



EVANTAGE SOLUTIONS SDN BHD

Computerized Maintenance Management System (CMMS)

USER MANUAL
(Transfer Transaction)

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DOCUMENT CONTROL

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Revision No	Revision Date	By	Description of Changes
1.0	20/06/2024	Najmi	First Version of User Manual – Transfer Transaction

Scenario

A corporation has multiple storage location and plant. Example, Plant A need stock A from the Plant B. In this syllabus, we will guide on how to transfer transaction in CMMS Web Core.

1. Add New Location

What it's for

The process of relocating inventory, assets, or responsibilities within an organization, ensuring accurate tracking and documentation of the movement.

Add second location for stock

- 1.1 On the left of the system, click on **Spare Parts > Inventory Master**.

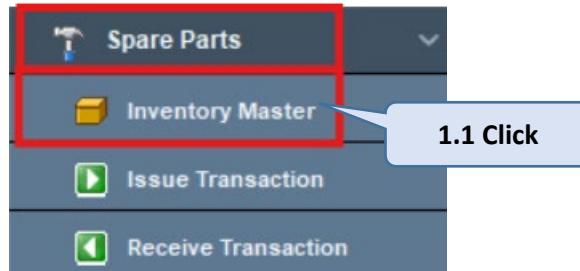


Figure 1.1

- 1.2 Click on the **Define** button to search for the stock.

- 1.3 Fill in the define criteria:

Field Name	: Stock No
Operator	: like
Value	: <Stock No>

- 1.4 Click the **Retrieve** button to retrieve the result.

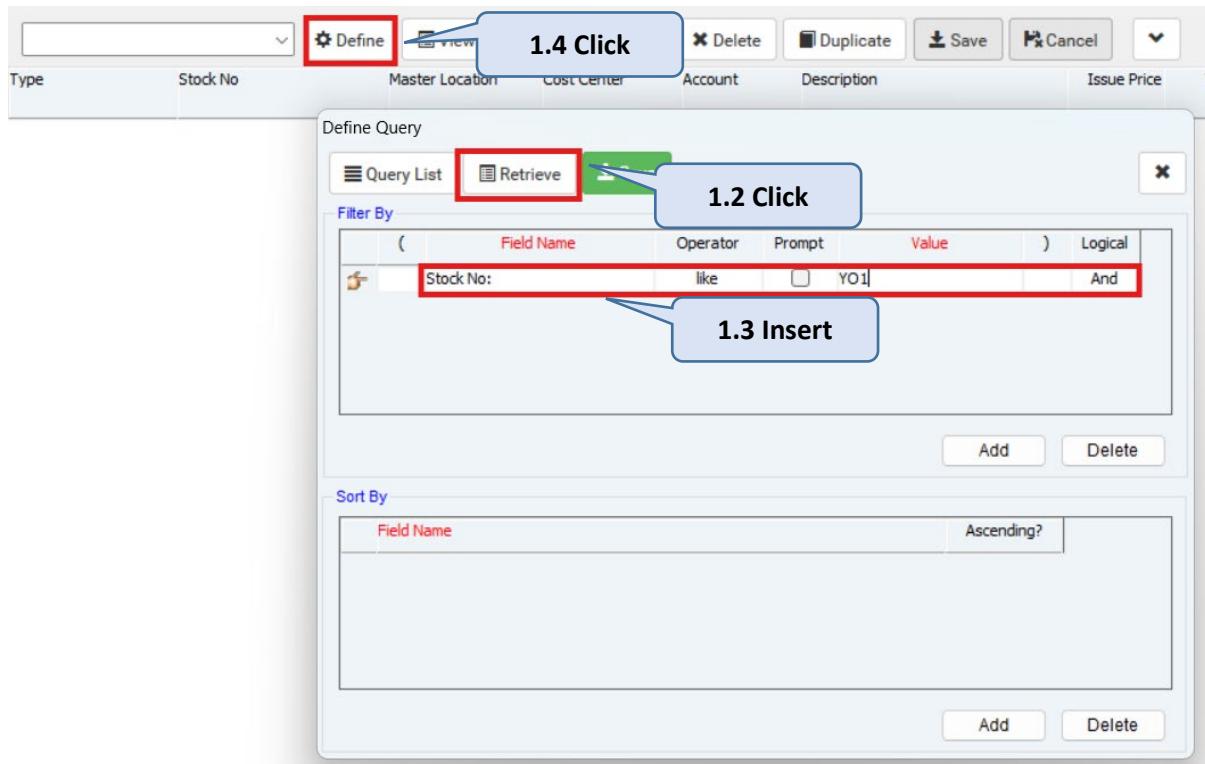


Figure 1.2

1.5 Click the **Edit** button to edit the stock information.

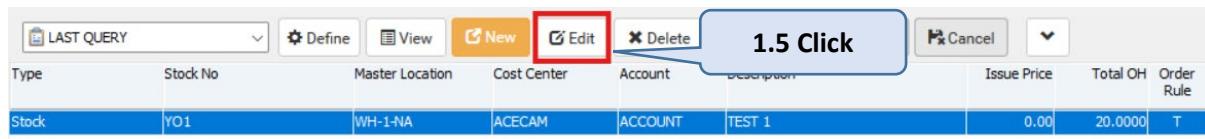


Figure 1.3

1.6 Click the **Location** subtab to open the location line.

1.7 Click the **Add** button to add another storage location.

1.8 Fill in the mandatory field:

Field	Value	Have Master File?
Master Location	: WO-2-WO	YES

(Note: Master file are control by System Admin).

1.9 If the new location is the main storage location, tick the “Primary Location” to change.

1.10 Click the **Save** button to save the information.

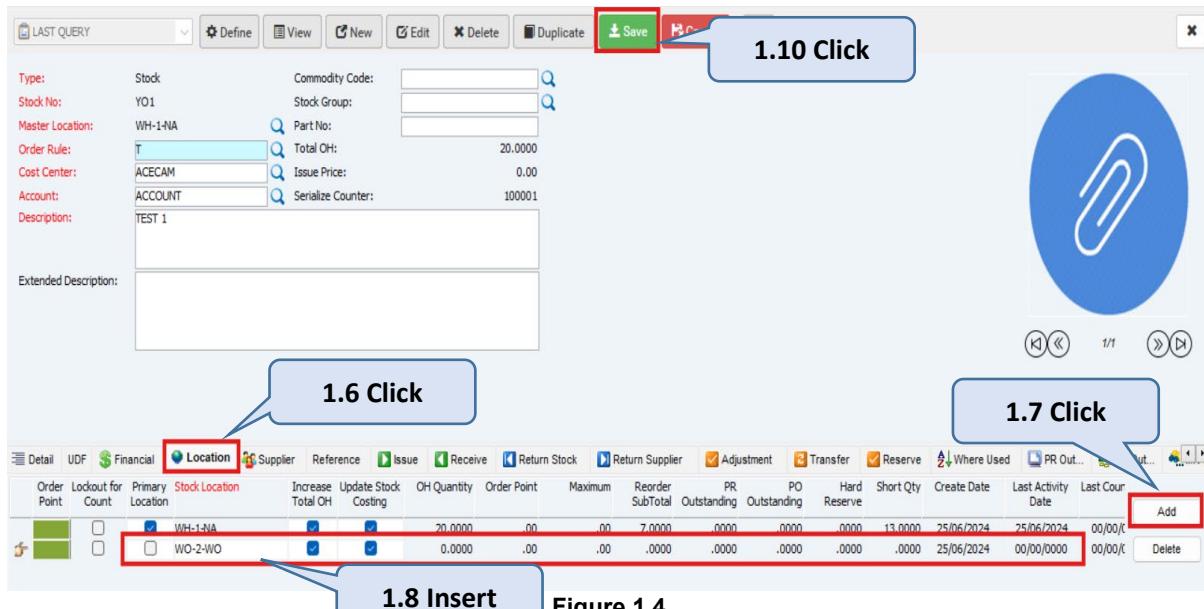


Figure 1.4

2. Transfer Transaction

Transfer stock

2.1 On the left of the system, click on **Spare Parts > Transfer Transaction**.

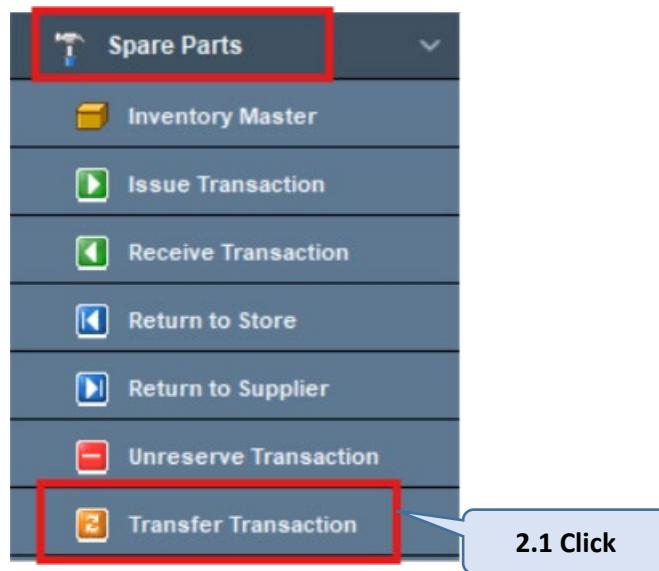


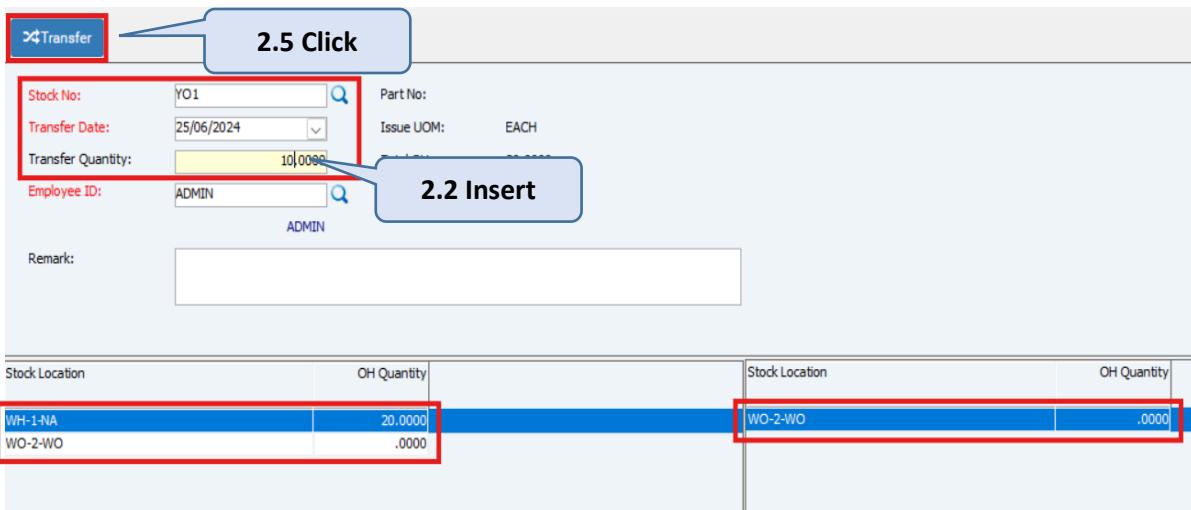
Figure 2.1

2.2 Fill in the mandatory field:

Field	Value	Have Master File?
Stock No	: <Stock No>	YES
Transfer Quantity	: 10	NO
Remark	: <Any Remark>	NO

(Note: Master file are control by System Admin).

- 2.3 On the left-hand side, it will show the stock location that has been added previously with the total on hand in the location.
- 2.4 On the right-hand side is the new location that want to be transfer. Lets make an example whereby to transfer the stock location from WH-1-NA to new stock location at WO-2-WO.
- 2.5 Click on **Transfer** button to transfer the stock.



The screenshot shows the 'Transfer' screen. At the top left is a red box around the 'Transfer' button. A blue callout bubble labeled '2.5 Click' points to this button. Below the button is a form with fields: Stock No: YO1, Transfer Date: 25/06/2024, Transfer Quantity: 10.0000, Employee ID: ADMIN. A blue callout bubble labeled '2.2 Insert' points to the Transfer Quantity field. Below the form is a table with two rows. The first row has 'WH-1-NA' in the Stock Location column and '20.0000' in the OH Quantity column. The second row has 'WO-2-WO' in the Stock Location column and '.0000' in the OH Quantity column. Both rows are highlighted with a red box. A blue callout bubble labeled '2.2 Insert' also points to the second row.

Figure 2.2

- 2.6 A prompt message stated that the transfer transaction has successful. Click **OK** to continue.

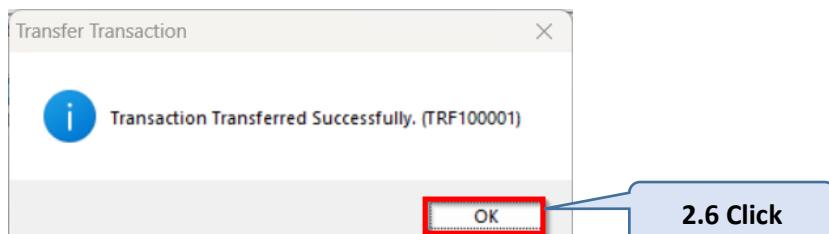
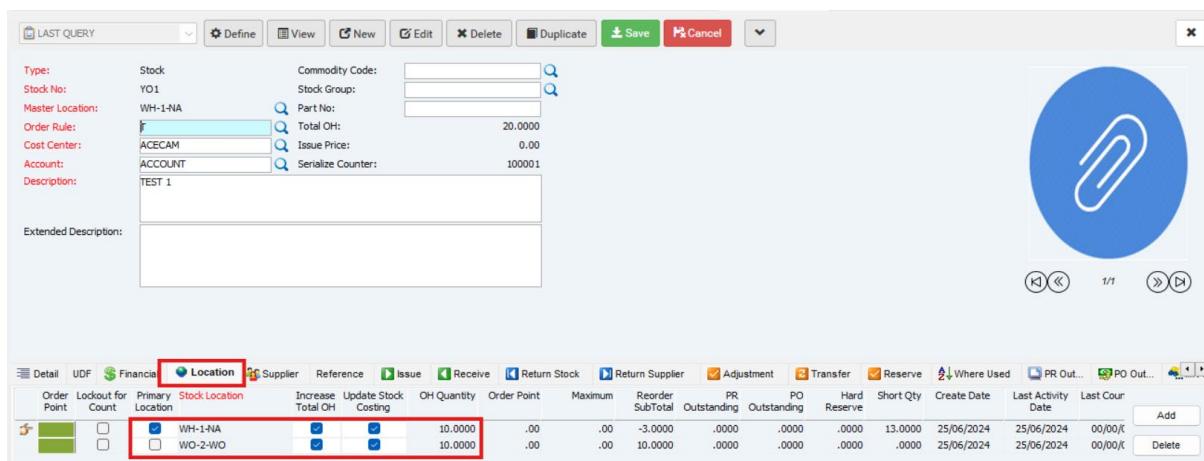


Figure 2.3

- 2.7 To check the current total OH, at the stock information in can be seen that the new stock location has receive the item.



The screenshot shows the 'Stock Information' screen. At the top left is a red box around the 'Location' tab. Below the tabs is a table with columns: Order Point, Lockout for Location, Primary Stock Location, Increase Total OH, Update Stock Costing, OH Quantity, Order Point, Maximum, Reorder SubTotal, PR Outstanding, PO Outstanding, Hard Reserve, Short Qty, Create Date, Last Activity Date, and Last Curr. The 'Primary Stock Location' column shows 'WH-1-NA' and 'WO-2-WO' with '10.0000' OH Quantity. A red box highlights this row. A blue callout bubble labeled '2.6 Click' points to the 'Location' tab.

Figure 2.4

2.8 The history of transfer can be seen by click on the **Transfer** subtab.

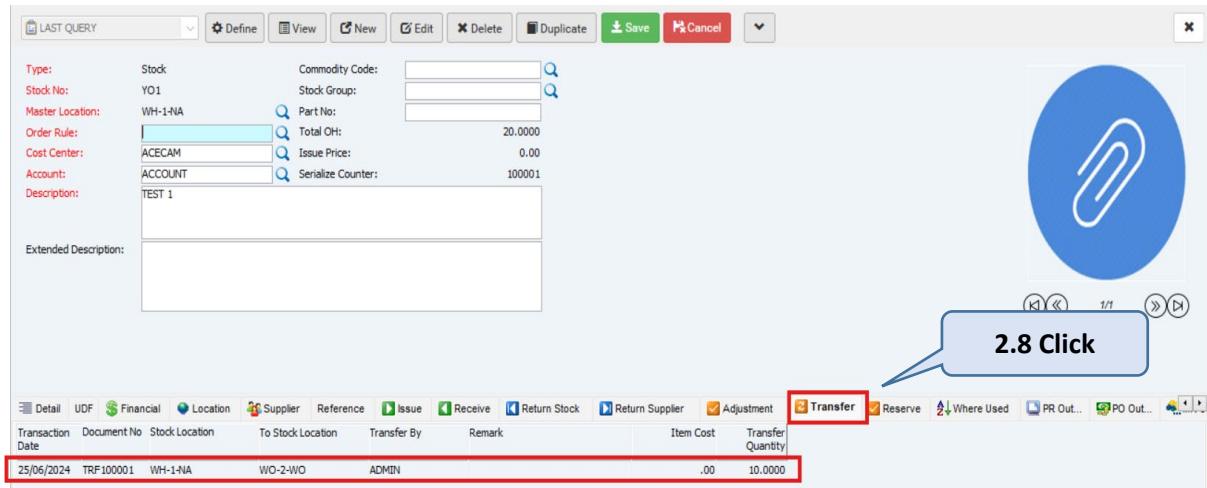


Figure 2.5