

Stock Transfers

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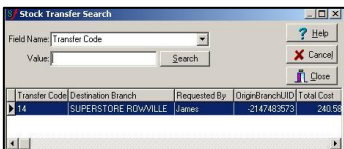
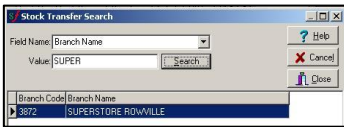
Category	Inventory
Course	Stock
Version	1.0
Client	Generic
Software	2.12.100

A stock transfer is performed to transfer stock between two locations, either warehouse-to-store or store-to-store.

Procedure to Record a Stock Transfer Out

Hints and Tips

- ✓ Don't know the **Destination Branch** code? Click to search for it by their branch name (or leave blank to retrieve all locations). Double-click the required store to add it and return to the transfer.
- ✓ Double-click in a blank **Code** row to search for a product by description.
 - Click **Contains** to broaden your search. Click **Advanced Search** for additional search options.
 - Select the required product to add it to the transfer.
- ✓ If you record a **Reference No.** and/or **Manual Docket No.**, this information doesn't display on the printed transfer slip.
- ✓ The stock on hand (SOH) is reduced at your location once you click **Save**.
- ✓ To retrieve a saved transfer, in the **Transfer Code** field click . Click **Search**. Double-click the required transfer to select it and return.
 - If you edit the transfer, it only adjusts SOH by the extra or fewer cases.



1.	From the BOS Tools menu, select Stock Functions , then Stock Transfer .	
2.	Make sure that the Transfer tab is selected.	
3.	In the Destination Branch field, type or search for the store number you're transferring the stock to.	
4.	In the Requested By field, type the person who requested the stock (if applicable).	
5.	Optionally enter a Reference No. , Manual Docket No. (if an internal transfer docket is used) and Comments related to this transfer.	
6.	Leave the Date field at the current date. <i>*You cannot select a future date.*</i>	
7.	In the next blank Code field, type, scan, or search for, the required product.	
8.	In the Quantity field, type the cases or cases.units being claimed. <i>*The system auto-populates a minus sign.*</i> <i>*To only transfer units (when CQ is greater than 1), change Unit to [1] so that the Quantity reflects units; check the Ext Qty (this is in units) is correct.*</i>	
9.	Repeat steps 7 and 8 to add more stock to the transfer.	
10.	Click Save .	
11.	Click Yes . <i>*A Transfer Code is assigned.*</i>	
12.	Click Yes . <i>*Send the printed transfer slip with the stock.*</i>	
13.	If: _____ then: _____ there are more return to step 3. transfers to create you're finished go to step 13.	
14.	Click Close .	
15.	The sender should sign their name at the bottom of the transfer slip.	

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Hints and Tips

✓ The transfer details are not communicated electronically between locations; you need to record the stock as a new receipt, so that SOH is updated.

✓ A transfer slip is sent with the stock. The staff member who takes delivery of the stock should sign their name at the bottom of the slip.

Sent by: _____	Received by: _____
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✓ Have the transfer slip that was sent with the stock in-front of you as you record the receipt.

✓ If you record a **Reference No.** and/or **Manual Docket No.**, this information doesn't display on the printed transfer slip receipt.

✓ The stock on hand (SOH) is increased at your location once you click **Save**.

✓ To retrieve a saved transfer receipt, in the **Transfer Code** field click . Click **Search**. Double-click the required transfer to select it and return.

- If you edit the transfer, it only adjusts SOH by the extra or fewer cases.

Procedure to Record a Stock Transfer In (Receipt)

1.	From the BOS Tools menu, select Stock Functions , then Stock Transfer .	
2.	Click the Receipt tab.	
3.	Click New .	
4.	In the Origin Branch field, type the location you're receiving the stock from. <i>*You must enter the Sending Store code listed on the Transfer Slip.*</i>	
5.	In the Transfer Code field, type the transfer code for the stock. <i>*This is located on the Transfer Slip; it's the digits in the IST number after the [F], e.g. 52.*</i>	
6.	In the Freight Cost field, enter any freight costs related to this transfer.	
7.	Leave the Date field at the current date. <i>*You cannot select a future date.*</i>	
8.	Optionally enter any Reference No. and Comments related to this transfer.	
9.	If an internal transfer docket was included with the stock, record the number in the Manual Docket No. field.	
10.	In the next blank Code field, type, scan, or click to search for, the product received.	
11.	In the Quantity field, type the cases or cases.units being claimed. <i>*To only transfer units (when CQ is greater than 1), change Unit to [1] so that the Quantity reflects units; check Ext Qty (this is in units) is correct.*</i>	
12.	Repeat steps 10 and 11 to add to the receipt.	
13.	Click Save .	
14.	Click Yes .	
15.	Click Yes if your store process requires a printout of the stock transfer receipt, or No to continue. <i>*The information should be a duplicate of the Transfer Slip that was sent with the stock.*</i>	
16.	If: there are more receipts to create then: return to step 3. you're finished go to step 17.	
17.	Click Close .	