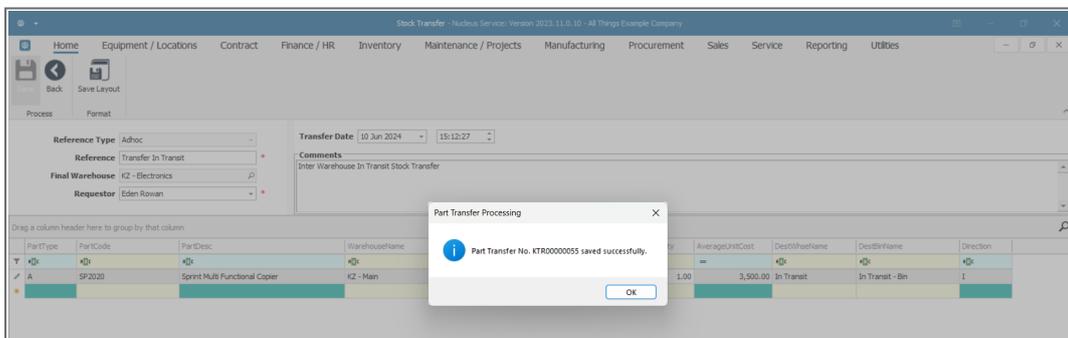**Note**: Remember that for **A** or **B**-Class items, the **Quantity** can only be **1** per line.

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

SAVE TRANSFER DETAILS

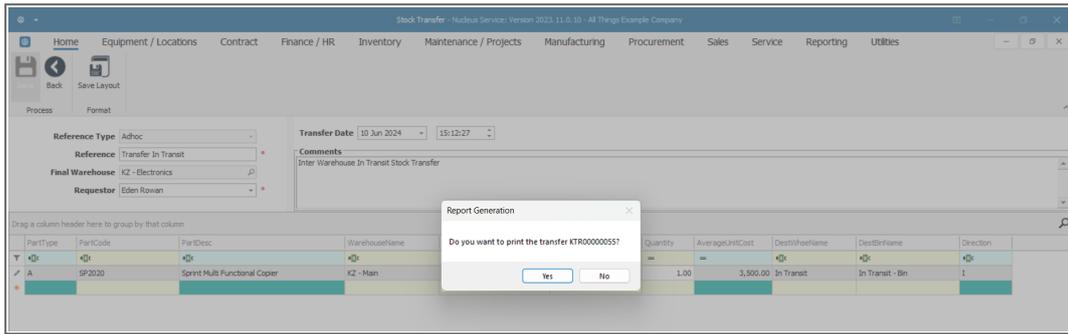- When you have finished working in this screen, click on **Save**.

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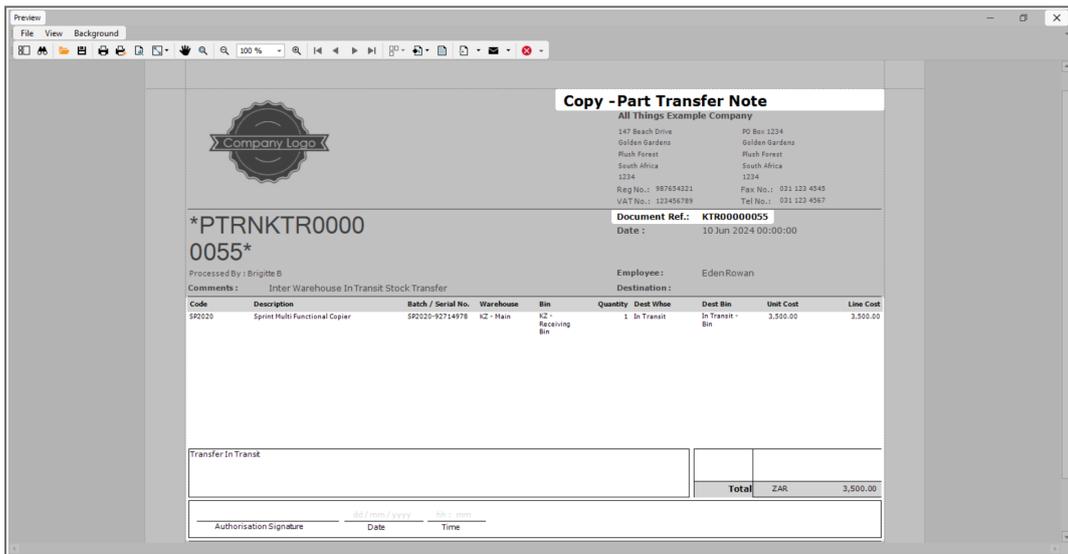- Click on **OK**.

PRINT TRANSFER NOTE

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

- Click on **Yes**.

REPORT PREVIEW

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

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

- Follow the instructions for Action Stock Transfer Request to transfer the part from the **InTransit** warehouse to the **final** warehouse.

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