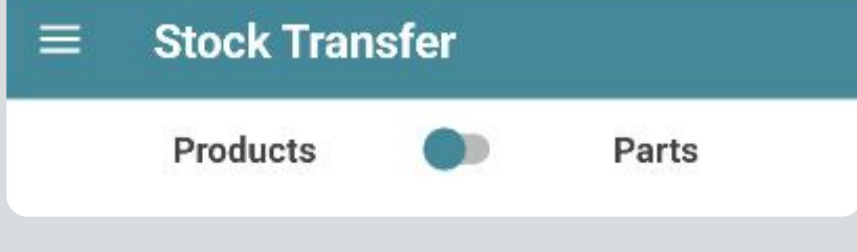


# STOCK TRANSFERS

## Create a Stock Transfer

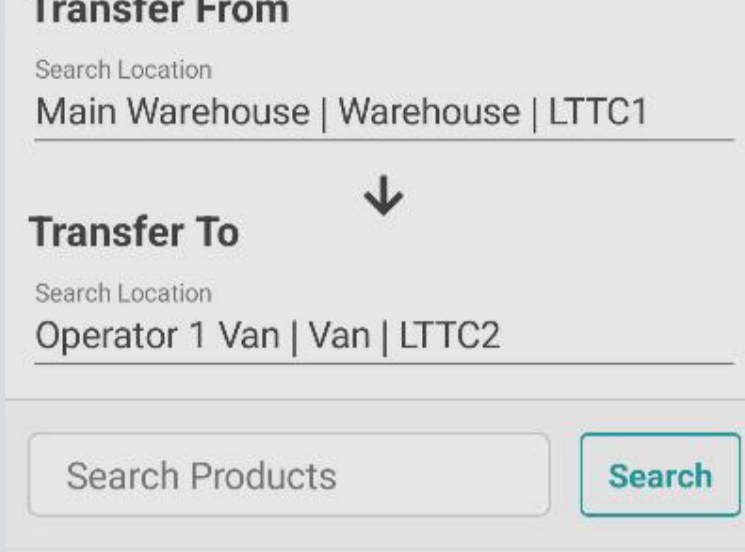
To complete a stock transfer through the app, you will need to navigate to the menu icon in the top left of the screen, then select 'Stock Transfer'.

To navigate between Products and Parts, you can select the toggle icon which will change the view.

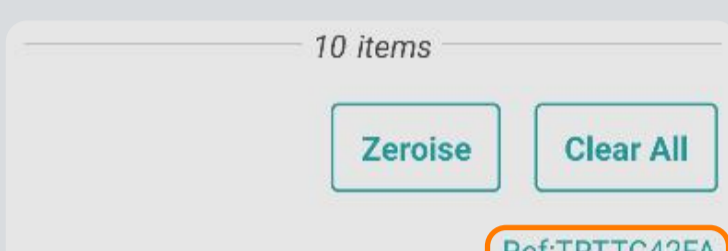


To start a stock transfer, you will need to select the **source location** (From Location) and the **destination location** (To Location), searching can be done through the **Name, Reference or Type**.

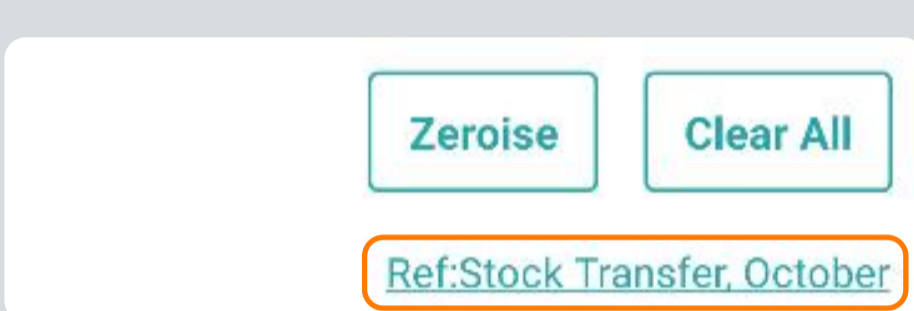
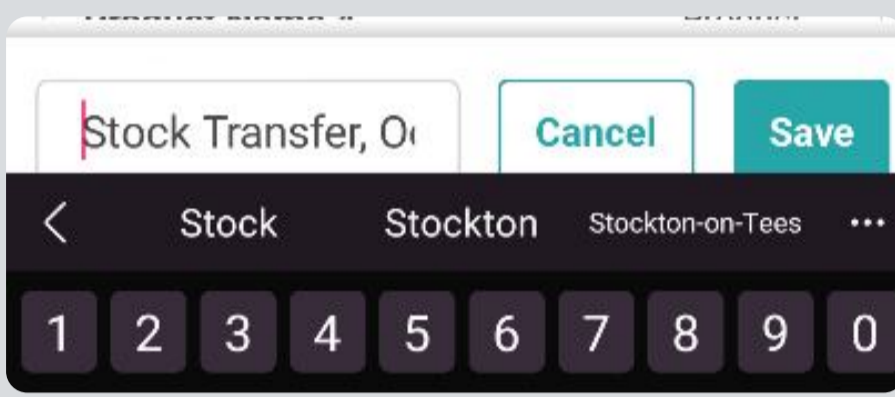
Once selected, the stock transfer screen will be loaded.



Each stock transfer loads with a prepopulated reference. To update this reference for your specific stock transfer, select the **Reference** link.



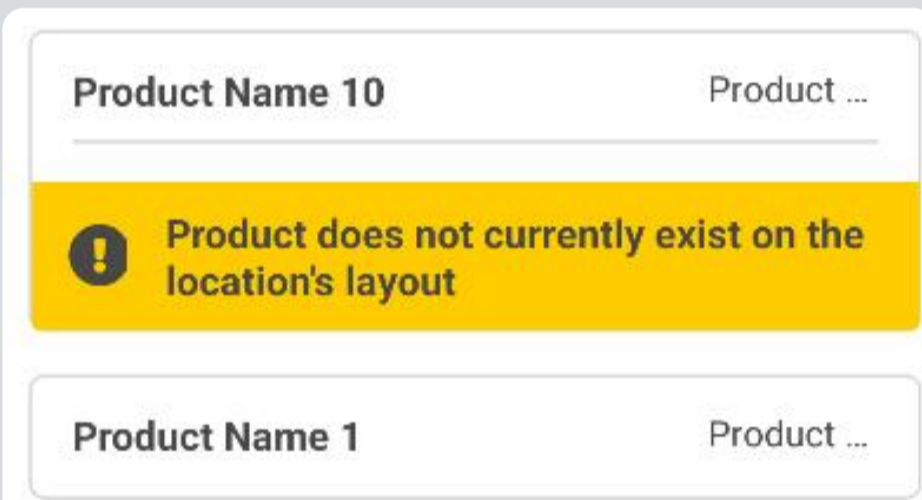
You can amend the reference to match your stock transfer. Select **Save** to update it.



If a product or part is not present at the 'To' Location during a stock transfer:

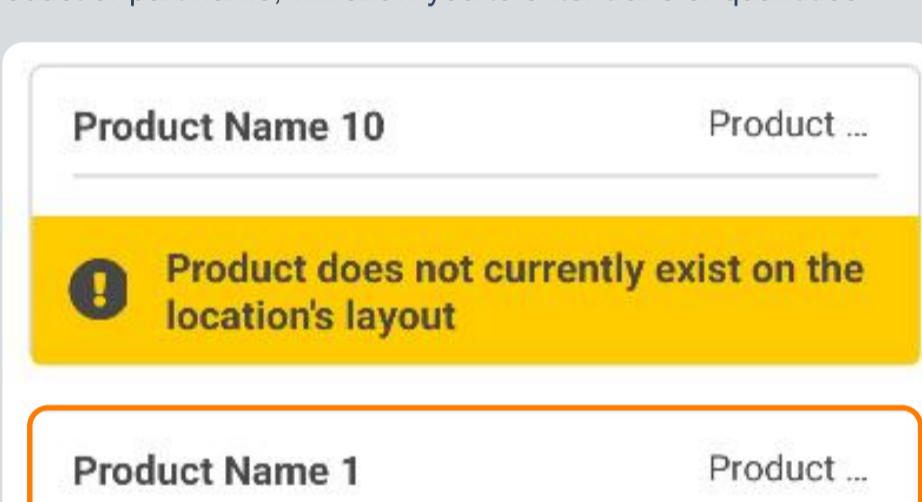
- Notification Bar:**
  - A yellow notification bar will appear next to each product or part that is not currently on the 'To' Location.
- Details of Notification:**
  - The notification will typically indicate that the product or part does not exist on the 'To' Location

You can review these notifications to ensure that all items are correctly accounted for in the transfer.



## Adding a Transfer Value for Products and Parts

Selecting the product or part name, will allow you to enter transfer quantities.



At the top of the screen, you can view:

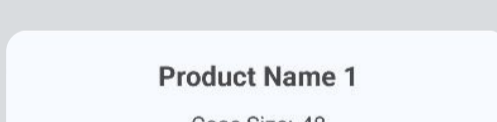
- Number of Products or Parts:**
  - Displays the total number of items available at the 'To' Location.
- Location Layout Order:**
  - Shows the layout order of the selected item, helping you understand its position within the location.



For each product or part in the stock transfer, you can view:

- Product/Part Name:**
  - The name of the product or part being transferred.
- Case Size:**
  - Indicates the number of units per case.
- Expected Cases and Singles:**
  - Expected Cases:** The number of cases anticipated in the 'From' Location.
  - Expected Singles:** The number of individual units anticipated in the 'From' Location.

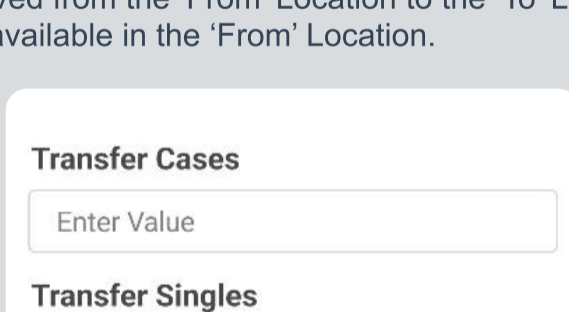
These values reflect the current stock levels in the 'From' Location and help ensure accurate stock transfer.



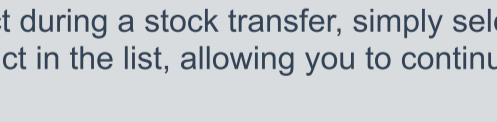
To transfer a product or part, enter Transfer Quantities

- Cases:** Specify the number of cases you want to transfer
- Singles:** Specify the number of individual units you want to transfer

These quantities will be moved from the 'From' Location to the 'To' Location. Ensure you only transfer quantities that are available in the 'From' Location.



To move on to the next product during a stock transfer, simply select the '>' icon. This will navigate you to the next product in the list, allowing you to continue entering or reviewing stock transfer data.

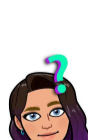


### Training Note

Once you have entered all the products or parts you wish to include in the stock transfer, you can use the Zeroise option to set all remaining items not included in the transfer to a quantity of 0.

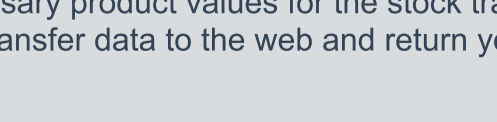
Here's how to do it:

- Complete Entries:** Ensure you've entered the transfer quantities for all relevant products or parts.
- Select Zeroise:** Click the Zeroise button. This action will automatically set the transfer quantities of any remaining products or parts (not already included in the transfer) to 0.



## Submit Stock Transfer

Once you've entered all necessary product values for the stock transfer, select **'Submit'**. This action will submit your stock transfer data to the web and return you to the search location screen.



### Training Note

Depending on your organisation's setup, your stock transfers might be submitted as 'Pending'. This means that the stock transfers will require review and approval from someone in the back office before the information is officially updated.

Once this has been completed by the back-office, you will receive a notification confirming that your pending stock transfer has been completed.

