

Transfers

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What is a transfer & Why do we use them?

A transfer is used to move stock from one unit to another. Stock will be delivered into an outlet (i.e. the cellar). These items would then have to be moved to the outlet/unit in order for them to be sold/used. To have to stock in these areas, a transfer must be completed on the system. This means that when completing a stock take, true results for every outlet can be given. Any risk outlets/units can be identified and investigated, as long as all transfers have been completed fully and truthfully.

transfer

verb

3rd person present: transfers

/trans'fə:,trɑ:ns'fə:,tranz'fə:,trɑ:nz'fə:

make over the possession of (property, a right, or a responsibility) to another.

"we will transfer full planning responsibility to local authorities"

How to Complete a Transfer

To complete a transfer, navigate to the transfer tab on the left-hand side of the page. Then select 'Start Transfer' on the top right-hand side. From the pop up, select the outlet where the stock is coming from, where the stock is going, the date of the transfer and a reference in order to be able to identify the transfer from a glance.

Start Transfer ✕

From Outlet

To Outlet

Transfer Date

Reference

Start

When you press 'Start' it will bring up a list of all products that are held in the outlet you are moving stock from. Use the search function at the top of the page to find the items of stock that need to be moved. Within this product list, it will show the quantities of products that are in the outlet. You will only be able to move stock from this outlet if there is stock available. If you enter a value greater than what is in stock, the 'Save' button will disappear. Once the correct value is entered, you will be able to click 'save' at the bottom of the page. This will send the transfer across to the opposing outlet to approve.

Save

Save & Approve

Delete Transfer

When completing a transfer, you can choose which Stock Group the stock is being transferred from. For example, this can be Beverage stock or Food stock. To change the group, simply go to the 'Stock Group' drop down in the top left hand corner and select the correct group.

Stock Group

Beverage



Beverage

Food

All

Approving a Transfer

To approve a transfer, return to the Transfer Summary page and click 'View' on the relevant transfer.

Awaiting Approval Transfers

From	To	Reference	Date	Action
Cellar	Library	haydn	Dec 18, 2019	Continue View

On this pop up, you are able to review what products have been requested.

Transfer from Cellar to Library

×

Transfer Date: Dec 18, 2019

Transfer Reference: haydn

Approve Transfer

Filter

Product	Size	Single Cost	Quantity	Total Cost
Whisky Jack Daniels	70cl	0.00	5	0.00
Total				0.00

Once the transfer has been reviewed, you can approve the transfer at the top of the pop up.

Transfer from Cellar to Library



Transfer Date: Dec 18, 2019

Transfer Reference: haydn

Approve Transfer



Filter

Product	Size	Single Cost	Quantity	Total Cost
Whisky Jack Daniels	70cl	0.00	5	0.00
Total				0.00

This transfer will then appear in the 'completed transfers' section of the Summary page.

Completed Transfers

From	To	Reference	Date	Value	Action
Cellar	Library	haydn	Dec 18, 2019	356.52	View

Deleting a Transfer

To delete a transfer, go to the Transfer Summary page and select 'View' on the relevant delivery.

Awaiting Approval Transfers

From	To	Internal Reference	Date	Action
Main Bar (The Mended Drum)	Cellar (Unseen University)		Mar 25, 2021	View

At the bottom of this pop up, there will be an 'Unapprove Transfer' button. This will then delete the relevant transfer from having an impact on the stock holding. This transfer will now appear in the 'Deleted Transfer' section of the summary page.

Transfer Date: Mar 25, 2021

[Unapprove Transfer](#)

Filter

Product	Size	Single Cost	Quantity	Total Cost
Whisky Jack Daniels Honey	70cl	12.50	1	12.50
Total				12.50

The transferring site will then see this transfer within their own system and can amend/delete where necessary

Deleted Transfers

From	To	Internal Reference	Date	Action
Cellar	Main Bar	awaiting approval	Feb 26, 2020	View