



# Online Pending Transfers Guide

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# Overview of Online Pending Transfers

Online pending transfers is a simple, intuitive way for stores to request transfers from another location while corporate is notified and approves/denies the transfer.

The originating store creates a transfer request and sends it to corporate. Corporate then can adjust the request and send it to the intended store. The store then can verify transfer quantities, sending this back to corporate. Corporate can once again adjust as needed, finally sending it back to the originating store. The originating store can then apply the transfer.

**Inventory**

Transfers | Pending Transfers | Suggested Transfers | Adjustments | Receiving | Reorder | Inventory | Lottery Reconciliation | Utilities

Filter  
Store: All Stores | Status: Unapplied | Refresh

Online Pending Transfers

From	To	Requested Date	Status	Approved	Verified	Applied	Notes
2	3	7/20/2018 5:00 PM	Requested	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2	2	9/7/2018 4:01 PM	Requested	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Replenish receiving stores inventory

Create New Transfer | View Transfer | Print Transfer | Delete Transfer

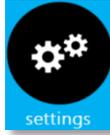


# Enabling Online Pending Transfers

1. From within the POS, choose "actions"



2. Next, choose "settings"



3. Next, choose "SETTINGS"



4. Next, choose "Other Settings"



5. Finally, make sure "Enable Online Pending Transfers" is check boxed and choose save

pos | SETTINGS

Receipt Settings	Scanner Settings	Display Settings	Register Settings	<b>Other Settings</b>	Custom Actions
Credit Cards	Loyalty Settings	Recon Settings	Integrations	Remote Settings	

**General Settings**

- Reg Z Show Departments
- Reg Z Is Blind
- Reg Z Show Department Groups
- Reg Z Force Close Suspend Sale
- Print Chit On Clock In/Out
- Disable Timeclock
- Use Biometric Reader
- Verify Checks: **None**
- House Acct Vendor:
- Print House Acct Invoices: **None**
- # of House Acct Receipts:
- Tare Weights:
- Days to Keep Live Rcpts:  Days to Keep Archive:
- Break "Up" Inventory
- Enable Online Pending Transfers**

**Force A Starting Till**

- Force A Starting Till
- Unique Cashier Per Z
- Use Recon Buckets In Reg Z
- Detailed Logging
- Force Timeclock Before Using POS
- Force Auth On All Timeclock Entries

**Corporate Settings**

- Enable Corporate Integration [Update Exporter INI](#)
- Corporate IP:
- Store IP:

**Coupon Tenders** [Manage Tender Mapping](#)

- Scanned Store Coupon Tender ID:
- Scanned Manuf Coupon Tender ID:

**Gift Card Settings**

- Gift Card Server:
- Gift Card Uses SSL
- Allow Manual Gift Card Entry
- Print GC On Receipt Printer

**News / Announcements Interval**

- Check News Every  Minutes
- Check Annc Every  Minutes

**Cancel Save**



## Creating a Transfer Request

1. From within the POS, choose "actions"



2. Next, choose "inventory"



3. Next, choose "PENDING TRANSFERS"

PENDING TRANSFERS

The below screen will now show up

online pending transfers | SUMMARY

From	To	Status	Notes
------	----	--------	-------

0 XFer Found

show Unapplied 1 close 2 view 3 new 4

1. show dropdown – A filter that filters between the following: unapplied, unsent, requested, approved, verified, in transit, and applied
2. close – Closes the window
3. view – Views the selected row in detail
4. new – Creates a new transfer request



4. Choose "new"

new

5. Enter the from store, to store, any notes needed, and choose "create"

pending transfers | NEW

transfer from store 2 - Store 2

transfer to store 1 - Default Store

notes

notes go here

cancel create

The below screen will now show up

online pending transfer | DETAILS

from: 2 - Store 2 requested: DEFAULT CASHIER on 10/29/2018

to: 1 - Default Store approved:

status: Unsent verified:

applied:

notes: notes go here

PLU	Description	Xfer Qty	Verify Qty	Apply Qty	Verified	Received
0 Items						

1 close 2 request 3 print 4 add item 5 remove item

1. close – Closes the window
2. request – Sends the request to corporate
3. print – Prints a report version of the request
4. add item – Brings up the add item window
5. remove item – removes the selected item



6. Choose add, search for the item, enter the "qty to xfer", and "add item"

pending transfer | ITEM DETAILS

plu / upc # 012300000123

description WINSTON 85 BX RED (FF) FSC

qty on hand 116

qty to xfer

cancel add item

7. Repeat until done requesting items, and choose "request"

request

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## Reviewing and Approving the Transfer at Corporate

1. At corporate and within Director, choose the "Inventory" module



2. Choose the "Pending Transfers" tab

Pending Transfers

3. Double click the transfer needed to be reviewed or click once and then the "View Transfer" button

View Transfer

The below screen will then show up

**Pending Transfer Worksheet**

From Store: **2 - Store 2** Requested: **DEFAULT CASHIER on 10/29/2018**  
To Store: **1 - Default Store** Approved:  
Status: **Requested** Verified:  
Notes:  Applied At To Store:  
Applied At From Store:

Items On Transfer

PLU	Description	Xfer Qty	Verify Qty	Rcv Qty	Verified	Received
012300000123	WINSTON 85 BX RED (FF) FSC	3	0	0	<input type="checkbox"/>	<input type="checkbox"/>

**1 Item** 1 Close 2 Approve 3 Print 4 Add Item 5 Remove Item

1. Close – Closes the window
2. Approve – Approves the transfer for the reviewing store to review
3. Print – Prints the worksheet
4. Add Item – Brings up a window to add an item
5. Remove Item – Removes the selected item from the worksheet



4. After making any changes needed, choose "Approve"

Approve

The transfer is now able to be edited and verified at the store the requesting store intended.

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## Verifying the Transfer at the Second Store

1. From within the POS, choose "actions"



2. Next, choose "inventory"



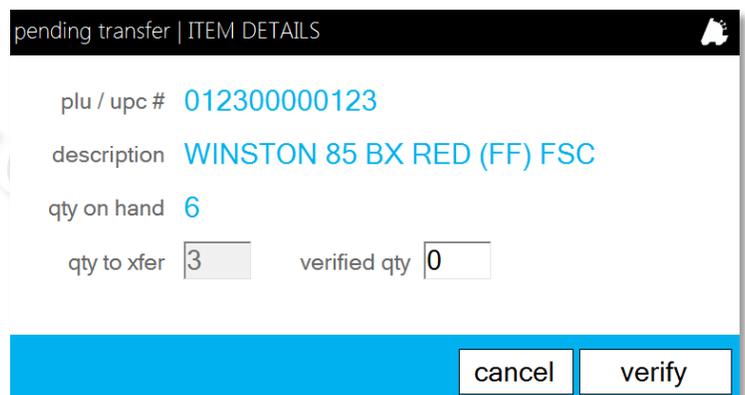
3. Next, choose "PENDING TRANSFERS"



4. Choose the transfer by double clicking it or by selecting it and choosing "view"



5. Double click or click an item and then choose "verify" to verify the quantity on an item, enter the "verified qty", and choose "verify"



6. When done verifying each item on the transfer, choose the "verify" button and "yes" to flag the transfer as verified for corporate





## Reviewing and Approving the Verified Transfer at Corporate

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1. At corporate and within Director, choose the "Inventory" module



2. Choose the "Pending Transfers" tab



3. Double click the transfer needed to be reviewed or click once and then the "View Transfer" button



4. After viewing the transfer and confirming details, choose the "In Transit" button followed by "Yes" to confirm the transfer to be received at the originating store



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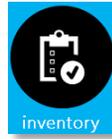


## Receiving the Transfer at the Originating Store

1. From within the POS, choose "actions"



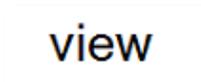
2. Next, choose "inventory"



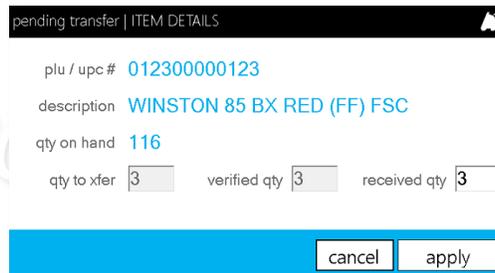
3. Next, choose "PENDING TRANSFERS"



4. Choose the transfer by double clicking it or by selecting it and choosing "view"



5. On each item, double click to view and enter the reviewed quantities, followed by clicking "apply"



6. When done reviewing, choose "apply" to apply it to inventory. Choose "yes" at the confirmation screen.



For assistance with configurations, please contact Technical Support at [Support@FasTraxPOS.com](mailto:Support@FasTraxPOS.com)