Transfer Items to Technician

1. Click on **New Sale** from the sales menu
2. **Add the tech to the sale** by searching for the technician in the customer search.
    a. **Example:** “Tech ###” with ### being their 3-digit tech number.
3. **Add the item(s) to the sale** you are transferring to the technician.
4. **Click on the Green Payment Button.**
5. **Click the Max Button by the Tech Transfer** payment option.
6. **Click Finish Sale to print the receipt.**
7. **Have the technician sign the receipt and put it in your drawer.**

Taking a Return for Items on Tech Transfer

1. **Scan Sales Receipt or Look Up Technician in customers and find the sale with the transfer item(s) on it.**
    a. If you looked up the technician’s customer record,
        i. Click on the Sale link in the left-hand menu, find the transaction in question, then click on the transaction ID.
        ii. Now click on the Refund button near the top of the page.
2. Once on the Refund Screen, **click on the refund button for the line item you taking back into inventory**.
    a. By default Lightspeed will try to take all the items back. Replace the number in the refund screen with how many items you are actually taking back.
        i. For example, if the tech took 4 of a part, Lightspeed will default to take all 4 back and show a “-4” in the return line at the top of the items list after the return button is clicked.
        ii. If you were only taking 2 back into inventory, replace the “-4” with “-2”.
3. Once all the items that need to be returned are listed, **click the Green Payment Button.**
4. **Click the Max Button by the Tech Return** payment option.
5. **Click the Finish Sale button to finalize the return.**