# How to transfer stock

#### Transferring stock in AX

1. Go to Stock and warehouse management > Journals > Item transactions > Transfer

G C V E + PLA + Stock and	ea (FLASHARTESTERY) Sestion (L. * ET * The FLAGUELING PLASHARTESTERY (MISSIGNER/CRUP)			47
File 👻				
Ferourites     My Favourites     My Favourites     Stock and warehouse management     Area page     Common     Common     Journals     Inquiries     Reports     Periodic     Setup	Common On-hand stock Locations Bills of materials Signments Picking routes Sates pickup Formula Pomelt strafers Update MTD Item Weight	^ .	Journals Item transactions Movement Stock adjustment Tranfer Bills of materials Item anival Item anival Item counting Counting	
	Inquiries [On-hand] Counting Netroy Output orders Carrier reasochoin formation Carrier reasochoin formation Carrier reasochoin formation Carrier reasochoin formation Carrier reasochoin formation Standard cost transactions Standard cost transactions	^	Tag counting  Reports  Packing material weight - purchase Packing material weight - sales Packing material re calculation Base dat  Quantity setup Picking locations Item prices Indirect cost rate and ratio	

# 2. Click New

🛒 Tra	ansfer (1 - pla) - Jo	urnal: STJ-1218	87, Stock	transfer journal, Posted	: NoJournal type: Transfer	— C	X C
File	👻 🔆 New	🗙 Delete	🚟 Line	es 🧹 Validate 🛛 🕌	Post Create new Lo	g »	
Show:	Open ~						
Ove	rview General Se	etup Blockir	ng Histo	ry			
	Name	Journal		Description	Modified date and time	Modified by	Creater
	•		•	•	•	•	
	Stk_Trans	STJ-121887		Stock transfer journal	00:00:00		
	Stk_Trans	STJ-121888		Stock transfer journal	00:00:00		
	Stk_Trans	STJ-121889		Stock transfer journal	00:00:00		
	Stk_Trans	STJ-121916		Stock transfer journal	00:00:00		
	Stk_Trans	STJ-122501		Stock transfer journal	00:00:00		
<							>
Ē	lde 🔔(1088	901) GBP (	JSR Mode	el pla initial 12/01/	2022 AX2012CopyofLive	98	Close

🌉 Tra	nsfer (1 - pla)	- Posted: NoJourr	al type: Tr	ansfer, New Record		_	
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		✓ STJ-122671			00:00:0	00	
	Name	Description		er journal	00:00:0	00	
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	Stk Trans	Stock transfer io	urnal	er journal	00:00:0	00	
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		,			/····/////////////////////////////////		

# 3. In the Name dropdown select Stk\_Trans

4. Now click on Lines

🏹 Ті	ransfer (1 - pla) - Po	sted: NoJournal type:	Transfer, New Record		- 0	$\times$
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Show	: Open V erview General Se	etup Blocking His	tory			
	Name	Journal	Description	Modified date and time	Modified by	Create
	•		· ·	•	•	
	βtk_Trans ∨	STJ-122671	Stock transfer journal	00:00:00		
	Stk_Trans	STJ-121887	Stock transfer journal	00:00:00		
	Stk_Trans	STJ-121888	Stock transfer journal	00:00:00		
	Stk_Trans	STJ-121889	Stock transfer journal	00:00:00		
	Stk_Trans	STJ-121916	Stock transfer journal	00:00:00		
	Stk_Trans	STJ-122501	Stock transfer journal	00:00:00		
<						>
Ø	Ide (1088	901) GBP USR Mo	del pla initial 12/01/	2022 AX2012CopyofLive		lose
5.	Enter the ite	m number to be t	ransferred and the	quantity		

Note:- the quantity should always be a negative number

🧾 J	ournal lines, stock (1 - J	pla) - Journal: STJ-122671,	New Record					_		×
File	🗸 😽 New 🗡	Colete Validate	Post Log	Fun	tions▼ Stock▼					?
Ov	erview General Finar	ncial dimension Stock di	mensions							
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	-	*	•							
	12/01/2022	PCH972	-40.00							
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	Image:	Create a	(1088901	) GB	P USR Model pla initial	12/01/2022 AX2012CopyofL	ive 🗐	8	Close	

6. Now click on the Stock dimensions tab

j 🕎	ournal lin	es, stock	: (1 - p	la) - Journ	al: STJ-	122671,	New Record	ł								-			×
File	- [	🔆 New	X	Delete	Vali	date F	Post Log	Fur	octions 🔻	Stock ▼									?
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	12/01/2	2022		PCH972			-40.00		1										
																			_
◄	< Ⅲ			2	Crea	te a	<b>(10889</b>	01) GE	3P USR N	lodel pla	initial	12/01/2022	AX20120	opyofLive	3		Cle	ose	

7. In the left hand column populate the warehouse, batch number and location you are moving. In the right hand column populate the warehouse and location you are moving the item to. In the batch number filed you should enter the same batch number selected in the left hand field

🙀 Journal lines, stock (1 - pla) - Jour	nal: STJ-122671, New Record	_		×
File 👻 🔆 New 🗡 Delete	Validate Post Log Functions▼ Stock▼			?
Overview General Financial dime	nsion Stock dimensions			
From stock dimensions	To stock dimensions			
Configuration:	Configuration:			
Size:	Size:			
Colour:	Colour:			
Style:	Style:			
Site: PLAHAST 🗸	Site: PLAHAST 🗸			
Warehouse: 45 🗸	Warehouse: 82 🗸			
Batch number 4245 V	Batch number: 4245			
Location: BAY10 🗸	Location: 82			
Serial number:	Serial number:			
K < III > >   🖉 🖺	Descripti   🌲 (1088901)   GBP   USR Model   pla   initial   12/01/2022   AX2012CopyofLive   🚍	8	Close	

### 8. Click on the Overview tab

🙀 Journal lines, stock (1 - pla) - Jour	nal: STJ-122671, Ne	w Record	-		Х
File 👻 🔆 New 🗡 Delete	Validate Po	st Log Functions▼ Stock▼			] 🤅
Overview General Financial dime	nsion Stock dim	ensions			
From stock dimensions	To stock dimer	sions			
Configuration:	Configuration:				
Size:	Size:				
Colour:	Colour:				
Style:	Style:				
Site: PLAHAST 🗸	Site:	PLAHAST ~			
Warehouse: 45 🗸	Warehouse:	82 🗸			
Batch number: 4245 🗸	Batch number:	4245 ~			
Location: BAY10 🗸	Location:	82 🗸			
Serial number:	Serial number:				
I I I I I I I I I I I I I I I I I I I	Descripti 💪	(1088901)   GBP   USR Model   pla   initial   12/01/2022   AX2012CopyofLive   🚍	8	Close	:

9. If you are transferring more than one item click on New or press the down arrow to create a new journal line. Then repeat steps 5-8.

<b>1</b>	lournal lines, stock (1	l - pla) - Journal: STJ-1220	671, New Record		-		>	×
File	🔹 👻 🔆 New	🗙 Delete 🛛 Validate	Post Log	Fun	ctions▼ Stock▼			(
Ov	verview General Fi	nancial dimension Stoo	k dimensions					
	Date	ltem number	Quantity	Log				
		•	• •					
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10. Once you have finished adding all the items you want to transfer click on Post

🕎 Jo	urnal	lines, stoc	k (1 - p	la) - Journal:	STJ-122671,	New Record			_		×
File	•	🔆 New	X	Delete	Validate	Post Log	Fun	actions▼ Stock▼			?
Ove	rview	General	Finan	cial dimensio	n Stock di	imensions					
	Date			ltem numb	er	Quantity	Log				
			*		•	•					
	12/0	1/2022		PCH972		-40.00					
				🖉 💾 т	ransacti	<b>(108890</b>	1) GE	BP USR Model pla initial 12/01/2022 AX2012CopyofLive 🗐	8	Close	

# 11. Click OK on the popup window

Microsoft Dynamics AX (1)	_		×
Post journal STJ-122671.			
General Batch			
Transfer all posting errors to a new journal:			
	OK	Cancel	
Place a checkmark if you want to transfer defective lines/voucher to a new j	journal.		

12. If it is successful a popup window saying the journal has been posted will appear, then click Close

🛄 Info	log (1)	_		×
į	The following message information and do no action.	es are just fo ot require yo	r your u to take	any
<b>2 Pc 1 1 1 1 1 1 1 1 1 1</b>	osting - Journal Journal: STJ-122671 	osted.		
		Clear	С	lose

## Transferring stock in RF Smart Web Client

1. In the Water Treatment menu select Transfer



Note:- The menu will then display a number of different transfer scenarios where

parameters have been predefined to make the process as quick as possible.

In all scenarios the warehouse from and to will be prepopulated on the journal and For transfers to and from warehouse 41 and 82 the location will also be prepopulated as both warehouse only have one location. And for warehouse 40 all inbound movements will be put in to location WATER

For other scenarios such as transfer from and to warehouse 45 you will also have to scan/key the locations as well as the item and batch number barcodes.

*For the purpose of this training document we will transfer stock from warehouse 41 to 45* 

#### 2. Select the transfer option WH41 to WH45



3. Scan or key the item number. Press enter

From location	
Item	٦
Post Review	

4. Scan or key the item batch number. Press enter

From location
22
Item number
PCH028
1kg Trichlor tablets in UN approved pot with cyan lid
Batch number
148533
Post Review

5. Enter the quantity to be transferred, then press Enter

*Note:- the screen will display the maximum amount of unreserved stock available to be moved* 

From location
22
Item number
PCH028
1kg Trichlor tablets in UN approved pot with cyan lid
Physical stock
3960
Item
Quantity
2000
Post Review
Post Review

6. Scan of key the location you are moving the item to, then press Enter

## From location

22
----

# ltem number

PCH028 1kg Trichlor tablets in UN approved pot with cyan lid

To locatio	n			
BAY06				
Quantity	Post	Review	Empty	Details

7. The Screen will then display a Success message, click on Back to go back to the transfer menu

Back
From location
Item Post Review
Success

Transferring stock in RF Smart using a hand held device (Gun)

1. Select Transfer from the Water Treatment menu



*Note:-* The menu will then display a number of different transfer scenarios where parameters have been predefined to make the process as quick as possible.

In all scenarios the warehouse from and to will be prepopulated on the journal and For transfers to and from warehouse 41 and 82 the location will also be prepopulated as both warehouse only have one location. And for warehouse 40 all inbound movements will be put in to location WATER

For other scenarios such as transfer from and to warehouse 45 you will also have to scan/key the locations as well as the item and batch number barcodes.

*For the purpose of this training document we will transfer stock from warehouse 41 to 45* 

2. Select the option WH41 to WH45

rfs Telnet	Simulator		_		×
Menu Di	splay				
RF-	SMAF	RT Mei	nu		
7.2-	Trar	nsfer			
7.2.	1 -	WH45	Мот	7e G	S
7.2.	2 -	WH45	to	WH4	0
7.2.	3 -	WH45	to	WH4	1
7.2.	4 -	WH45	to	WH8	2
7.2.	5 -	WH82	to	WH4	5
7.2.	6 -	WH82	to	WH4	1
7.2.	7 –	WH82	to	WH4	0
7.2.	8 -	WH41	to	WH4	5
7.2.	9 -	WH41	to	WH8	2
Dani	el.S	Sawye	r -	pla	
					.::

3. Scan the item barcode, the screen will move to the next page. If you have to key the item number press Enter when complete



4. Scan the batch number

```
Telnet Simulator – – ×

Menu Display

<u>Transfer journal</u>

From location

22

Item number

PCH105

SDIC 56% Granules h

Batch number

130532212-347_
```

5. Enter quantity to be transferred

rfs Telnet Simulator	—	×
Menu Display		
Transfer	journa	1
From locati	on	
22		
Item number		
PCH105		
SDIC 56% G	Sranule;	s h
Physical st	ock	
16000	kg	
Quantity		
500_		
_		

6. Scan location the item is being transferred to

```
Telnet Simulator – – ×

Menu Display

<u>Transfer journal</u>

From location

22

Item number

PCH105

SDIC 56% Granules h

To location

BAY10_
```

7. A success message will appear on the screen, press F3 to exit out of the transfer journal

