SHERKETYERP

Configure inventory overview and transfers

September 15, 2026

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Inventory transfers and related records

Inventory transfers move goods between warehouses or companies. Returns record goods coming back,
destruction certificates record goods approved for scrapping, batch transfers group operations, and
landed costs add shipment, insurance, or customs costs to product cost.

Use this page when you need to control access to these records, choose the correct route, or explain
why an action is unavailable. For the operational procedures, use **Inventory** transfers and returns.

If you need to…	Go to
Open the dashboard and choose an inventory perspective	Understand the inventory surfaces
Check access and record state before starting	Before you start
Find a saved transfer, return, batch, or landed-cost record	Find and open an inventory record
Progress an inter-company or batch transfer	Manage transfers and batches
Process a return or destruction certificate	Process returns and destruction
Compute or validate landed costs	**Compute** and validate landed costs
Choose a state- or access-dependent route	Handle access and state-dependent branches
Investigate an unavailable action or confirmation	Troubleshoot an unavailable or unexpected surface
Continue with warehouse setup	Configure warehouses and replenishment
Review inventory movement and valuation reports	Configure inventory reporting

If you need to…	Go to
Get help with a route or access problem	Getting help

Before you start

Access and record state determine which inventory actions you can use. Prepare the record's source
information before you open it, because the available actions change as the record progresses.

Prerequisites

Check	What to have ready	Why it matters
Access	**Inventory** access for the dashboard and transfer access for **Inter-Company Transfers**	The menu and transfer record depend on these access groups.
Return authority	Returns-manager access for **Process Return**	Processing a received return is restricted to the returns-manager group.
Destruction authority	Returns-manager access for **Approve & Destroy**	**Destruction** approval is restricted to the returns-manager group.
Landed-cost authority	Stock-manager access for **Valuation**	The valuation action requires stock-manager access.
Transfer state	`draft` for entering transfer details; `sent` for receiving a two-step transfer; `done` for settlement or return	The transfer header changes with the transfer mode and state.
Return state	`draft` , `confirmed` , `received` , or `processed` , depending on the next return action	Each return action is available at a particular stage.
Destruction state	`draft` before approval and `approved` before completion	The certificate actions follow these stages.
Batch state	`draft` or `in_progress` , depending on the next batch action	Batch confirmation, availability checks, and validation use these states.
Landed-cost state	`draft` before computation or validation; `done` for valuation	Cost entry is editable before completion and valuation follows completion.

Check the values and optional fields shown on your screen before proceeding.

With access and state ready, find the inventory destination that matches the work.

Find and open an inventory record

An inventory list is the starting point for opening a saved transfer, return, destruction certificate, landed-cost record, or batch transfer. Use the list's search and grouping choices to
narrow the records before opening one.

Prerequisites

- You have the access needed for the inventory destination.
- You know whether you are looking for a receipt, return, destruction certificate, inter-company
  transfer, landed cost, or batch transfer.

Steps

1. Open **Inventory**.
2. Choose the destination that matches your work.

If you need to…	Choose
Review incoming goods	**Receipts**
Review a customer return	**All Returns**
Review goods awaiting destruction	**Destruction Certificates**
Review a movement between companies	**Inter-Company Transfers**
Review additional costs assigned to stock	**Landed Costs**
Review grouped operations	**Batch Transfers**
Review operation-type cards	**Inventory Overview**

3. Use the list's search or filter area to narrow the records.

Record	Filters and groupings
Returns	Use the Status and Date filters; group by Status or Date
Destruction Certificates	Use the Status and Date filters; group by Status or Date
Inter-Company Transfers	Draft, In Transit, Done, or Open المديونية; group by From Company, To Company, or Status

Record	Filters and groupings
Batch Transfers	To Do, My Transfers, Draft, In Progress, or Done; group by Responsible or State
Landed Costs	Draft, Done, or Date; group by Status or Date

4. Open the matching record.

Result: The selected dashboard, list, or record opens for the next task.

Use the record's fields and panels to choose the procedure that follows.

Understand the inventory surfaces

The **Inventory Overview** dashboard is a set of role-based views. A transfer, return, destruction certificate, batch transfer, or landed-cost record is a business record with header information, detail rows, state controls, and—where applicable—additional panels.

The dashboard perspectives are Warehouse manager, Buyer / planner, Ops director, and CFO / finance. The manager view includes On-hand value, Items below minimum, Open transfers, **Operations** today, Forecast, All items below minimum, **Inventory** value by product, Live activity, and Open operations. The buyer view includes Stockout-risk SKUs, Avg days of cover, Open POs, Drafts ready, Reorder queue, Vendor performance · last 90 days, and Open POs · ETA timeline. The operations view includes Throughput, On-time delivery, Avg WIP age, Work-in-progress, and Open exceptions. The finance view includes Cash trapped in inventory, Days inventory outstanding, Dead stock, Slow movers, In transit, **Inventory** aging buckets · what's stuck and for how long, Cost of goods shipped · monthly, **Valuation** by warehouse, and Top capital tied up.

The record surfaces use these areas:

Surface	What you work with
Inter-Company Transfers	**Transfer Mode**, Date, **Warehouse From**, **Warehouse To**, and detail quantities including **Quantity Sent**, **Quantity Received**, **Quantity In Transit**, and **Quantity Returned**

Surface	What you work with
Returns	**Products** and **Notes**
Destruction Certificates	**Items to Destroy**
Batch Transfers	Responsible, Operation Type, Company, Scheduled Date, Detailed Operations, Operations, and Transfers
Landed Costs	**Landed Cost**, Date, **Journal**, **Company**, **Account Move**, **Vendor Bill**, **Additional Costs**, and **Valuation Adjustments**

In the return product lines, work with **Product**, **Quantity**, Unit of Measure, Lot/Serial Number, Reason, and Notes. In Items to Destroy, work with **Product**, **Quantity**, Unit of Measure, Lot/Serial Number, Reason, Unit Value, Total Value, and Notes. In Additional Costs, work with Product, Name, Account, Split Method, and **Unit Price**. In **Valuation Adjustments**, work with **Cost Line**, **Product**, **Weight**, **Volume**, **Quantity**, **Former Cost**, **Final Cost**, and **Additional Landed Cost**.

Manage transfers and batches

Use the transfer procedure for company-to-company movement and the batch procedure for grouped operations.

Create or progress an inter-company transfer

Prerequisites

- You have access to **Inter-Company Transfers**.
- The transfer is in the state required by the action you need.
- For a new transfer, you know the transfer mode, date, source warehouse, destination warehouse, products, quantities, units of measure, and unit costs.

Steps

1. Open or create the inter-company transfer record.
2. Enter **Transfer Mode**, Date, **Warehouse From**, and **Warehouse To**.
3. Add the products and enter **Unit of Measure**, **Quantity**, and Unit Cost in the detail lines.
4. Choose the path that matches the transfer mode and state.

If the transfer is…	Select
A draft one-step transfer	**Confirm**
A draft two-step transfer	**تسليم — Send**
A sent two-step transfer	**استلام — Receive**
Done and not settled	**Register Settlement**
Done and you need to send goods back	**إرجاع — Return**
A draft you need to stop	**Cancel**

Result: The transfer moves to the state associated with the selected path, or the applicable
settlement or return action opens.

Progress a batch transfer

Prerequisites

- The batch is in `draft` or `in_progress`.
- You know whether availability must be checked before validation.

Steps

1. Open the batch transfer.
2. Review Responsible, **Operation Type**, **Company**, and **Scheduled Date**.
3. Review the **Transfers** panel and its included operations.
4. Select the action that matches the batch state and availability.

If you need to…	Select
Start a draft batch	**Confirm**
Check stock availability	**Check Availability**
Complete an available batch	**Validate**
Print an in-progress or completed batch	**Print**
Print labels	**Print Labels**
Stop an in-progress batch	**Cancel**
Open allocation information	**Allocation**
Pack the current operation	**Put in Pack**

Result: The batch remains on screen with its new state or opens the selected allocation or
packing surface.

Process returns and destruction

A return order records goods coming back from a customer. A destruction certificate records the
items approved for destruction after a return requires scrapping.

Progress a return

Prerequisites

- You have the return details, customer, salesperson, return date, warehouse, return location, and
product lines.
- The return is in the state required by the next action.
- You have returns-manager access for **Process Return**.

Steps

1. Open the return order.
2. Complete the return header fields before entering its product lines.
3. In Products, enter **Product**, **Quantity**, Unit of Measure, Lot/Serial Number, Reason, and Notes.
4. Select the action that matches the current return state.

If the return is…	Select
A draft return	**Confirm**
Confirmed and received at the warehouse	**Receive in Warehouse**
Received and ready for authorized processing	**Process Return**
Processed	Done
A return you need to stop	**Cancel**
Cancelled and ready to rework	**Reset to Draft**

Result: The return order stays on screen at the next declared stage. When related records exist,
Destruction and **Credit Notes** provide their record destinations.

Approve a destruction certificate

Prerequisites

- You have returns-manager access.
- The certificate is in `draft`.
- You have the certificate date, customer, return order, warehouse, destruction method, and items
  to destroy.

Steps

1. Open the destruction certificate.
2. Complete the certificate header fields before reviewing its destruction lines.
3. In Items to Destroy, review **Product**, **Quantity**, Unit of Measure, Lot/Serial Number, Reason, Unit Value, Total Value, and Notes.
4. Select **Approve & Destroy**.
5. Read the confirmation message: “Are you sure? This will move all items to scrap and cannot be undone.”
6. **Confirm** the action only when the items and quantities are correct.
7. Choose the next certificate action.

If you need to…	Select
Print a certificate that is not cancelled	**Print Certificate**
Complete an approved certificate	**Done**
Stop before completion	**Cancel**

Result: The certificate advances from draft to approved when approved, and the certificate print
action remains available while the certificate is not cancelled.

Compute and validate landed costs

Landed costs add extra costs to stock valuation. Use the record to enter additional costs, compute
the valuation adjustments, and validate the result.

Prerequisites

- The landed-cost record is in `draft`.

- You know the date, journal, company, vendor bill, and stock receipts that receive the costs.
- You have the product, account, split method, and unit price for each additional cost.
- You have stock-manager access when you need **Valuation** after completion.

Steps

1. Open the landed-cost record.
2. Enter Date, **Journal**, **Company**, **Account Move**, and **Vendor Bill** as applicable.
3. Open **Additional Costs**.
4. Enter **Product**, **Name**, **Account**, **Split Method**, and **Unit Price** for each cost.
5. Review **Valuation Adjustments**, including **Cost Line**, **Product**, **Weight**, **Volume**, **Quantity**, **Former Cost**, **Final Cost**, and **Additional Landed Cost**.
6. Select **Compute** while the record is in draft.
7. Choose the next landed-cost action.

If you need to…	Select
Complete the landed-cost record	**Validate**
Stop the draft	**Cancel**
Open valuation after completion when valuation layers exist and your role has access	**Valuation**

Result: The landed-cost record is computed, validated, cancelled, or opened at its valuation
destination according to the selected action and record state.

Handle access and state-dependent branches

The same record can show different actions because access, state, transfer mode, counts, and
availability determine the available route.

If you see…	Use this rule
One-step transfer in draft	Use **Confirm**.
Two-step transfer in draft	Use تسليم — **Send**.
Two-step transfer in sent	Use استلام — **Receive**.
Return in received	A returns manager can use **Process Return**.

If you see…	Use this rule
Destruction certificate in draft	A returns manager can use **Approve & Destroy**.
Batch in progress with availability required	Use **Check Availability** before **Validate**.
Landed cost in done with valuation layers	A stock manager can use **Valuation**.
Dashboard with more than one allowed perspective	Use the role selector to choose the required perspective.
Dashboard with no allowed perspective	The dashboard displays No inventory views are enabled for your role. Contact an administrator.
Return with related destruction or credit-note records	Use **Destruction** or **Credit Notes**.

Result: You choose the action that matches the visible record state and your access instead of
using an action from another branch.

Troubleshoot an unavailable or unexpected surface

Use the visible state, access condition, and exact message to identify the next safe action.

What you see	What it means	What to do
Process Return is unavailable	The return is not in `received`, or the account lacks returns-manager access.	Open the return state and use the action for that state, or ask a returns manager to process it.
Approve & Destroy is unavailable	The certificate is not in `draft`, or the account lacks returns-manager access.	Check the certificate state and access before trying again.
Valuation is unavailable	The landed-cost record is not done, valuation layers are absent, or stock-manager access is missing.	Complete the landed-cost path and check the required access.
The confirmation message reads `Are you sure? This will move all items to scrap and cannot be undone.`	The approval action moves the certificate items to scrap and cannot be undone.	Check the items and quantities before confirming.

What you see	What it means	What to do
The requested inventory route lands on `/web` instead of the requested view	The expected inventory surface did not open.	Return to **Inventory** and choose the destination from the menu.
The menu does not open	The inventory menu surface is unavailable at that point.	Check the account's inventory access and open the destination again.

Know what happens next

Each completed action leaves the record at a next stage or opens a related operational record.

After you…	Continue with…
Send or receive an inter-company transfer	Review the transfer state, then use **Register Settlement** or **إرجاع — Return** after it is done.
Process a return	Open **Destruction** or **Credit Notes** when those related records are available.
Approve a destruction certificate	Select **Print Certificate**, then select **Done** after approval.
Validate landed costs	Open **Valuation** when valuation layers exist and your role permits it.
Need replenishment from the dashboard	Use Configure warehouses and replenishment.
Need movement or valuation reporting	Use Configure inventory reporting.

Result: The next record or operational page is clear before you leave the current inventory
surface.