



InterBranch Transfer Procedure

**** Please note: ALL TRANSFERS must be linked to a sales order!! ****

System being used: Units

Access Type: All Staff

Step 1. During a sales order the system may alert you that the branch is currently out of stock for an item you have entered. To check stock availability at other branches we need to complete the following steps.

Step 2. Put the mouse cursor in the part number that you are wanting to transfer. Then select 'OOSR' which means Out Of Stock Resolution. This is located in the mid menu bar.

Step 3. This will then open up a pop up window which will allow you to see each branch & their current stock levels.

**** Please Note: It is good practice to call the store direct to confirm that the stock level is correct ****

Step 4. Select the quantity you are wanting to transfer & enter it in transfer quantity from the branch you wish to transfer it from. Then hit select.

Step 5. Complete Sales Order as normal.

Step 6. Once you have Accepted the Sales Order, another pop screen will open which will allow you to complete the Interbranch Transfer Request.

Step 7. Enter in your unique pin code

Step 8. The rest of the transfer details will automatically generate as you have linked it to the Sales Order. You will need to put in the following details into the Reasons for Transfer Section:

- Sales Order No.
- Customer's Name
- Date Required By: _____
- Item Checked By: _____



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Step 9. Untick all print boxes & tick email box. At this stage you will need to enter in the email of the branch that you are requesting the stock from referring to the stores emails below, THIS IS NOT AN INDIVIDUAL PERSON! Once you have completed this, click Accept.

coopersplains@4x4megastore.com.au

goldcoast@4x4megastore.com.au

hendra@4x4megastore.com.au

underwood@4x4megastore.com.au

**** SAME DAY TRANSFERS - if you are requiring an item the same day urgently please ensure you are calling/ texting Darren on 0412 280 236 as well as emailing to ensure that it is collected promptly and not forgotten about ****

Step 10. Once the email confirmation screen pops up, you will then need to also CC in DARREN@4x4MEGASTORE.COM.AU this must be done on ALL transfers.