

Major Unit Inventory Transfer Out Process

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Created by	Creation Date	Last Updated
Justin Quinn	Apr 22, 2024	Apr 22, 2024

STEP 1

Click on Major Unit Management

DX1 Justins Powersports

Leads

Sales Assistant

Finance Applications1

Calls

Major Units

Sales

Major Unit Management

Packaging

Model Management

Reports

Inventory Quantity by Body Type

ATV Off Road	3
Motocross Off Road	5
Motorcycle Off Road	3
PWCs	1

Parts and Acc

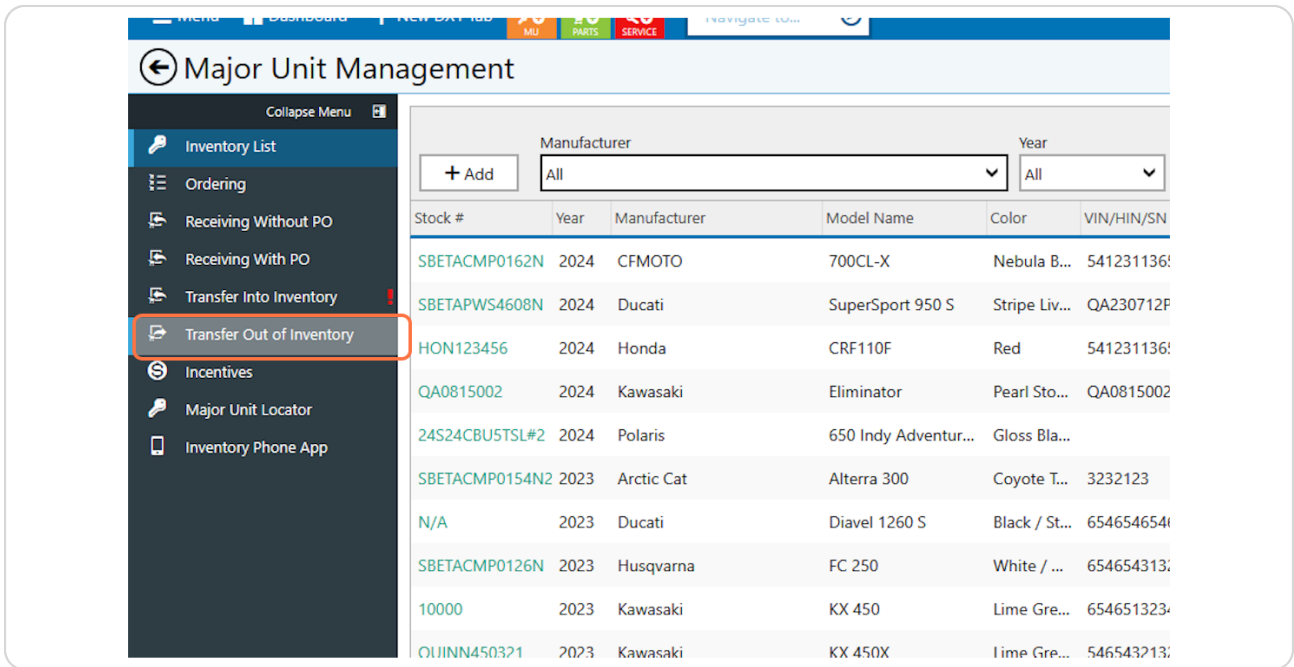
Sales

Vendor Return

DX1 Fiche for DMS

STEP 2

Click on Transfer Out of Inventory

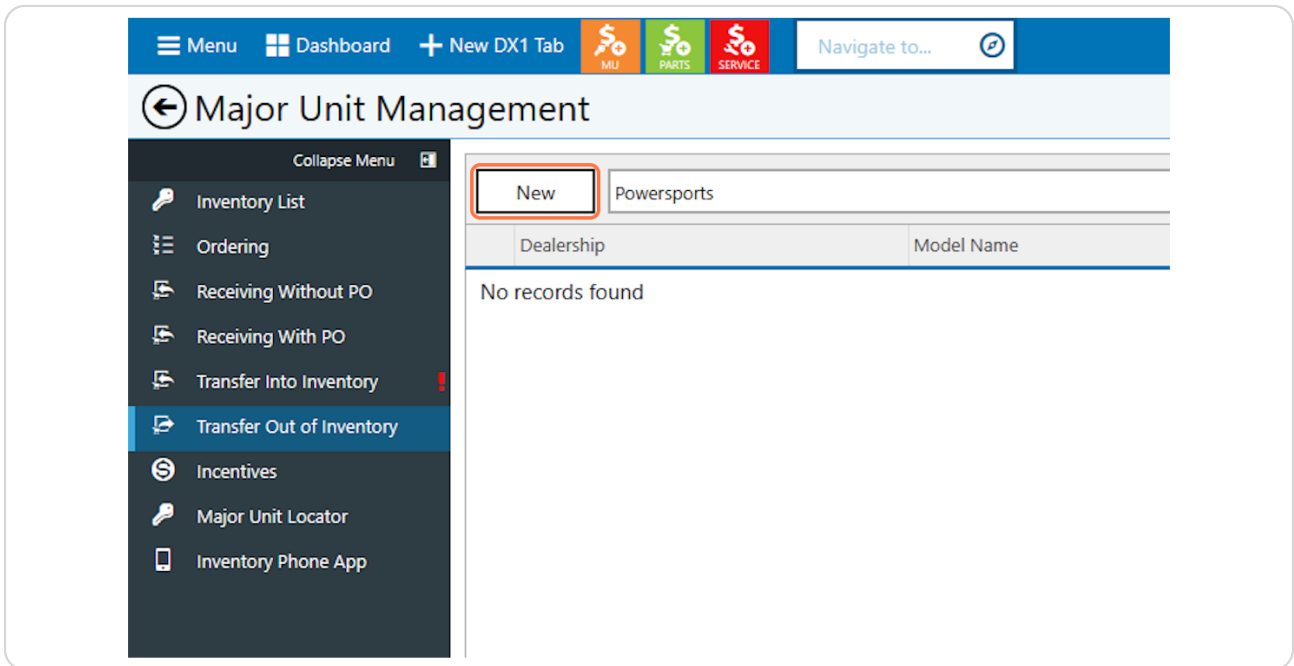


The screenshot shows the 'Major Unit Management' interface. On the left, a sidebar menu lists various options: Inventory List, Ordering, Receiving Without PO, Receiving With PO, Transfer Into Inventory, **Transfer Out of Inventory** (highlighted with a red box), Incentives, Major Unit Locator, and Inventory Phone App. The main area displays a table of units with columns: Stock #, Year, Manufacturer, Model Name, Color, and VIN/HIN/SN. The table contains several rows of data, including units from CFMOTO, Ducati, Honda, Kawasaki, Polaris, Arctic Cat, and Husqvarna.

Stock #	Year	Manufacturer	Model Name	Color	VIN/HIN/SN
SBETACMP0162N	2024	CFMOTO	700CL-X	Nebula B...	541231136
SBETAPWS4608N	2024	Ducati	SuperSport 950 S	Stripe Liv...	QA230712P
HON123456	2024	Honda	CRF110F	Red	541231136
QA0815002	2024	Kawasaki	Eliminator	Pearl Sto...	QA0815002
24S24CBU5TSL#2	2024	Polaris	650 Indy Adventur...	Gloss Bla...	
SBETACMP0154N2	2023	Arctic Cat	Alterra 300	Coyote T...	3232123
N/A	2023	Ducati	Diavel 1260 S	Black / St...	654654654
SBETACMP0126N	2023	Husqvarna	FC 250	White / ...	654654313
10000	2023	Kawasaki	KX 450	Lime Gre...	654651323
QUINN450321	2023	Kawasaki	KX 450X	Lime Gre...	546543213

STEP 3

Click on New



The screenshot shows the 'Major Unit Management' interface. On the left, a sidebar menu lists various options: Inventory List, Ordering, Receiving Without PO, Receiving With PO, Transfer Into Inventory, **Transfer Out of Inventory** (highlighted with a red box), Incentives, Major Unit Locator, and Inventory Phone App. The main area displays a form for adding a new unit. The 'New' button is highlighted with a red box. The form includes fields for 'Dealership' and 'Model Name'. Below the form, it states 'No records found'.

STEP 4

Click on Search

New DX1 Tab MU PARTS SERVICE Navigate to...

Transfer Out Detail

Name or Company Name

Transfer Initiation Date

Year Model/Model Code

STEP 5

Search for the transferring dealers name

Transfer Initiation Date

Transfer Acceptance No.

Year

Search Customer

+ Add Name Phone Zip Code VIN

Powersports (xxx) xxx-xxxx or xxx-xxxx

Name	Phone	Address
#1 09012017, #1 09012017	(555) 555-5555	123, Lock
#1, 08072017, #1, 08072017 errr	(555) 555-5555	#1, Addr
#1, 08152017, #1, 08152017 #1, 08152017	(555) 555-5555	test, Was
#1, 08282017 LastName, #1, 08282017 First	(555) 555-5555	#1, Addr
#14, 08072017, #14, 08072017	(555) 555-5556	#16, Blar
#2, 08072017, #2, 08072017	(555) 555-5555	#1, Addr
#2, 08162017, #2, 08162017	(555) 555-5555	46 Secon

STEP 6

Click on Search

Transfer Charge Amount

\$

Color

+ Add Selected X Cancel

Zip Code VIN/HIN/SN

Search X

Address

- 123, Lockhart, AL (Covington)
- #1, Address / @#!@#, Smyrna, TN (Rutherford)
- test, Washington, DC (District Of Columbia)
- #1, Address / @#!@# #2, Address / @#!@#, Washington, DC
- #16, Blank Required Field, NOT DEFINED, -- (NOT DEFINED)
- #1, Address / @#!@# New York, NY (New York)

STEP 7

Click on the desired dealer from the list

Search Customer

+ Add Selected X Cancel

+ Add Name Phone Zip Code VIN/HIN/SN

Powersports (xxx) xxx-xxxx or xxx-xxxx Search X

Name	Phone	Address
Dx1 Powersports Canada		Newton Falls, OH (Trumbull)
Jewel, Nicholas	(555) 555-5555	Fleming Island, FL (Clay)
Powersports to powersports, Qa160516	(555) 555-5555	New York, NY (New York)
Powersports01, AR		Norwood Young America, MN (Carver)
Segway Powersports (C(C-MFR)		NOT DEFINED, -- (NOT DEFINED)
Segway Powersports (C(C-WC)		NOT DEFINED, -- (NOT DEFINED)

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STEP 8

Click on Add Selected

The screenshot shows a software interface with a modal window. The modal window has a header with a blue button labeled '+ Add Selected' and a grey button labeled 'X Cancel'. Below the header is a search bar with a 'Search' button and a close button. The search bar contains the text 'Zip Code' and 'VIN/HIN/SN'. Below the search bar is a list of addresses. The first address is 'Newton Falls, OH (Trumbull)' and is highlighted in blue. Below it are two other addresses: 'Fleming Island, FL (Clay)' and 'New York, NY (New York)'. The background of the interface shows various fields for 'Transfer Acceptance No.', 'Transfer Acceptance Date', 'Transfer Charge Amount', and 'Color'.

STEP 9

Type in the transfer request number

The screenshot shows a software interface with a header bar containing a 'Menu' button, a 'Dashboard' button, a '+ New DX1 Tab' button, and a 'Navigate to...' button. The header bar also contains a red notification bar that says 'Invalid 1 field'. Below the header bar is a section titled 'Major Unit Transfer Out Detail'. This section contains a 'Dealership' dropdown menu with 'Dx1 Powersports Canada' selected. Below the dealership is a 'Transfer Request No.' field with the value '132' entered. To the right of the 'Transfer Request No.' field is a 'Transfer Initiation Date' field. Below the 'Transfer Request No.' field is a 'Transfer Note' text area. At the bottom of the form are three dropdown menus: 'Manufacturer' (set to 'All'), 'Year' (set to 'All'), and 'Model/Model Code'. To the right of these dropdowns is a 'VIN/P' field.

Click on the transfer out date

Type the transfer acceptance number

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STEP 12

Click on the acceptance date

Transfer Acceptance Date

←

Apr

▼

2024

▼

→

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

Search

X

STEP 13

Type a transfer note

Menu

Dashboard

+ New DX1 Tab

MU

PMTS

SERVICE

Navigate to...

DX1 Justins P

←

Major Unit Transfer Out Detail

Dealership

Dx1 Powersports Canada

Transfer Request No.

132

Transfer Initiation Date

04/22/2024

Transfer

98

Transfer Note

Dealer Transfer

Manufacturer

All

Year

All

Model/Model Code

STEP 14

Select a model using either manufacturer, year, model code or any combination

DX1 Justice Powersports

Major Unit Transfer Out Detail

Transfer Request No. 112

Transfer Initiation Date 04/22/2024

Transfer Acceptance No. 617054

Transfer Acceptance Date 04/22/2024

Transfer Note Dealer Transfer

Transfer Charge Amount \$

Manufacturer All Year 2024 Model/Model Code VIN/11N/12N/13N/14N Color

Search

STEP 15

Click on Search

Transfer Acceptance Date 04/22/2024

Transfer Charge Amount \$ 0.00

Color

Search

STEP 16

Click on the desired unit

Manufacturer	Year	Model/Model Code	VIN/HIN/SN/Stock #	Color
All	2024			

Stock #	Year	Model Name	Model Code	Manufacturer	Model Type	Condition	Received	VIN/HIN/S
SBETACMP01	2024	700CL-X	CF700-2US	CFMOTO	Sport	NEW	Yes	5412311:
SBETAPWS46	2024	SuperSpor...	NA	Ducati	Supersport	NEW	Yes	QA23071
HON123456	2024	CRF110F	CRF110FLR	Honda	Motorcycl...	NEW	Yes	5412311:
QA0815002	2024	Eliminator	EL450CRF...	Kawasaki	Cruiser	NEW	Yes	QA08150

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STEP 17

Click on Complete

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Complete

Save

Cancel

Void

Transfer Acceptance Date

04/22/2024

Transfer Charge Amount

\$

Color

Search

Tango

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