Transfer Pool Quantities between Clients

When to use: When you need to move pool quantities from one client or to another.

Log into MAX
1) Navigate to https://www.tracommax.com/
2) Enter your **USERNAME** and **PASSWORD.**
3) Click **LOGIN**.

Navigate to the Client Snapshot Screen
1) Under the **CLIENTS** tab, click **Manage Client.**
2) Click the name of the client level *from which* you wish to transfer quantities.

View Product Pools
1) In the **PRODUCT POOLS** section of the **Client Snapshot** screen, click **Add/Edit**.

Transfer Pool Quantities
1) On the **Manage Pools** screen, find the product pool from which you wish to transfer quantity.
2) Click **Transfer** next to any active pool to view the **Transfer Pool Quantities** screen.
3) Use the **To Client** dropdown menu in the **PRODUCT** section to select the client to which you wish to transfer quantities.
4) Enter a reason for the transfer, or other descriptive statement, in the **Description** field (not required).
5) Enter transfer quantity for any available pools in the **POOLS WITH AVAILABLE QUANTITY FOR TRANSFER** section.
6) Click **Transfer Now** to transfer the quantity or **Cancel** to go back to the **Manage Pools** screen.

For further questions, please email support@tracom.com.