

Stock Transfers

Customer

Hey, I need another can of this paint, but I didn't see any on your shelf. Do you have some in the back?

Clerk

Hmmmm – Let me check our inventory.

I'm sorry, we don't, but I can transfer it from another store and have it here tomorrow, then call you when it arrives.

Will that work?

Customer

Yes, that will be fine.

Narrator

Creating stock transfers helps you meet your customer's needs promptly.

Select a topic and we'll show you some options for creating them.

Topics

- Create a New Stock Transfer
- Send and Receive Stock Transfers
- Create Stock Transfers from a Sales Order

Create a New Stock Transfer

Let's look at how to create a stock transfer from another store to yours.

Select Stock Transfer from the Home tab.

Enter or select the Transfer From Branch. The To Branch defaults to the current location.

Set the Sale type to Picked Up or Delivered.

Enter the Date required and Date Requested.

Add the product you want to transfer.

Enter the quantity to transfer and then choose OK.

Use these buttons to add more information or add and delete lines.

When you are done, select Complete.

A best practice is to set the system option to require approval by the sending branch on transfers created at the receiving branch.

The transfer stays in a parked status until the sending branch approves it.

This does not apply to transfers linked to sales orders.

Select Ok to clear the message.

Send and Receive Stock Transfers

Here's how to send and receive a stock transfer from Order Monitor.

Set the Filter to Transfers for Approval and the Branch to the sending branch.

Then enter the transfer number and select Go.

Select the transfer you want to approve, and then choose Approve in the ribbon.

Select Yes on the warning window.

Now change the Filter to Transfers To Be Sent and enter the transfer number.

The transfer Status is Picking.

Mark it as picked and delivered or picked up like a sales order.

Right-click the line and choose Mark Delivered.

Select Yes when prompted to mark it picked at the same time.

When you mark the transfer as delivered or picked up, BisTrack automatically enables the Send transfer checkbox.

Select OK.

Follow the prompts to print the stock transfer.

Notice that the Status changes to To Be Received.

Once the goods arrive at the receiving branch, use Order Monitor to receive the transfer.

Set the Filter to Transfers To Be Received and select Go.

Select the transfer and open the right-click menu.

Choose Receive Transfer.

Select Yes to confirm.

BisTrack completes the transfer and updates the available stock.

Create Stock Transfers from a Sales Order

Sometimes your location doesn't have enough stock on hand, but another branch does.

Use BisTrack to create a transfer within a sales order to move that inventory to the location that needs it.

You've taken Joe's order and realize that you don't have enough on hand.

An easy way to manage this is to first select the General tab in the Order Line Properties window.

Then select Options which opens the Order Line Stock Options window.

In the What would you like to do with this order line? section, choose an option from the drop-down menu.

Then choose an option for how many to transfer and from where.

Notice that the Where from? locations show how many are available at each.

Enter the Date required.

When finished, select OK.

Notice that BisTrack added a T icon to the line. This shows that the entire order is coming from a stock transfer.

Enter more items as necessary and complete the order as you normally would.

BisTrack creates the stock transfer and gives it a number.

You might want to write this number down for reference later.

Select OK when you're finished and follow the steps from the last section to send and receive the transfer.

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