Stock Transfer

Stock Transfer is a logistic process to transfer products' stock from one warehouse to another. Stock Transfer is generated from either Consignment Order (Sales module) or Warehouse Order (Purchase module) in Samooha. Document type of the Stock Transfer will be inherited from the source document (Consignment / Warehouse Order) as set up in the system.

After Stock Transfer is posted, system will generate Transfer Receipt for the receiving party to process stock receipt.

Below are available actions for the user from *"Stock Transfer"* view:

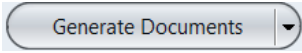   🔗 Process stock transfer and transfer receipt

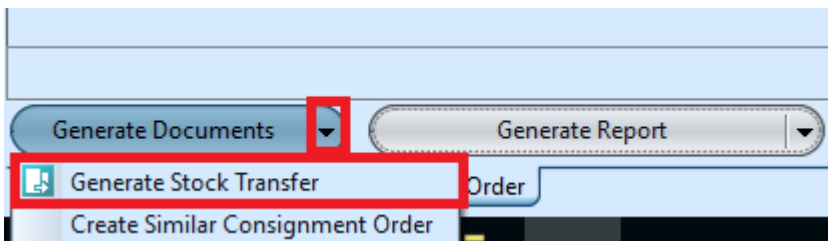   🔗 View and search for stock transfer details

Field Name	Explanations	Mandatory Information
Document Type	Type of the document	Y
Document Date	Creation date of the document	Y
Document Number	Document number of the stock transfer	Y
Reference Number	Code for easy reference search of the document	N
Branch	Name of company's branch which make the stock transfer	Y

From Warehouse	The source warehouse of the stock to be transfer	Y
To Warehouse	The destination warehouse of the stock to be transfer	Y
Requested By	Name of staff whom requested the stock transfer	N
Description	Additional information in regard to the stock transfer document	N
Product Brand	Select product brand(s) to filter products	N
Filter	Enter keyword(s) to filter / search for products	N
Product	Product code of the item	Y
Description	Description of the item	N
UOM	Type of the item (Unit of Measure)	Y
Quantity	Number of quantity of the item to transfer	Y
Unit Cost	Cost per item	Y
Line Total	Total cost for the transferred product	Y
Grand Total	Total cost for all the items on the stock transfer	Y

Process Stock Transfer and Transfer Receipt:

1. Open the approved *"**Consignment Order**"* (Sales module) or *"**Warehouse Order**"* (Purchase module) document to generate *"**Stock Transfer**"* for logistics

2. Click arrow on button and select *"**Generate Stock Transfer**"* option to generate a new *"**Stock Transfer**"* transaction (Inventory module – Logistics) to process the transfer order

3. Click on **"Confirm Stock Transfer"** button at the bottom left of screen to confirm the
stock transfer. A link to picking document will show up above "**Post Stock Transfer**" button after
the confirmation. The status on top right of the corresponding stock transfer document will show "**To Be Picked**"

4. Click on the picking document link to start picking process and then post the picking of the stock. User may modify the selected product batch before start picking.

5. Go back to the source document (Stock Transfer). The status on top right of the corresponding stock transfer document will be updated as "*Picked*"

6. Click on *"Post Stock Transfer"* button at the bottom of screen to post the stock transfer. A link to Transfer Receipt document will show up above *"Generate Report"* button after the posting. *"Postings"* tab will be automatically fill up with journal entries of the stock transfer

7. In Stock Transfer, click on **"Generate Button"** button at the bottom left of screen to generate the stock transfer report, a window will come up showing print report options. User can print report, export the report as pdf or excel, or preview the report

8. Click on the Transfer Receipt document link to open and process stock receipt

9. Click on "**Confirm Stock Receipt**" button to confirm that stock have been received by the receiving party

10. Click on **"Post Stock Receipt"** button at the bottom left of screen to post the Transfer Receipt. A link to Putaway document will show up above "**Generate Report**" button after the posting. "**Postings**" tab will be automatically fill up with journal entries of the Transfer Receipt

11. Confirm and post the Putaway of the transfer receipt at the receiving warehouse. The transferred stock are now available for use in the receiving warehouse.

View and Search for **Stock Transfer** Details:

1. Click on *"Stock Transfer List"* tab at the bottom of screen

2. Enter search parameter to filter the result, i.e. type in which warehouse to search for in the*"Warehouse"* text field box or select from drop-down list

3. Result can be sorted alphabetically by clicking
the fields' columns

4. Double click on stock transfer to view full
details of the document, it will bring up the details
on **"Stock Transfer"** tab for the
selected stock transfer