

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 [Inter-Bin Stock Transfer](#) process, in this process, the **Source** warehouse will be different from the **Final/Destination** warehouse.

Take note of the important notes below:

- You will need to ensure that the Company Configuration **Enforce In-transit flag** is set to '**No**' to be able to complete this process.
- This will be a **direct transfer** to a **different warehouse** within a **different site**, and **no** receiving is required.
- Ensure that you select the correct **quantity** to be transferred.
- 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.
- Ensure that the correct **final/destination warehouse** in the new **destination site** is selected.

Ribbon Select **Inventory > Stock**

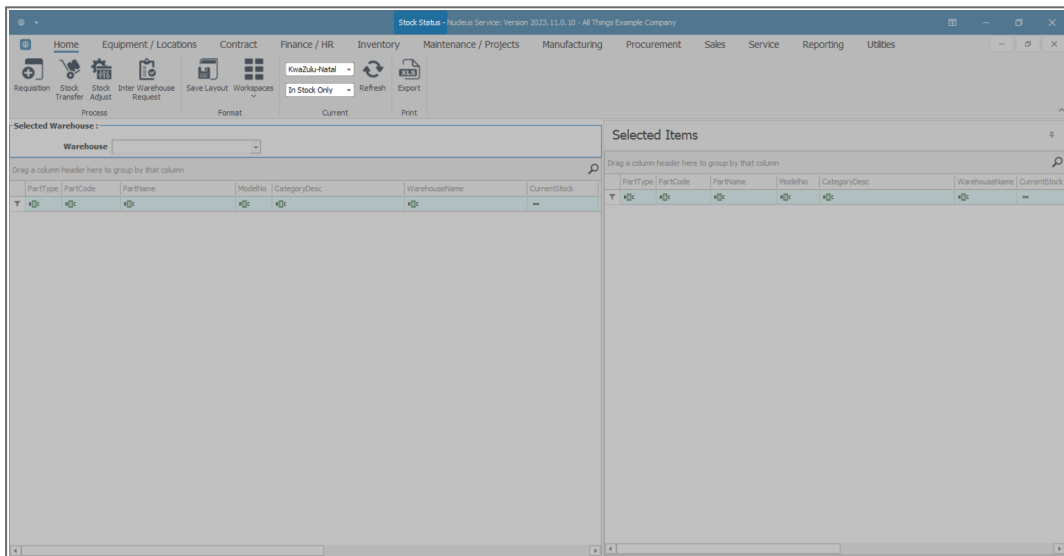


- The **Stock Status** screen will be displayed.

TRANSFER – C-CLASS ITEM

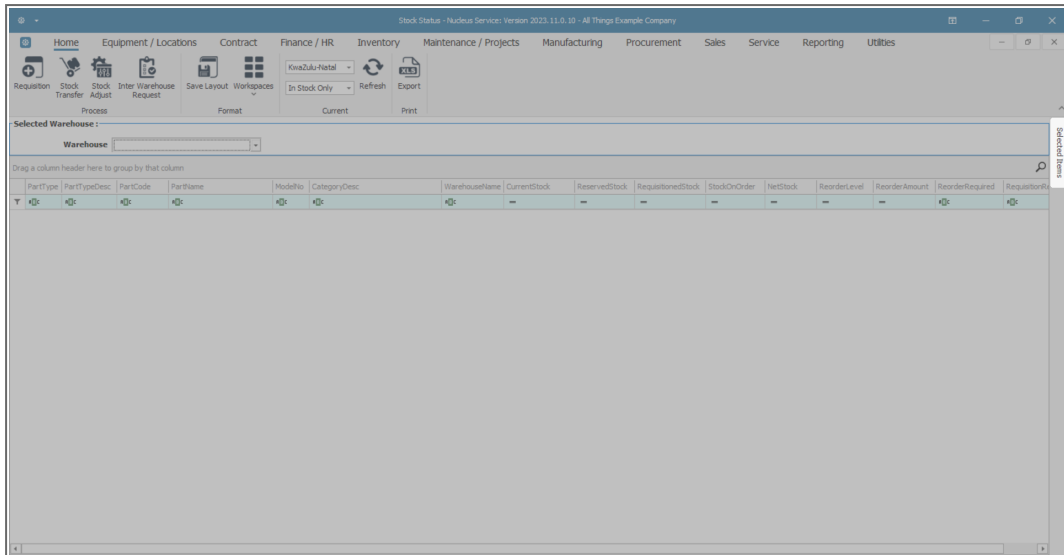
SELECT SITE AND STATUS

- Select the source location or **Site** where the **C-Class** stock is currently being stored.
 - In this example **KwaZulu-Natal** is selected.
- The screen **status** will default to **In Stock** only.
 - This status can remain selected.



SELECTED ITEMS PANEL

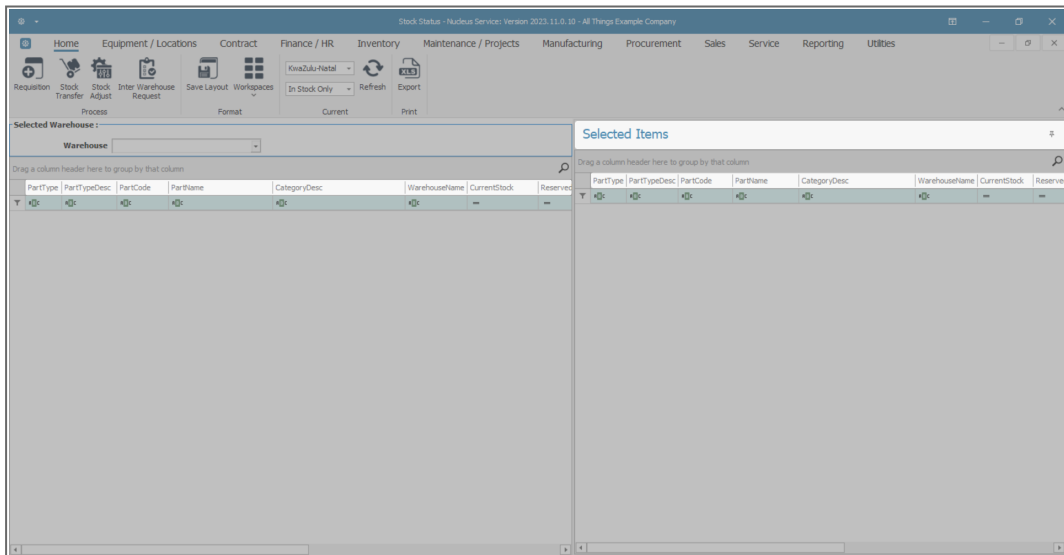
- Click on the **Selected Items** tab.



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

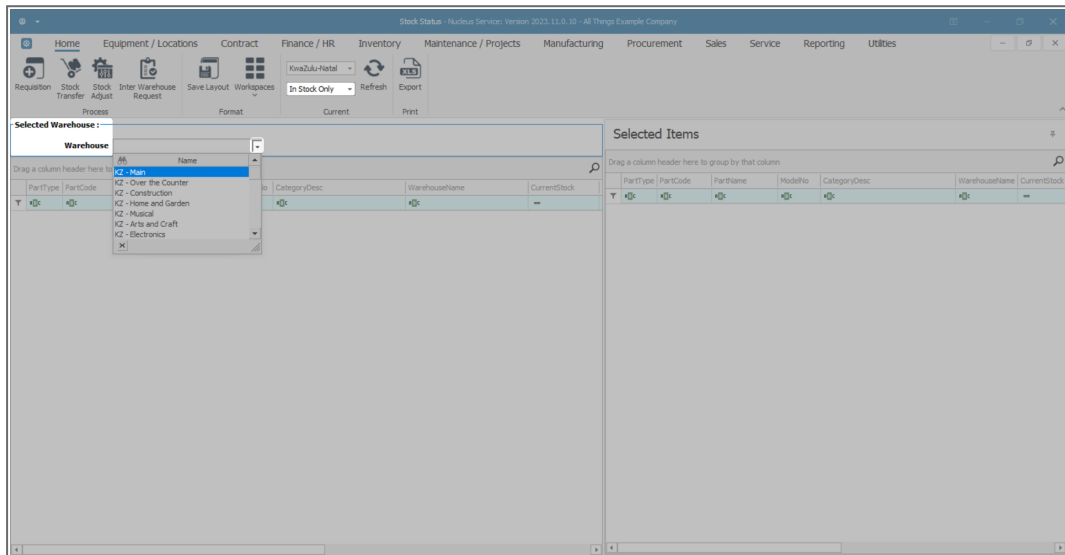
Refer to [Docking Panels](#) and [Save Layout](#) for detailed handling on these topics.

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



SELECT SOURCE WAREHOUSE

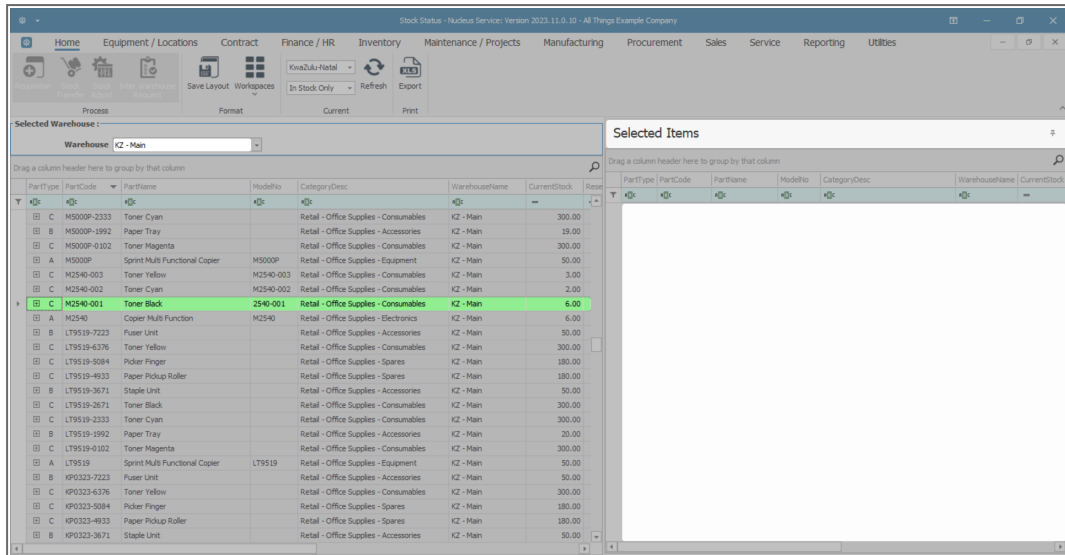
- Click on the drop-down arrow in the **Warehouse** field and select from the list the '**source warehouse**' (where the stock is **currently** being stored).
 - In this image, **KZN Main** has been selected.



- 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 into the **Selected Items** frame.



TRANSFER SELECTED ITEM(S)

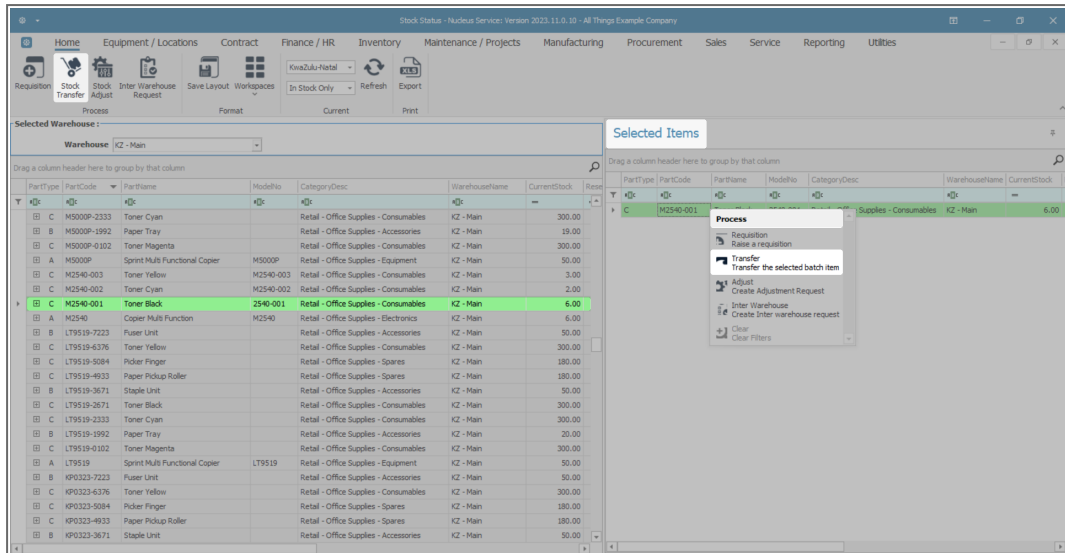
- The **Selected Items** panel will now contain the item details.

Method 1

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

Method 2

- Click on the item line in this frame, then click on **Stock Transfer**.

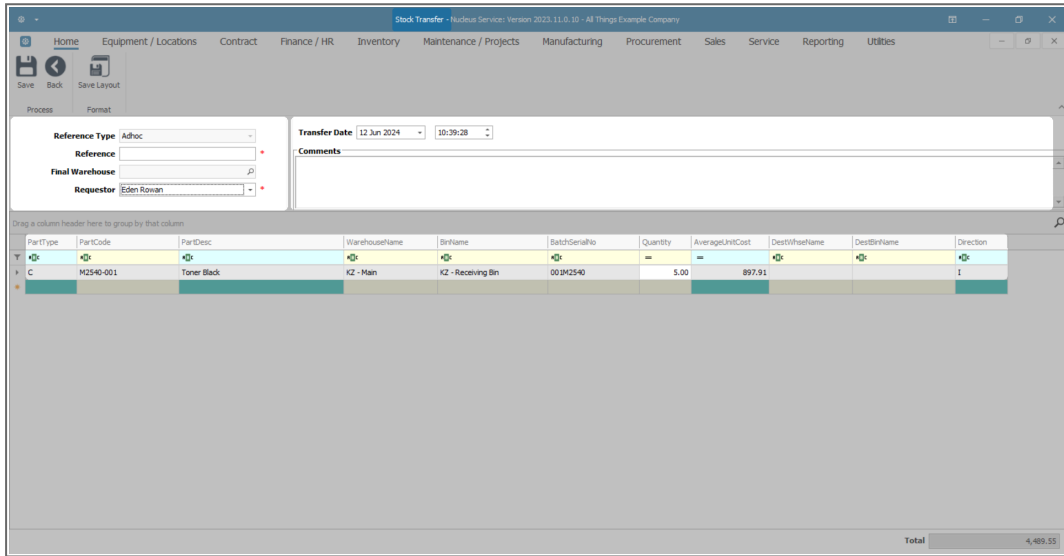


TRANSFER DETAILS

- The **Stock Transfer** screen will be displayed.
- **Reference Type:** This will auto populate with **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**. (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

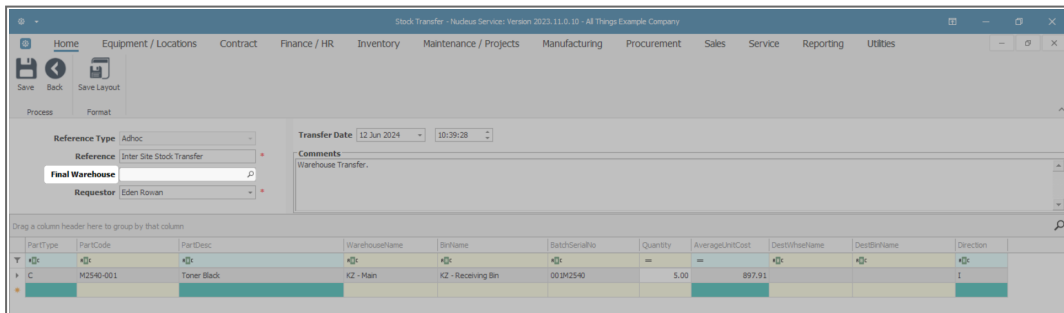
function to select an alternative date if required.

- **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.



SELECT FINAL WAREHOUSE

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

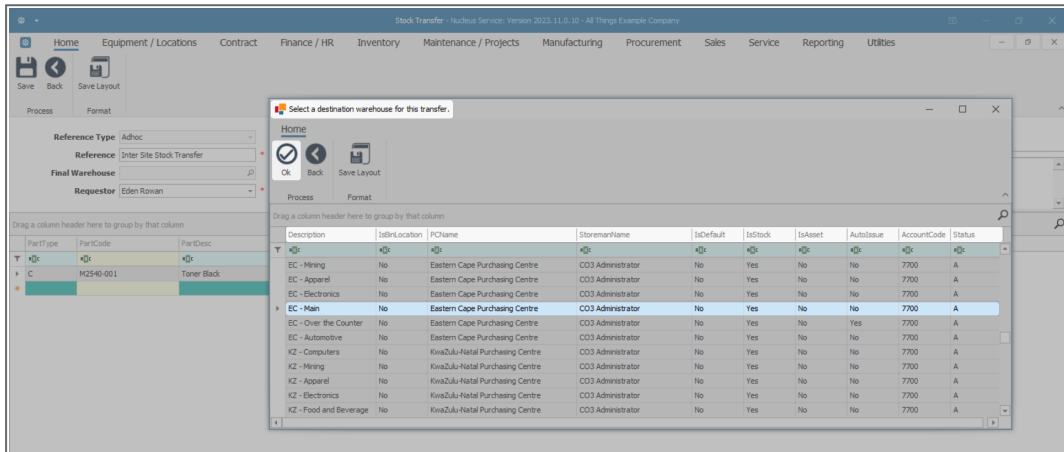


- The **Select a destination warehouse for this transfer** screen will pop up.

- Click on the **row selector** in front of the **warehouse** that you wish to be the **final destination** warehouse.

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**.



- 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

- **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 **EC Main** warehouse therefore the **Dest Bin Name** field has been populated with that one bin name.

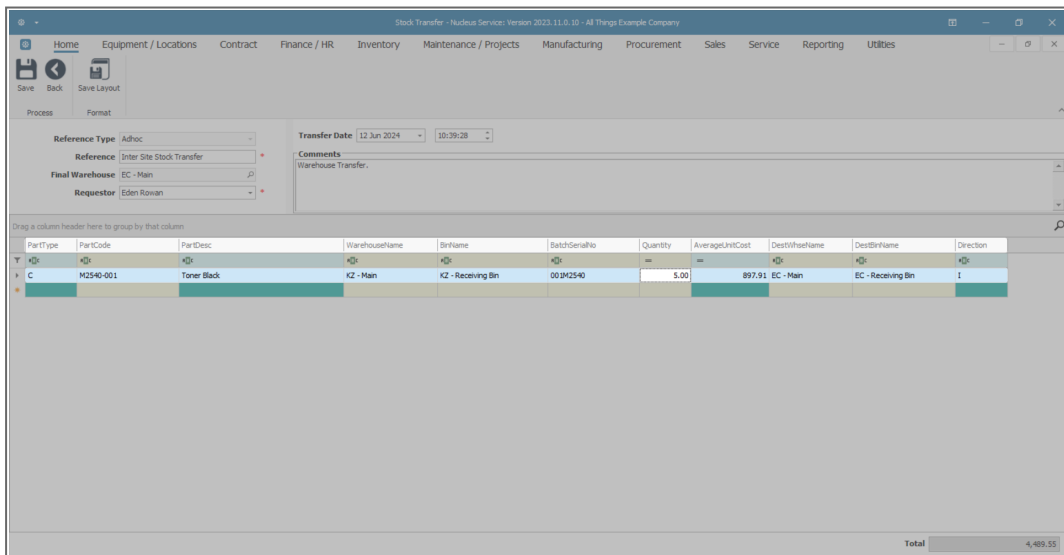
The screenshot shows the 'Stock Transfer' application window. The interface includes a navigation menu at the top with options like Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu, there are fields for 'Reference Type' (set to Adhoc), 'Reference' (Inter Site Stock Transfer), 'Final Warehouse' (EC - Man), and 'Requestor' (Eden Rowan). The 'Transfer Date' is set to 12 Jun 2024. A 'Comments' field contains 'Warehouse Transfer'. The main area is a data grid with the following columns: PartType, PartCode, PartDesc, WarehouseName, BinName, BatchSerialNo, Quantity, AverageUnitCost, DestWarehouseName, DestBinName, and Direction. A single row is visible with the following data: PartType 'C', PartCode 'M2540-001', PartDesc 'Toner Black', WarehouseName 'K2 - Man', BinName 'K2 - Receiving Bin', BatchSerialNo '001K2540', Quantity '5.00', AverageUnitCost '897.91', DestWarehouseName 'EC - Man', DestBinName 'EC - Receiving Bin', and Direction 'I'. A 'Total' field at the bottom right shows the value '4,489.55'.

PartType	PartCode	PartDesc	WarehouseName	BinName	BatchSerialNo	Quantity	AverageUnitCost	DestWarehouseName	DestBinName	Direction
C	M2540-001	Toner Black	K2 - Man	K2 - Receiving Bin	001K2540	5.00	897.91	EC - Man	EC - Receiving Bin	I

PARTS DATA GRID

- **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, only if there is **1** bin linked to the selected warehouse. Otherwise,
 - Click in this field to reveal an **ellipsis** button.
 - Click on this button.

- From the **Select a destination bin for this part transfer** screen that pops up, select the correct **bin location** name.
- 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 1** 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.
- The **Average Unit Cost** field will be populated with the average cost of **all** of the selected item type in the selected bin.



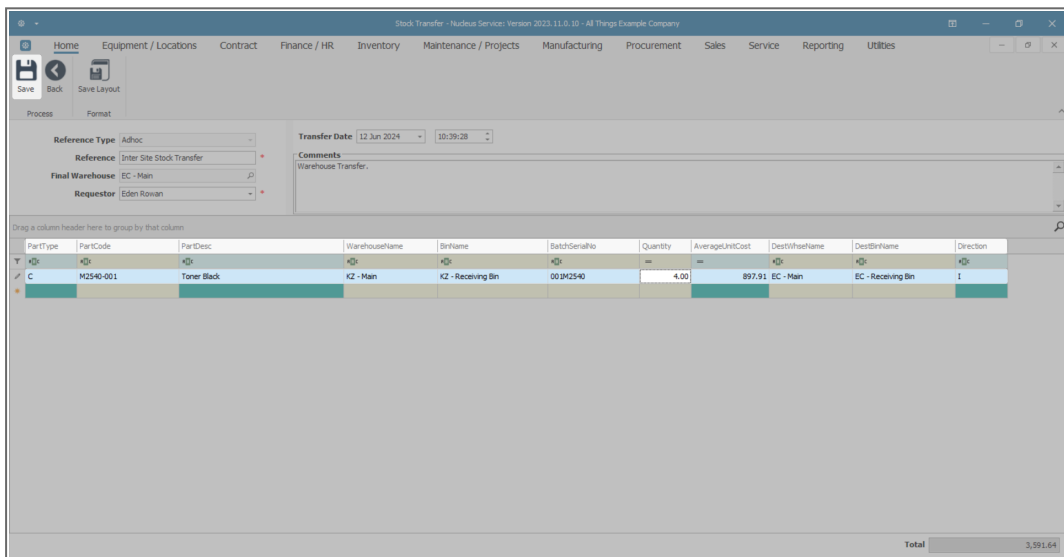
Select Quantity

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

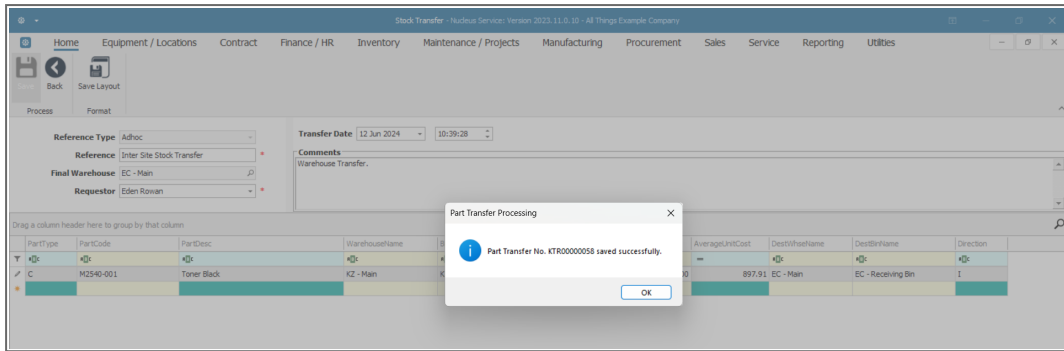
Note: The system will **not** allow you select for transfer more than the quantity available in the batch.

SAVE TRANSFER

- Click on **Save**.

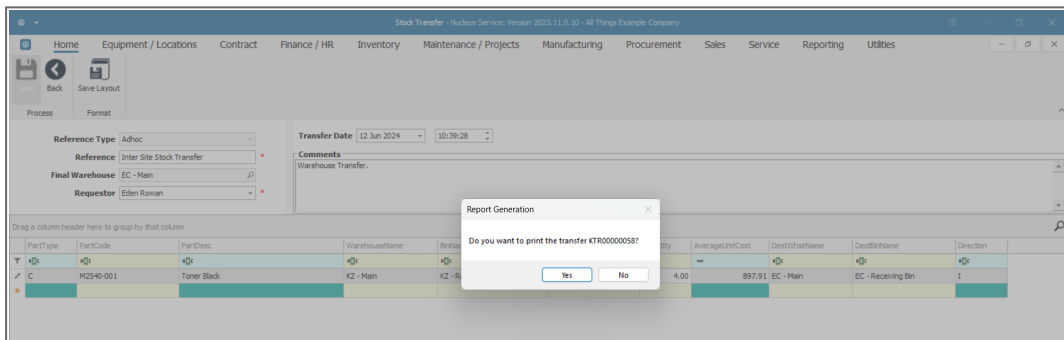


- A **Part Transfer Processing** message box will pop up informing you that:
 - **Part Transfer No. [] saved successfully.**
- Click on **OK**.



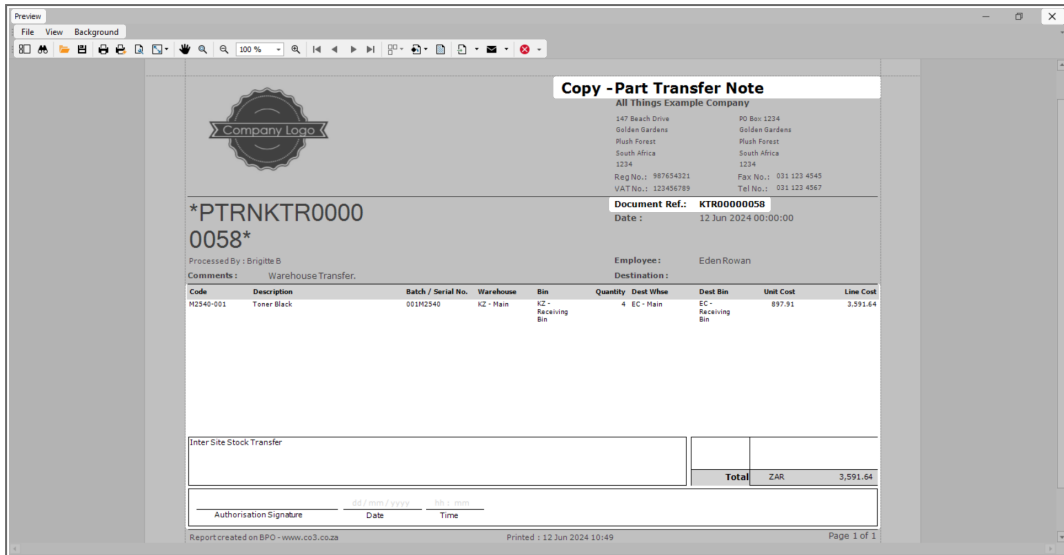
PRINT TRANSFER NOTE

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



The **Report Preview** screen will be displayed.

- You can see that **one** item has been transferred from
- the **KZN Main** and **KZ Receiving** bin into the
- **EC Main** warehouse and **EC Receiving Bin**.
- From here you can **View, Print, Export** or **Email** the Part Transfer Note.
- **Close** the Report Preview screen when you are done.



- 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 **Eastern Cape**.

The screenshot shows the 'Stock Status' application with the 'Inventory' tab selected. The 'Selected Warehouse' is 'KZ - Main'. The 'Selected Items' table contains the following data:

PartType	PartCode	PartName	ModelNo	Category/Desc	WarehouseName	CurrentStock
C	SP200-2671	Toner Black		Retail - Office Supplies - Consumables	KZ - Main	328
C	SP200-0102	Toner Magenta		Retail - Office Supplies - Consumables	KZ - Main	300
C	SP200-2333	Toner Cyan		Retail - Office Supplies - Consumables	KZ - Main	300
C	SP200-6376	Toner Yellow		Retail - Office Supplies - Consumables	KZ - Main	300
A	SP500	Sprint Multi Functional Copier	SP500	Retail - Office Supplies - Equipment	KZ - Main	49
B	SP500-1992	Paper Tray		Retail - Office Supplies - Accessories	KZ - Main	21
B	SP500-3671	Staple Unit		Retail - Office Supplies - Accessories	KZ - Main	53
B	SP500-7223	Fuser Unit		Retail - Office Supplies - Accessories	KZ - Main	50
C	SP500-6143	High Yield Reset Lever Gear		Retail - Office Supplies - Spares	KZ - Main	3
C	SP500-4933	Paper Pickup Roller		Retail - Office Supplies - Spares	KZ - Main	183
C	SP500-5084	Picker Finger		Retail - Office Supplies - Spares	KZ - Main	180
C	SP500-5598	Wiper Blade		Retail - Office Supplies - Spares	KZ - Main	7
C	SP500-2671	Toner Black		Retail - Office Supplies - Consumables	KZ - Main	302
C	SP500-0102	Toner Magenta		Retail - Office Supplies - Consumables	KZ - Main	300
C	SP500-2333	Toner Cyan		Retail - Office Supplies - Consumables	KZ - Main	300
C	SP500-6376	Toner Yellow		Retail - Office Supplies - Consumables	KZ - Main	300
A	A990	Sprint Multi Functional Copier	A990	Retail - Office Supplies - Equipment	KZ - Main	52
B	A990-1992	Paper Tray		Retail - Office Supplies - Accessories	KZ - Main	20
B	A990-3671	Staple Unit		Retail - Office Supplies - Accessories	KZ - Main	50
B	A990-7223	Fuser Unit		Retail - Office Supplies - Accessories	KZ - Main	50
C	A990-4933	Paper Pickup Roller		Retail - Office Supplies - Spares	KZ - Main	180
C	A990-5084	Picker Finger		Retail - Office Supplies - Spares	KZ - Main	180
C	A990-2671	Toner Black		Retail - Office Supplies - Consumables	KZ - Main	300

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

Select Destination Warehouse

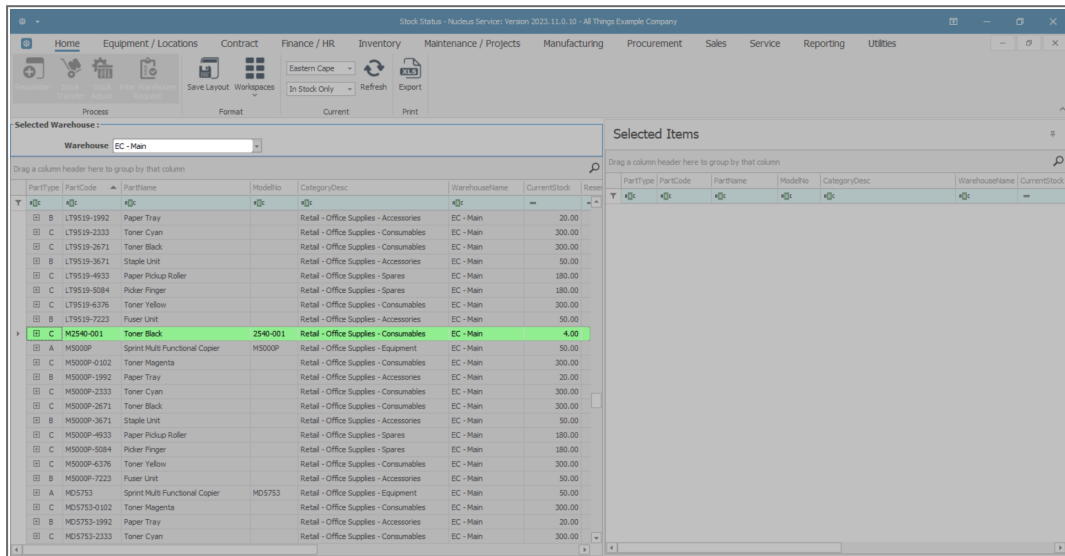
- Click on the drop-down arrow in the **Warehouse** field and select the **destination warehouse**.
 - In the example above, the destination warehouse selected was **EC Main**.

The screenshot shows the 'Stock Status' application with the 'Warehouse' dropdown menu open. The 'Selected Warehouse' is now 'EC - Main'. The 'Selected Items' table contains the following data:

PartType	PartCode	PartName	ModelNo	Category/Desc	WarehouseName	CurrentStock
C	MD5753-0102	Toner Magenta		Retail - Office Supplies - Consumables	KZ - Main	300
B	M5000P-1992	Paper Tray		Retail - Office Supplies - Accessories	KZ - Main	19
C	M5000P-2333	Toner Cyan		Retail - Office Supplies - Consumables	KZ - Main	300
C	M5000P-2671	Toner Black		Retail - Office Supplies - Consumables	KZ - Main	300
B	M5000P-3671	Staple Unit		Retail - Office Supplies - Accessories	KZ - Main	50
C	M5000P-4933	Paper Pickup Roller		Retail - Office Supplies - Spares	KZ - Main	180
C	M5000P-5084	Picker Finger		Retail - Office Supplies - Spares	KZ - Main	180
C	M5000P-6376	Toner Yellow		Retail - Office Supplies - Consumables	KZ - Main	300
B	M5000P-7223	Fuser Unit		Retail - Office Supplies - Accessories	KZ - Main	50
A	MD5753	Sprint Multi Functional Copier	MD5753	Retail - Office Supplies - Equipment	KZ - Main	50
C	MD5753-0102	Toner Magenta		Retail - Office Supplies - Consumables	KZ - Main	300
C	MD5753-1992	Paper Tray		Retail - Office Supplies - Accessories	KZ - Main	20
C	MD5753-2333	Toner Cyan		Retail - Office Supplies - Consumables	KZ - Main	300
C	MD5753-2671	Toner Black		Retail - Office Supplies - Consumables	KZ - Main	299
B	MD5753-3671	Staple Unit		Retail - Office Supplies - Accessories	KZ - Main	50

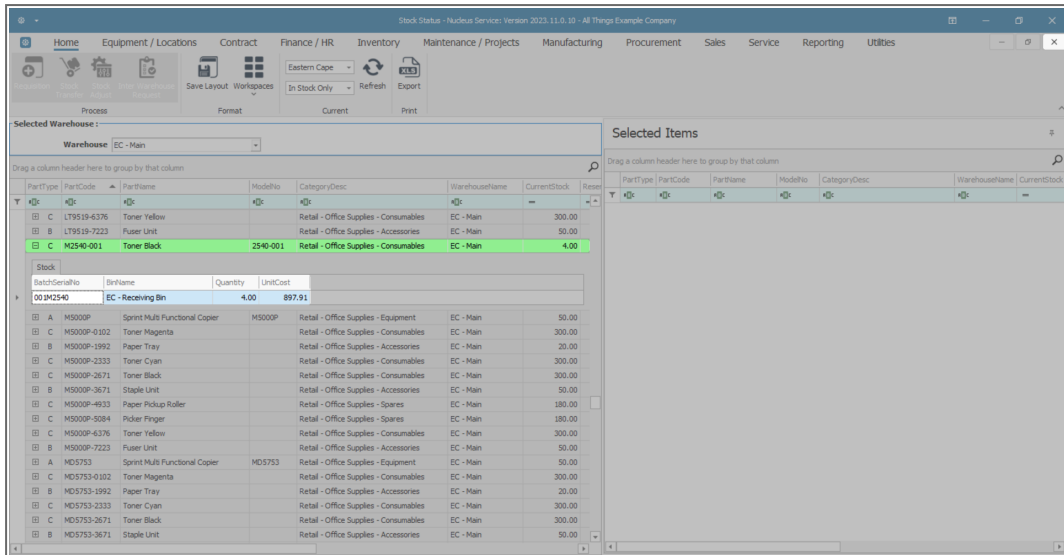
View Transferred Stock

- The **Selected Warehouse** frame will populate with a list of the **In-Stock** items.
- Click on the **expand** button in the item line.



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

- **C-Class** item - [M2540-001],
- from **BatchSerial Number** [001M2540 - the batch number as selected above]
- has been transferred to **Bin Name** [EC Receiving Bin - the bin name as selected above].
- **Close** the screen when you are done.



TRANSFER A OR B-CLASS ITEM

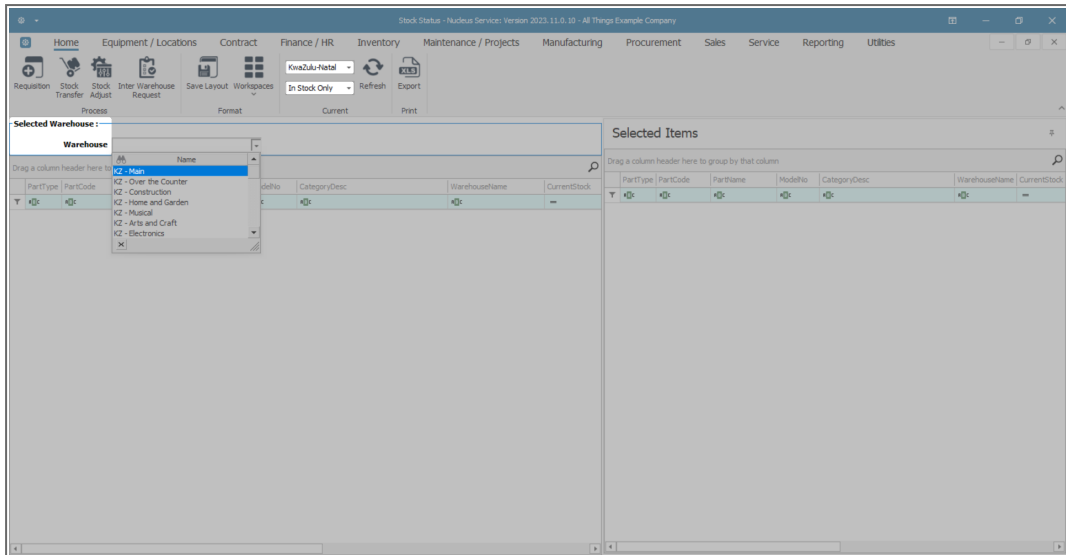
To transfer an A or B-Class item, you will follow almost exactly the same process as for above. The only differences are found in the **BatchSerialNo**, **Quantity** and **Average Unit Cost** fields in the **Stock Transfer** screen.

SELECT SOURCE SITE

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

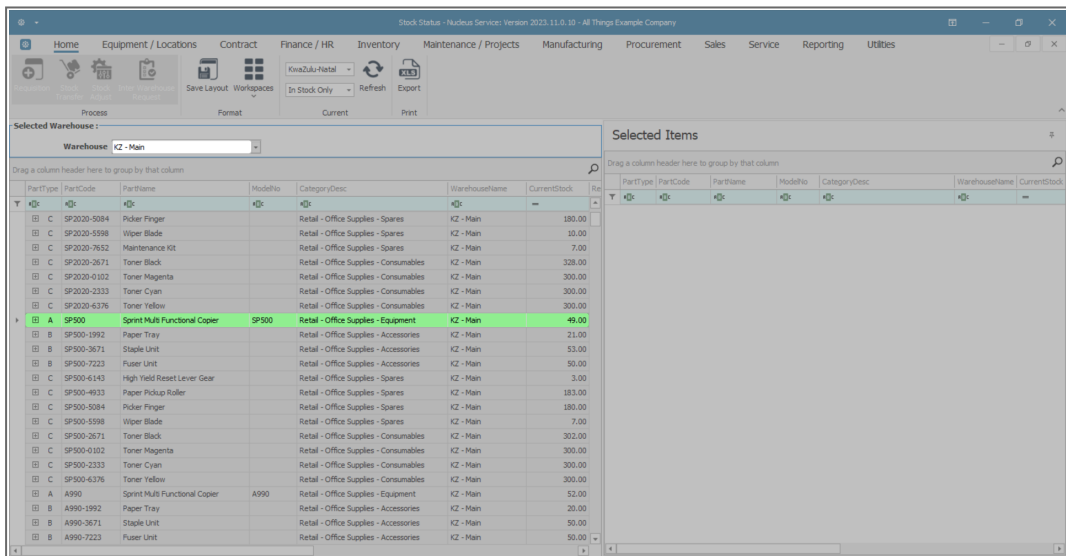
SELECT SOURCE WAREHOUSE

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



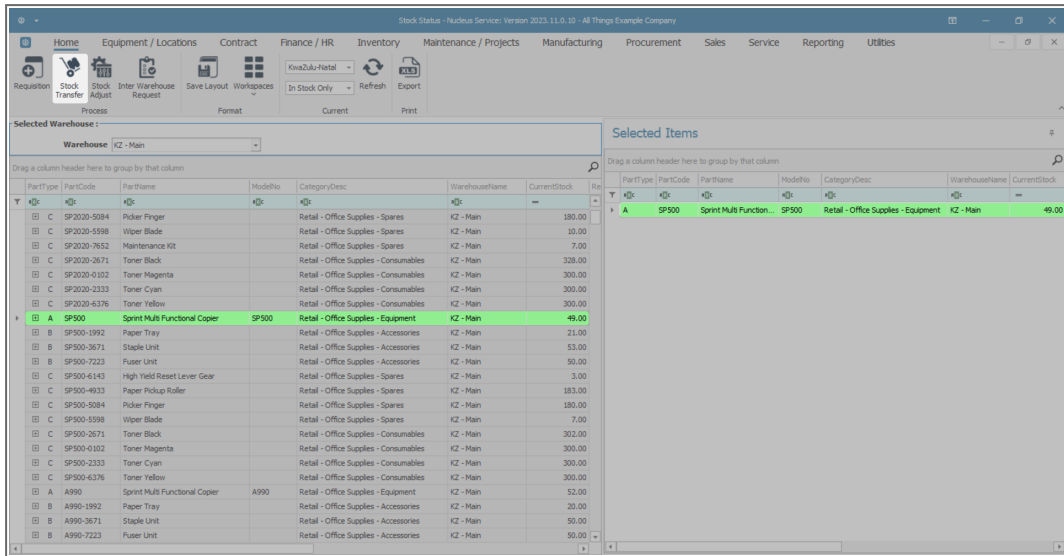
SELECT A OR B-CLASS ITEM FOR TRANSFER

- 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.
- **Drag and drop** this line into the **Selected Items** frame.



- The **Selected Items** frame will now contain a copy of the **A-Class** item line.

- Click on **Stock Transfer**.

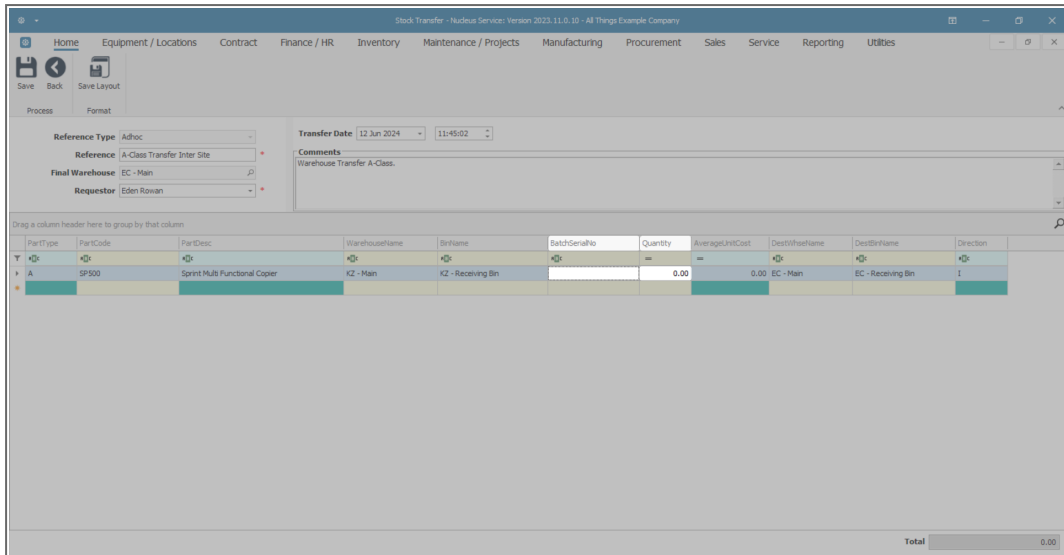


PARTS DATA GRID

Add the details as explained above in the [Transfer C-Class Item to a Different Site Warehouse](#) process above.

QUANTITY

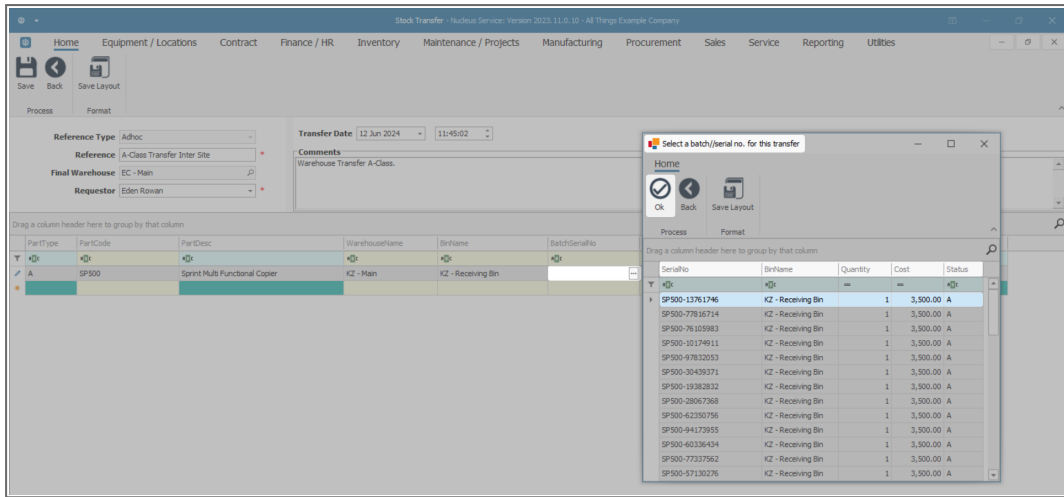
- You will note that:
 - The **Quantity** field displays **0**. (Unlike C-Class items, where this field is initially populated with the entire amount of the items available in the selected warehouse bin).
 - The **Average Unit Cost** field displays **0**.
- Click in the **BatchSerialNo** field.



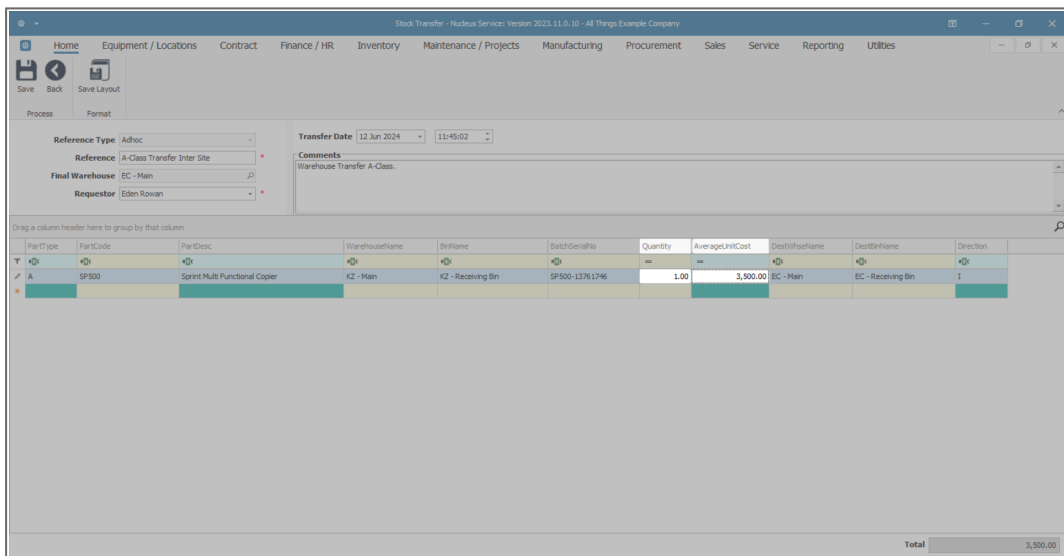
PartType	PartCode	PartDesc	WarehouseName	BinName	BatchSerialNo	Quantity	AverageUnitCost	DestWarehouseName	DestBinName	Direction
A	SP500	Sprint Multi Functional Copier	KZ - Main	KZ - Receiving Bin		0.00	0.00	EC - Main	EC - Receiving Bin	I

SELECT ITEM TO TRANSFER

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



- The **Quantity** field will now populate with **1** (only one 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.

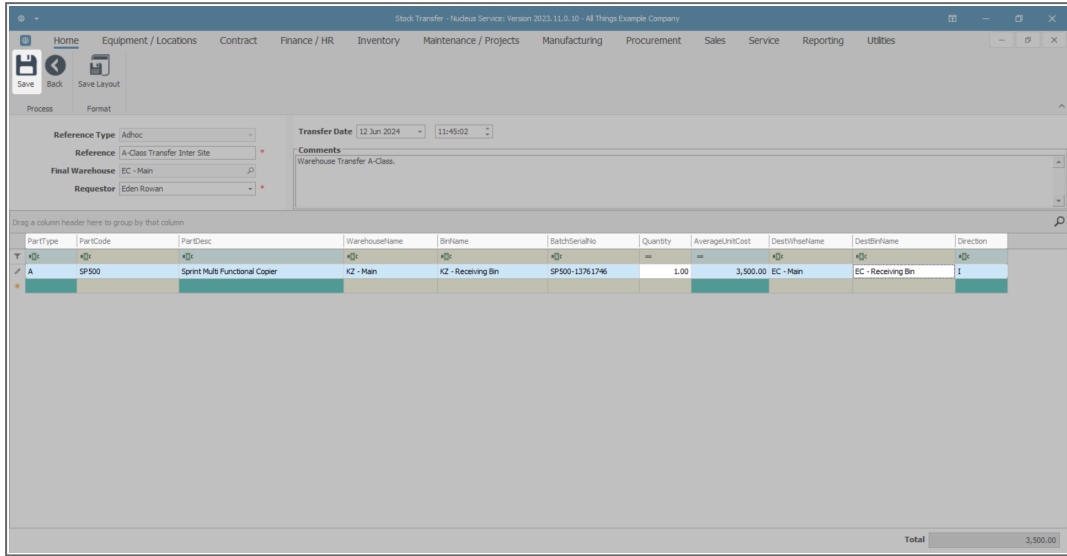


SELECT DESTINATION BIN

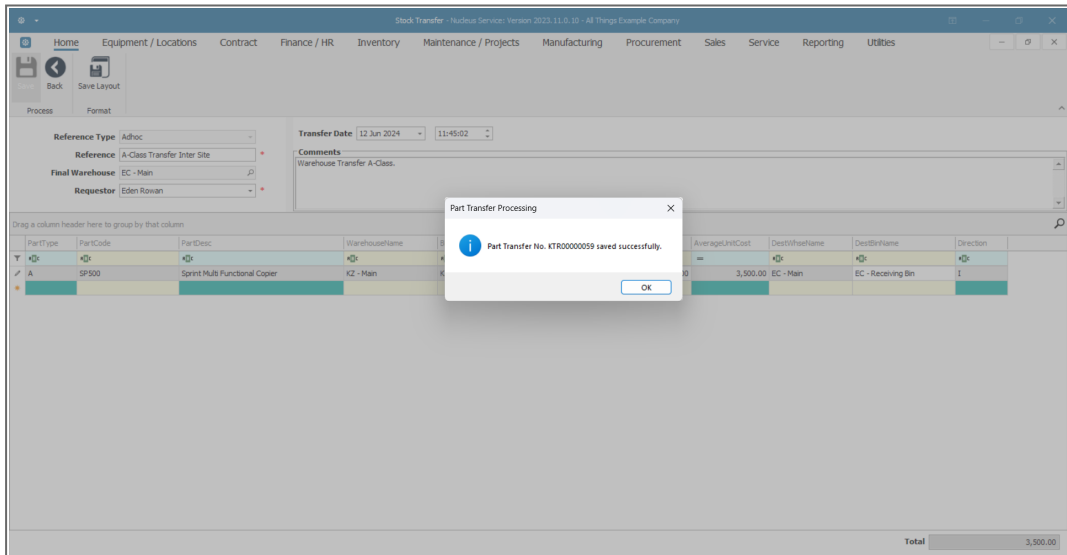
- If not already populated (if, for example there is more than one bin in the destination warehouse) then select the **Destination Bin**

name at this point.

- Click on **Save**.

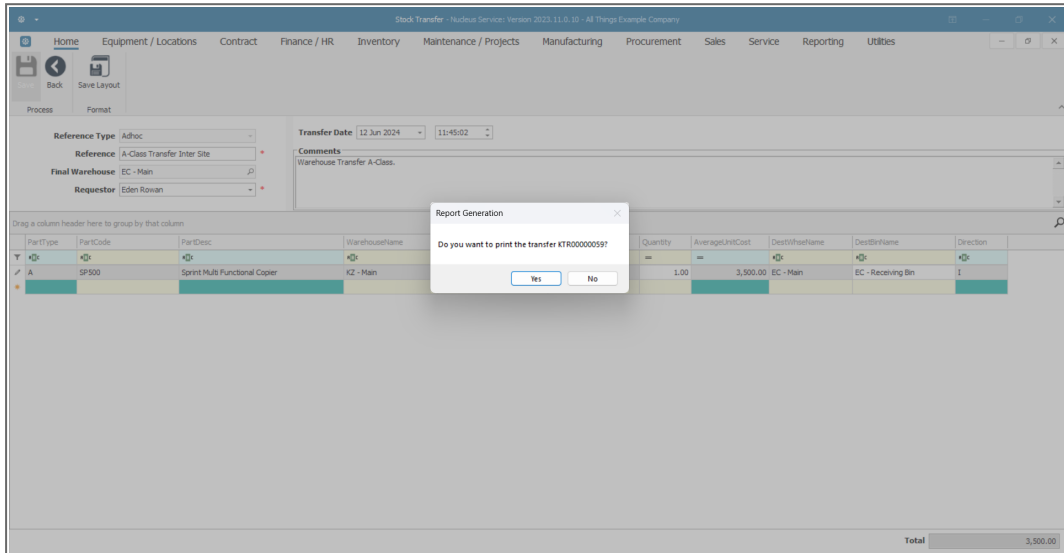


- A **Part Transfer Processing** message box will pop up informing you that -
 - **Part Transfer No. [] saved successfully.**
- Click on **OK**.



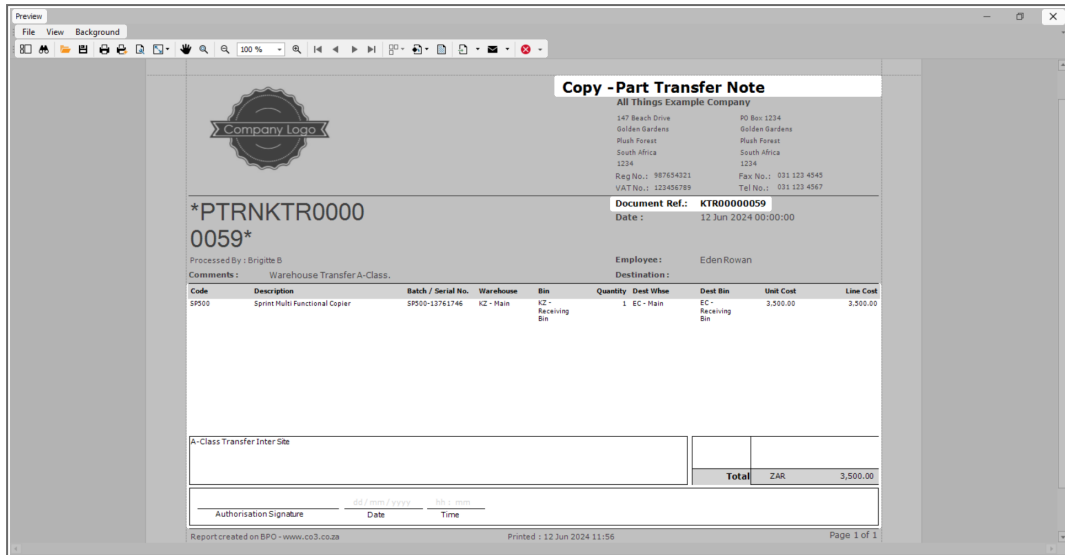
PRINT TRANSFER NOTE

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



The **Report Preview** screen will be displayed.

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



- 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 [View the C-Class item in the Destination Warehouse](#) process.

MNU.037.011

