

Standard Operating Procedure

Stock Issue

Objective

The goal of this Standard Operating Procedure (SOP) is to give staff a documented process flow to guide the stock issue process.

Related Policies

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| Supply and Logistics Policy | International Division Supply and Logistics Policy Guidelines (policy pending) |
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Related Documents

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| Delivery Planning and Monitoring Processes | SCM Process Maps - Delivery Planning and Monitoring v1.vsd |
| DPM-001-SOP | Delivery Planning.doc |
| DPM-002-SOP | Transport.doc |
| DPM-004-SOP | Delivery Reconciliation.doc |
| DPM-005-SOP | Paper-Based Stock Administration.doc |
| DPM-006-SOP | Recording Materials Usage.doc |

Purpose

The purpose of this document is to describe how to issue stock from warehouse inventory and how to create waybills to accompany deliveries.

This procedure should be used at operational level and is performed each time a delivery needs to be sent from the warehouse to retail sites, an internal warehouse or office, or to a third party e.g. a customer, supplier or other specialist.

Ownership

The head of Supply and Logistics is responsible for ensuring that this document is relevant, reflects actual practice and supports relevant organisational policies.

Circulation

All field staff in Logistics, Finance, Administration, HR and Programme/Project Technical.

Responsibility

All staff in the Warehouse and/or the Field Inventory Person and Supply and Logistics, are responsible for making sure deliveries are issued from stock and delivered to the receiving location on time, and that inventory and delivery records are accurate.

The Warehouse Person is responsible for arranging and executing all deliveries according to their due-on-site dates. This includes reviewing all upcoming deliveries and making sure that, where necessary, approval has been given.

The Warehouse Person is responsible for checking project inventory levels to ensure that sufficient stock is available and for providing delivery details to the requester, or if stock is not available, for informing Senior Supply and Logistics.

The Senior Supply and Logistics Person is responsible for reviewing delivery requirements and alternatives to supply if sufficient stock is not available to meet the delivery needs of the project site/s.

The Logistics Transport Person is responsible for arranging transport for the delivery/s as required.

The Warehouse Person is responsible for organising labour for picking and loading deliveries.

The Field Inventory Person is responsible for making arrangements to receive the delivery at the project site at the agreed delivery time.

The Warehouse Person is responsible for picking stock against the delivery request paperwork, issuing stock from project inventory, updating the stock administration, and creating a waybill for the delivery.

The Warehouse Person is responsible for informing Supply and Logistics if they have issued an asset from stock.

The Logistics Asset Person is responsible for updating the Asset Tracking records when assets are issued from stock.

Note that if a role identified as responsible for any activity in this document does not exist at the local level, the Country Director is responsible for assigning responsibility for the duties required by that role to an existing alternative role.

Accountability

The Warehouse Manager is accountable for ensuring that deliveries are issued on time to the correct receiving location in accordance with the procedures and business rules set out in this document. All supply and logistics and project activities must be compliant with all contractually agreed requirements and all applicable international and national laws, conventions and agreements in force in the country of operation. Any deviations from standard logistics procedures and their rationale must be documented and kept on record in the project office, the Regional Centre, and in Head Office.

Procedure Description

Warehouse Person

- Review current project delivery plans and stock requests. Assess the required due-on-site dates against project inventory levels to make sure enough stock is available to fulfill all upcoming deliveries. This includes checking for unprocessed materials returns and approved stock disposals,
- Where sufficient project inventory is available to meet delivery needs, agree an arrival time for the delivery with the requester (shown on the documentation) and advise them of any transport terms and conditions related to the delivery,
- Where sufficient project inventory is not available to fulfill delivery requirements for the project, inform the Senior Supply and Logistics Person.

Senior Supply and Logistics Person

- If a stock shortfall exists, assess options for rescheduling the delivery date, and if this is not possible, evaluate options for a possible stock transfer. Make sure replenishment needs and transport costs are thoroughly considered for the requesting project and obtain necessary approvals before making any arrangements. See SPM-004-SOP – Unscheduled Supply Replenishment, IMA-004-SOP – Stock

Transfer (Same Project) and IMA-005-SOP – Stock Transfer (Different Project or Contract) for more detail.

Logistics Transport Person

- Review all upcoming deliveries and arrange transport for them if required. See DPM-002-SOP – Transport for more detail.

Warehouse Person

- Organise staff and/or casual labour to assist with picking and loading deliveries onto vehicles.

Field Inventory Person

- Use the information provided by the Warehouse Person about planned delivery dates and times to make sure someone is available to receive any planned deliveries at project sites or other locations.

Warehouse Person

- Pick stock against the delivery request paperwork (delivery plan or stock request; stock return notice; approved stock disposal form, etc.) and put the goods into the staging area of the warehouse ready to be loaded onto the vehicle,
- Update relevant stock cards,
- Check the re-order point quantity on the stock card when writing the new balance. If the stock balance dips below the re-order point, advise the Senior Supply and Logistics Person so they can arrange replenishment,
- Issue stock from project inventory.

[See Quick Reference Guide for Stock Issue for more detail](#)

- Print a waybill to accompany the delivery.

[See Quick Reference Guide for Stock Issue \(Print Waybill\) for more detail](#)

- If assets are being issued from stock, inform the Logistics Asset Person by providing them with a copy of the delivery waybill with 'Is Asset' clearly labeled on the page.

Logistics Asset Person

- If assets have been issued from stock (and the assets are not in-transit), update the Asset Tracking records to reflect the stock issue:
 - If the asset is being taken from stock and assigned to a person or place within the same JR organisational unit, go to AST-002-SOP Assign Asset.doc,
 - If the asset is being donated, loaned or transferred to another JR organisational unit or partner or external organisation, go to AST-005-SOP Asset Movements-Disposal.doc, AST-004-SOP Asset Movements-Transfer.doc, or AST-003-SOP Asset Movements-Loan.doc as appropriate.

End of Procedure