SBT (Scan Based Trading) Transfers Out
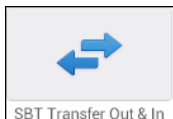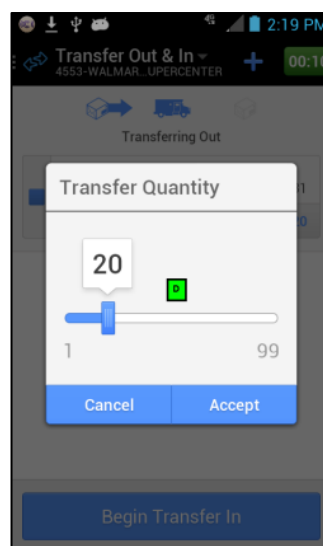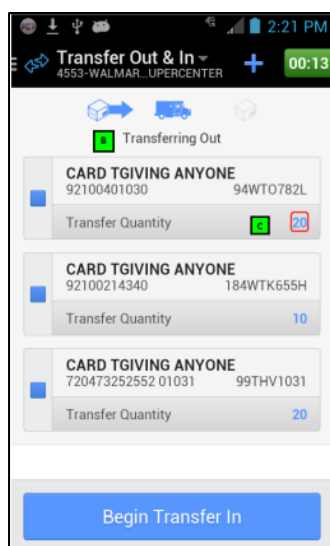

SBT Transfer Out & In

The SBT Transfer function allows product to be transferred between SBT accounts and captures the correct inventory adjustments of product in/out for each account. This is primarily a TA function unless directed otherwise.


A. Scan into account you are **transferring the product from** and select **SBT Transfer Out & In.**

B. **Scan** the **product** you are **transferring**. The **products** scanned and the **# of pieces** of each to transfer appear in a **list** with the last item scanned at the top.

C. To **edit** an entry, tap on the **transfer quantity number** in the darker gray area.

D. A slider will appear to allow you to enter the quantity of that product that you wish to transfer. There is a **limit of 99 pieces** per product. Tap on **Accept** or **Cancel** if not correct.
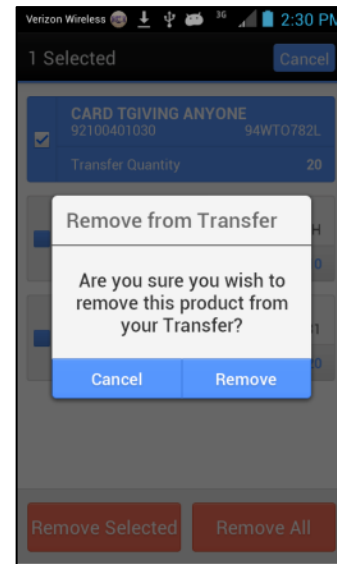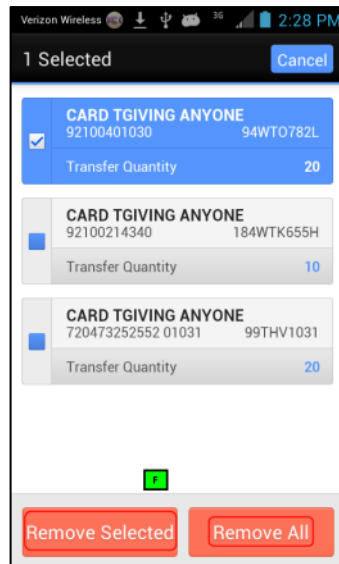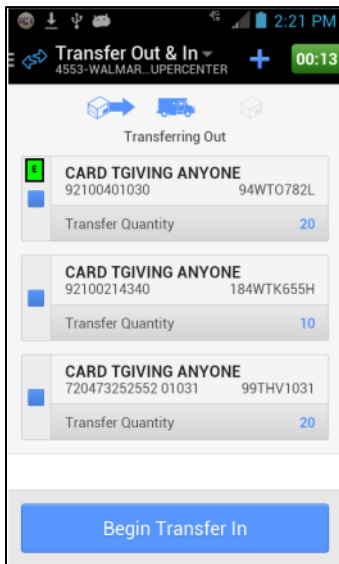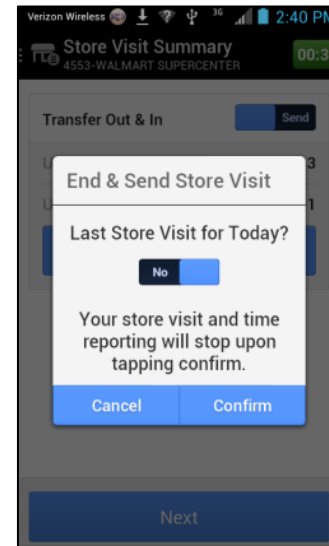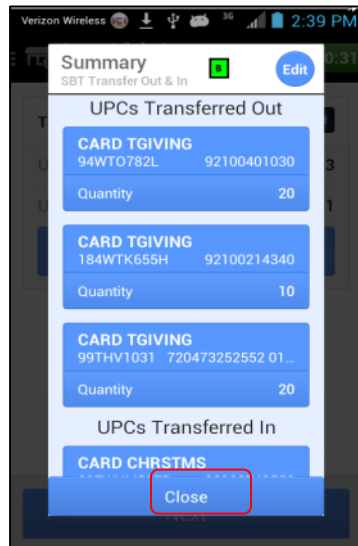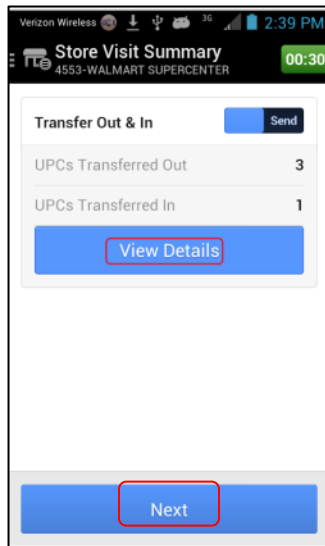

E. To **delete an entry,** tap on the **blue square** 🔲 in front of the entry.

F. Select **Remove Selected** to remove that entry or **Remove All** to remove all entries.

G. Select **Remove** to continue the action or **Cancel.**
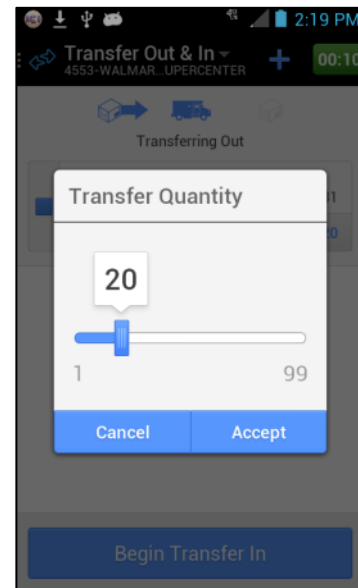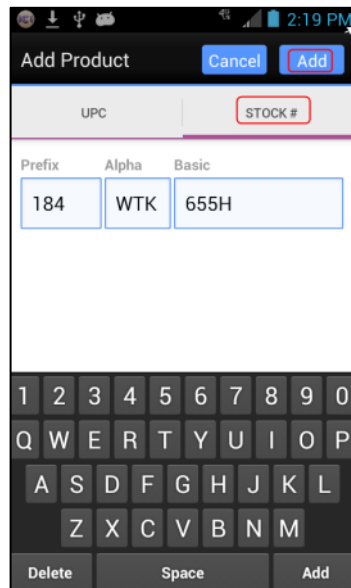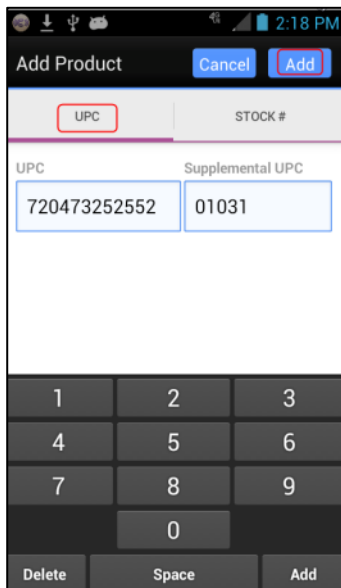
H. To **manually add product,** tap the **+ sign** at the top of the screen.

I. Select **UPC** or **Stock #** and tap **Add.** Use the **slider** to enter piece quantity.

J. Tap **Accept** to add the item or **Cancel.**

A. **End the store visit**. You will see a **Transfer Out & In summary** screen.

B. Tap on **View Details** to view detailed list of transfer product.

C. Tap on **Close** and **Next** to end store visit.

D. To continue collecting product to transfer, **scan** into the next account and select **Transfer Out & In**. You would **continue to scan additional product** that would be collected and **added to your original list** regardless of that store they were transferred out of. Duplicate items that may have already been scanned at a previous account would be added to that product's totals. Only the current store products are able to be removed or edited in the list. Once scanned out of a store, you are no longer able to edit the products from that store.
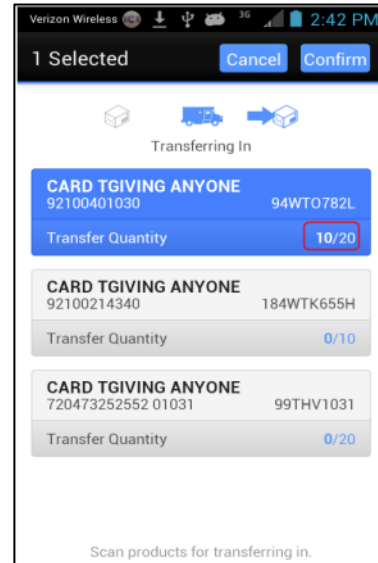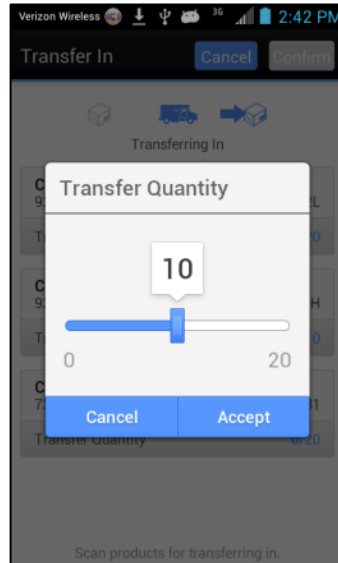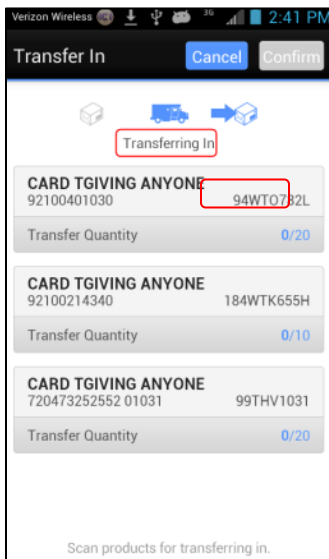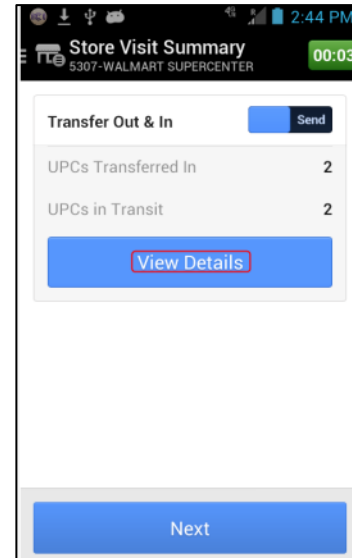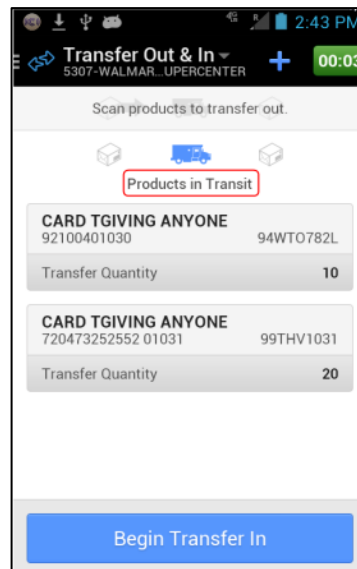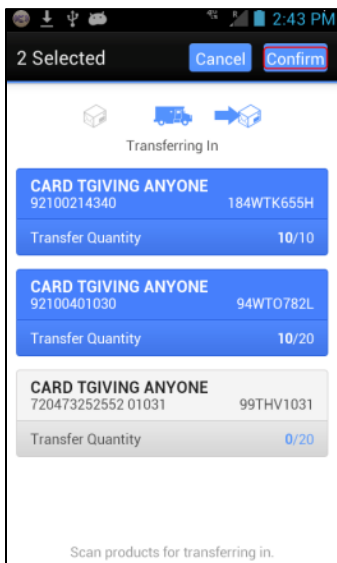
SBT Transfer In
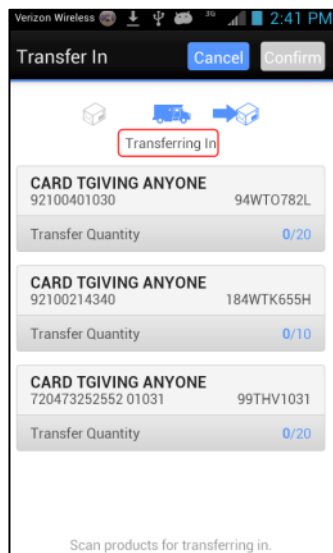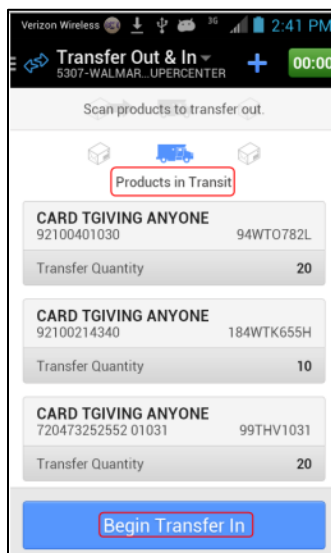
A. **Scan into** the account you want to **transfer the items to** and select **Transfer Out & In**.

B. Products scanned out are **Products in Transit**.

C. Tap on **Begin Transfer In**. The list of transferred out products would appear.

D. **Scan the items** to transfer in or tap on the **item quantity number** in the darker gray area to select item for transfer in.

E. Use the **slider** to select the number of pieces of that item to transfer. Tap **Accept** to continue the action or **Cancel.**

F. Continue down the list of products that you want to transfer in. When **finished**, tap **Confirm.**

G. Any **remaining product not transferred i**n will remain in your **Product in Transit list** with the number of pieces left of that product and can be transferred to additional stores.

H. When you go to **End Visit**, a **Transfer Out & In summary screen** will appear. You can select **View Details** to see product details.
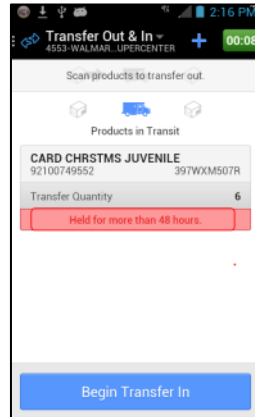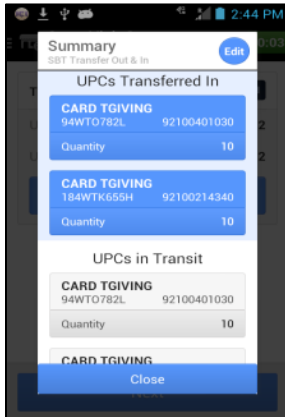
I. A **detailed list of UPCs transferred in** and **remaining UPCs in Transit** if not all product was transferred in. You can still choose **Edit** to make any changes before leaving the account.

J. Product should be delivered as soon as possible. If **Products in Transit** are not transferred into an account **within 48 hours**, a warning prompt will appear.