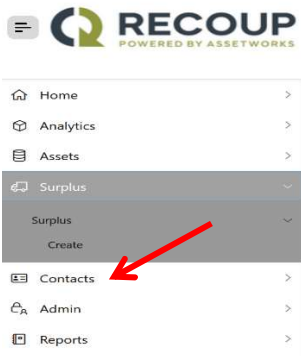


## Step 1: Creating a Transfer Shell

Although you will be on the home tab when you sign in you will do 99.9% of your work from the **Surplus** area. Best practice is to click the truck icon in left margin and to head there as soon as you log in!



You will land on a page where you can search for existing transfers, you'll also notice it opens a sub menu with a link to create a transfer.



Clicking **create** opens the form to create a new surplus transfer.

Complete the form and click the **create** button in the lower left, write down your transfer number!

The image shows the 'Create Surplus Transfer' form. The form fields are: From Department \* (10533 - TRANSPORTATION SERVICES), Notes, -- Contact Information --, Debit Speed Type \* (10533 - 12820411 - 537699 - DEBIT), Building \* (571 - TRANSPORTATION CENTER AND ANNEX), Room \* (191A), Contact Name \* (SHAWNA STUSHNOFF), Contact Phone \* ((303) 492-6324), Contact Email \* (shawna.stushnoff@colorado.edu), Campus Box \* (39), and Location Notes. A red border surrounds the entire form.

*\* Denotes a required field*

- **From Department\***: Auto populates to your department unless you are set up to process transfers for more than one ORG/Department
- **Notes**: Free form - for your use, Surplus Property does not automatically see this field
- **Debit Speed Type\***: Select a speed type to charge cost of fridge pick up or specialized pick up costs to. *Note: We don't normally charge for surplus property pickups however, fridges we do recoup cost to dispose of a fridge based on freon reclamation charges.*
  - *Cost for rental of specialized equipment may result in an extra cost however the surplus property supervisor will contact you regarding any additional cost outside of a fridge pick-up.*
  - *We do auto bill fridge costs via a JE when the fridge is dropped off.*
- **Building\***: Select your building from list associated with department, contact us to add/update buildings.
- **Room\***: Freeform – enter room/office where the contact person is located
- **Contact Name\***: Auto populates based on login, update as needed. This should be the best person to contact with questions regarding the assets on the transfer.
- **Contact Phone\***: Auto populates based on login, update as needed
- **Contact Email\***: Auto populates based on login, update as needed
- **Campus Box\***: Freeform - where the asset labels will be mailed. (e.g. 39 UCB)
- **Location Notes**: Freeform - any additional notes regarding **your** location