

HOW TO PROCESS EQUIPMENT TRANSFERS

The purpose of this document is to provide users with the basic understanding of transferring equipment items between branches.

If the equipment has associated stock items that accompany the equipment, these items can also be transferred:

- Equipment cannot be transferred if it is currently on a rental contract.
- A user can only transfer from the user's branch but a request can be made to another branch to transfer the equipment to your branch. *Please refer to the section on ['Requesting Equipment to be Transferred to User's Branch'](#) in this document for more information.*

If the user's branch is the head office branch, the user is able to transfer from this branch and receive into the receiving branch.

Software Version: 1801

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TRANSFERRING EQUIPMENT TO ANOTHER BRANCH

The purpose of this process is to transfer equipment and sales items, if applicable, i.e. stock items that accompany the equipment. The user can only transfer from the user's branch and any of the authorised warehouses under the branch.

1. From the Menu, select **Equipment Management > Equipment Transfer**
2. Click ADD NEW

Info: "Do you want to send Equipment to another branch?"

3. Click YES
4. Select the branch that the equipment is to be transferred to, from the **To Branch** drop down list

From Branch will default to the user's branch. If the user is authorised to access multiple branches, then a drop down list will be available. Otherwise, this field will be locked for editing.

5. Select the relevant warehouses from the **From Whouse** and **To Whouse** drop down lists for any associated sales items
6. Click SAVE in the toolbar

This will default a system generated **Transfer ID**.

The screen will now be ready for information to be entered in the *Details* panel.

7. As a minimum, select the **Equipment** and **Quantity** (if the **Item Type** is 'Equipment') or **Item** and **Quantity** (if the **Item Type** is 'Sales Item')

Note: Selecting an equipment code from the **Equipment** drop down list will default relevant values in the **Category, Type, Make** and **Model** fields.

Selecting an item code from the **Item** drop down list will default relevant values in the **Description, From Bin** and **To Bin** fields.

8. Click SAVE on the detail line
9. Enter additional equipment and/or sales items to the transfer, if required
10. Click SAVE in the toolbar

This will activate the TRANSFER and CANCEL buttons.

11. Click the TRANSFER button

This will display the Transfer Docket.

The Transfer Docket report can be exported to Excel / PDF, faxed or emailed. Clicking on the EMAIL button will display the *Email Report* screen. The file name will default to 'Fleet_Transfers_Multiple', and can be changed if required.

Receiving an Equipment Transfer

After an item has been transferred, the receiving branch must acknowledge receipt of the equipment item(s) and the applicable sales item(s) transferred to the branch.

1. From the Menu, select **Equipment Management > Equipment Transfer**
2. Enter the number of the transfer that is to be received, in the **Transfer ID** field

This transfer number is printed on the Transport Docket.

3. Click FILTER

This will display details of the transfer. The **Status** of the record will be 'TRANSFERRED'.

Only the RECEIVE, SELECT ALL and REJECT buttons will be active.

4. Select the detail lines to be received using the **Select** checkbox
5. Alternatively, click SELECT ALL if all the detail lines are to be received
6. Click RECEIVE

Info: "Equipment Transfer completed successfully for selected item(s)."

7. Click OK

The **Status** of the record will now be updated to 'RECEIVED'.

8. Click SAVE in the toolbar

This will default a system generated **Transfer ID**.

The screen will now be ready for information to be entered in the *Details* panel.

Requesting Equipment to be Transferred to the User's Branch

A request can be placed with another branch to transfer an equipment item to the user's branch.

1. From the Menu, select **Equipment Management > Equipment Transfer**
2. Click ADD NEW

Info: "Do you want to send Equipment to another branch?"

3. Click NO
4. Select the branch that the transfer is to be requested from, using the **From Branch** drop down list

To Branch will default to the user's branch. If the user is authorised to access multiple branches, then a drop down list will be available. Otherwise, this field will be locked for editing.

5. Select the relevant warehouses from the **From Whouse** and **To Whouse** drop down lists for any associated sales items
6. As a minimum, select the **Equipment** and **Quantity** (if the **Item Type** is 'Equipment') or **Item** and **Quantity** (if the **Item Type** is 'Sales Item')

Note: Selecting an equipment code from the **Equipment** drop down list will default relevant values in the **Category, Type, Make** and **Model** fields.

Selecting an item code from the **Item** drop down list will default relevant values in the **Description, From Bin** and **To Bin** fields.

7. Click SAVE on the detail line
8. Enter additional equipment and/or sales items to the transfer, if required
9. Click SAVE in the toolbar

This will activate the REQUEST and CANCEL buttons.

10. Click the REQUEST button

The **Status** of the record will be updated to 'REQUESTED'.

An email will automatically be sent to the nominated email address (if the branch parameter **Email for Transfers** is configured) requesting them to confirm the transfer.

Confirming a Request to Transfer Equipment

When a branch has been sent a request to transfer equipment, that branch then confirms (approves) the request.

Note: The request can also be rejected.

1. From the Menu, select **Equipment Management > Equipment Transfer**
2. Enter the number of the transfer that is to be received, in the **Transfer ID** field
3. Click FILTER

This will display details of the transfer. The **Status** of the record will be 'REQUESTED'.

Only the TRANSFER, REJECT and CANCEL buttons will be active.

4. Click TRANSFER

This will display the Transfer Docket.

The Transfer Docket report can be exported to Excel / PDF, faxed or emailed. Clicking on the EMAIL button will display the *Email Report* screen. The file name will default to 'Fleet_Transfers_Multiple', and can be changed if required.

Rejecting an Equipment Transfer

A request can be declined and an equipment item in 'TRANSFERRED' status can be rejected by the receiving branch.

To complete this procedure, the **Status** of the transfer record must be 'TRANSFERRED' or 'REQUESTED'.

1. From the Menu, select **Equipment Management > Equipment Transfer**
2. Enter the number of the relevant transfer record or request in the **Transfer ID** field
3. Click FILTER

This will display details of the transfer.

If the **Status** of the record is 'REQUESTED', only the TRANSFER, REJECT and CANCEL buttons will be active.

If the **Status** of the record is 'TRANSFERRED', only the REJECT, RECEIVE and CANCEL buttons will be active.

4. Click REJECT

Info: "You are about to cancel this Branch Transfer. Continue?"

5. Click YES

The **Status** of the record will be updated to 'REJECTED'.

Cancelling an Equipment Transfer

A transfer request or an 'OPEN' transfer record can be cancelled.

To complete this procedure, the **Status** of the record must be 'OPEN' or 'REQUESTED'.

1. From the Menu, select **Equipment Management > Equipment Transfer**
2. Enter the number of the relevant transfer record in the **Transfer ID** field
3. Click FILTER

This will display details of the transfer.

If the **Status** of the transfer record is 'REQUESTED', only the TRANSFER, REJECT and CANCEL buttons will be active.

If the **Status** of the transfer record is 'OPEN', only the TRANSFER and CANCEL buttons will be active.

4. Click CANCEL

The **Status** of the transfer record will be updated to 'CANCELLED'.

Note: When cancelling an 'OPEN' or 'REQUESTED' transfer, there is no warning message. The **Status** immediately changes to 'CANCELLED'.

Simple Transfers

If the parameter **Simple Transfer Processing** is enabled, the standard equipment transfer processes change; transfer and receive processes are completed in the same transaction.

The same steps as described in the section '[Transferring Equipment to another Branch](#)' of this document, are to be followed. However, clicking the TRANSFER button will display the Transfer Docket and update the **Status** of the record to 'RECEIVED'.

Note: Enabling the parameter **Simple Transfer Processing** helps the transferred equipment item(s) to be immediately available in the receiving branch.

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