

INVENTORY

IN-TRANSIT INTER-WAREHOUSE TRANSFER

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

- You will need to ensure that the Company Configuration Enforce
 In-transit flag is set to 'Yes' to be able to complete this process.
- Once stock is transferred to the 'In-Transit' warehouse, the stock must then be <u>Received from the In-Transit warehouse</u> into the destination warehouse.
- 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 Select 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 **KwaZulu-Natal** has been selected.
- This screen will open in the In Stock Only status.
 - This can remain unchanged.

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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 **KZ-Main Warehouse** has been selected.

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

SELECT ITEMS TO TRANSFER

• 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:

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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

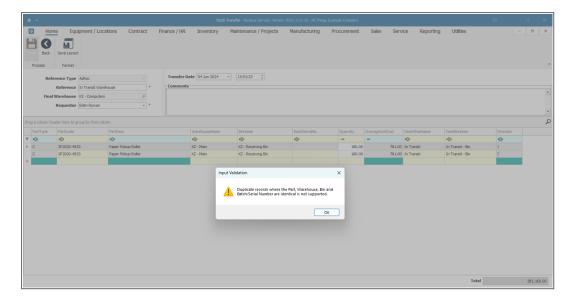
- Click on the first item, then hold the Ctrl button on your keyboard, whilst using your mouse to click on the other item lines that you wish to add. Use this method for items that are not in order. (The items should all be highlighted as they are selected).
- Once you have selected multiple items using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

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Note: Duplicate records where the Part, Warehouse, Bin and Batch / Serial Number are identical is not supported.



TRANSFER ITEMS TO IN-TRANSIT WAREHOUSE

• You can see in this image that all the item lines have been copied to the **Selected Items** frame.

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• Click on **Stock Transfer**.



TRANSFER HEADER DETAILS

- The Stock Transfer screen will be displayed.
- In this image, you can see that all the selected item lines have been brought across to this screen.
- You will note that the system has auto populated the Destination
 Warehouse Name and Destination Bin Name fields with the name of the In-Transit Warehouse and bin as set up in Warehouse
 Configuration.
- Fill in the details in the **Header** frame:
 - **Reference Type:** This will auto populate with **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.



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SELECT FINAL DESTINATION WAREHOUSE

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

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• 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**.

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

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

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

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- 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.
- Click in the **row selector** in front of the **Serial No** of the item that you wish to transfer.
- Click on **Ok**.

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



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

- 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** fields will be populated with the average cost of all of these items in the selected bin.
- 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.



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	Requestor Eden Rowan	* *										
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PartType		PartDesc		WarehouseName	BinName	BatchSerialNo		AverageUnitCost	DestWhseName	DestBinName	Direction	
∎∏c	*[]r	s]]c			KZ - Receiving Bin	n <u>□</u> t	=	-	∎c In Transit	*0:	*[]c	
A	SP2020 SP2020-2671	Sprint Multi Functional Copie Toner Black	er -	KZ - Main KZ - Main	KZ - Receiving Bin	SP2020-45062446	1.00		In Transit	In Transit - Bin In Transit - Bin	I	
C C	542020-2671	Toner black		NZ - Mart	NZ - Kebelving bin	1	313.00	350.00	In Transic	un iransic - bin	1	
										Total		113,050.0

- 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.
- Click on the **row selector** in front of the **Batch Serial No** that you wish to select an item from, for the stock transfer.
- Click on Ok.
- Make note of the **quantity** available in the selected batch. (We will refer to this in the next image).

Save Back	Equipment	t / Locations	Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procure	ment Sales	Service	Reporting	Utilities			- 0
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PartType								d Dra							
* #[]c	*[] t	a∏c			n⊡c	40:	a∏c		BinName	BatchSerialNo	Quantity	AverageUnitCost		• 🛛 c	
A	SP2020	Sprint Mi	ulti Functional Copie	r	KZ - Main	KZ - Receiving Bin	SP2020-45062446	T	a 🗆 c	4()c	-	-			
, c	SP2020-2671	Toner Bla	ack		KZ - Main	KZ - Receiving Bin			KZ - Receiving Bin		311.00	350	.00	I	
									KZ - Receiving Bin	10000A001	6.00		.00	_	
									KZ - Receiving Bin	1090AA	1.00		1.00		
								L	KZ - Receiving Bin	200	1.00	336	1.00		

• The **Batch Serial No** field will now be populated with the batch number selected in the previous step.



- 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.
- The amount in the **Average Unit Cost** field will remain the same as it is calculated across all batches.

0	B Home	Equipment / Loc	ations Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales Serv	rice Reporting	Utilities		- 02	×
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	R	Eden Rowan	- *											
39	g a column heade	er here to group by that col	umn											۶
		PartCode	PartDesc		WarehouseName	BinName	BatchSerialNo	Quantity	AverageUnitCost	DestWhseName	DestBinName	Direction		
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		SP2020	Sprint Multi Functional Cop	ier	KZ - Main	KZ - Receiving Bin	SP2020-45062446	1.00		In Transit	In Transit - Bin	I		
1	C	SP2020-2671	Toner Black		KZ - Main	KZ - Receiving Bin	10000A001	6.00	350.00	In Transit	In Transit - Bin	I		
											Total		5,60	0.0

- 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

• Click on Save.



Save Process	me Equipment / Los Save Layout Format	cations Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales Serv	rice Reporting	Utilities		- 0	×
	erence Type Adhoc Reference InTransit Tran		Comments		* 14:24:15 C								
	Requestor Eden Rowan	• •											
PartType	PartCode			WarehouseName	BinName		Quantity	AverageUnitCost	DestWhseName	DestBinName			
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A	SP2020	Sprint Multi Functional Copier		KZ - Main	KZ - Receiving Bin	SP2020-45062446	1.00		In Transit	In Transit - Bin	I		
c	SP2020-2671	Toner Black		KZ - Main	KZ - Receiving Bin	10000A001	1.00		In Transit	In Transit - Bin	I		
										Total		3,85	0.00

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

φ -												
O Hor	me Equipment / Loci	ations Contract F	inance / HR Inventory	Maint	enance / Projects	Manufacturing	Procurement	Sales Serv	ice Reporting	Utilities	-	ØX
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	Reference InTransit Transi	fer •	Comments Stock Transfer In Transit Warehou	10								
Fina	Warehouse KZ - Office Supp											
	Requestor Eden Rowan	- *										-
Drag a column h	eader here to group by that colu	mn			Part Transfer Process		×					Q
PartType	PartCode	PartDesc	WarehouseName	Bi	Part Transfer Process	ing	×	AverageUnitCost	DestWhseName	DestBinName	Direction	
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A	SP2020	Sprint Multi Functional Copier	KZ - Main	K	2 🚺 Part Transf	er No. KTR00000035 saved	successfully.	3,500.00	In Transit	In Transit - Bin	I	
/ C	SP2020-2671	Toner Black	KZ - Main	K	-			350.00	In Transit	In Transit - Bin	I	
·							ОК	_				1

PRINT TRANSFER NOTE

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



Ho	me Equipment / Le	ocations Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales Serv	ice Reporting	Utilities		- 0)
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	Reference InTransit Tra	nsfer *	Comments										
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	Requestor Eden Rowan	*											
rag a column h	eader here to group by that o	olumn			-								
PartType	PartCode	PartDesc	WarehouseNam		Report Generation ×		Quantity	AverageUnitCost	DestWhseName	DestBinName	Direction		
	a∏c	*[] C		n∐c			-	-	∎⊑c	A[]c	∎C		
*[]c	SP2020 Sprint Multi Functional Copie			KZ - Main	Do you want to print the transfer KTR00000035?		1.00	3,500.00	In Transit	In Transit - Bin	I		
A A	SP2020	Sprint Multi Functional Cop	xer										
r •∐c A ∕ C	SP2020 SP2020-2671	Sprint Multi Functional Cop Toner Black		KZ - Main		Yes No	1.00	350.00	In Transit	In Transit - Bin	I		

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

- Here you can view the item **batch** and **serial** numbers that were selected.
- You can view the source warehouse and source bin.
- You can view the **destination warehouse** is the **In-transit** warehouse and **destination bin** is the **In-transit** bin.
- From here you can **View**, **Print**, **Export** or **Email** the Part Transfer Note.

Copy -Pert Pransfer Note Liftings complet Company Liftings complete Liftings complete PPTENDKTR0000 Dots	Preview File View Background	# @ @]	000 % - Q, I4 4 > >I	®-କ-∎ ନ	· • • •						-	٥	
Processed by: Bryate 8 Employee: Eden Rowan Comments: Stock Transfer In Transit Warehouse Destination: Comments: Stock Transfer In Transit Warehouse Destination: Stock Transfer In Transit Transfer Stock Transfer In Transit Transfer In Transit Transfer Destination: In Transfer Destination:	N W - B 9 6 D V-		mpany Logo	8°• •• • □ □ □	· · •		All Things Example 147 Beach Drive Golden Gardens Plush Forest South Africa 1234 Reg No.: 987654321 VAT No.: 123456789	ple Company PO Goi Plu Son 12: Fax Tel	Box 1234 Iden Gardens sh Forest uth Africa 34 x No.: 031 123 4545 I No.: 031 123 4567				
Ook Description Back / Secal (No. Quantity frest (No. Desc (No. Use Code Lise Code <thlise code<="" th=""> Lise Code Lise Code<td></td><td>0035</td><td>*</td><td></td><td></td><td></td><td>Date :</td><td>04 Jun 2024</td><td>100:00:00</td><td></td><td></td><td></td><td></td></thlise>		0035	*				Date :	04 Jun 2024	100:00:00				
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			d on BPO - www.co3.co.za							Page 1 of 1			

• **Close** the Report Preview screen when done.

• You will return to the Stock Status screen.



VIEW TRANSFERRED ITEMS IN INTRANSIT WAREHOUSE

Ribbon Select Inventory > InTransit

Categories Parts Boots
 Agustients Detensies Part Researchs
 Research
 Research

- The **Parts InTransit** screen will be displayed.
- Here you can view a list of the **A** and **C**-Class items transferred from the source warehouse.
- You may need to select the **Site** if the system has opened the screen in a different Site.
- In this screen you can receive the items.

4						Parts Intransit - Nudeu										×
	🕘 <u>Home</u> E	Home Equipment / Locations Contract Finance / HR Inventory		y Maintenano	e / Projects	Manufacturing	Procurement	Sales	Service	e Reporting Utilities			Ø	×		
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Applied Filter : Contains([DocNo], 'KTR00000035')																
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	KTR0000035	PTRN	С	SP2020-2671	Toner Black	In Transit	In Transit - Bin	10000A001	350	.00	1.00					
	KTR0000035	PTRN	A	SP2020	Sprint Multi Functional Copier	In Transit	In Transit - Bin	SP2020-45062446	3,500	.00	1.00					

Related Topics

 <u>Receive Stock Transfer from In-Transit Warehouse to final Destination</u> Warehouse

MNU.037.012