

How to Transfer Stock between Customer

Pre-requisites:

- [Issued a Stock](#)

Steps:

1. In the menu list, navigate to Patronage > Stock Details.
2. On the search screen, select a stock. Take note that the stocks qualified for transfers are:
 - a. Posted Stock
 - b. Activity Status = Open
3. After selecting a stock, click Transfer to Customer from the search screen toolbar. Transfer Instrument screen will show.
4. Enter details:
 - a. Transfer Date – defaulted to date today.
 - b. Description
 - c. Grid Details
 - i. Transferee – the patron customer to transfer the stock. required field.
 - ii. Other grid details are automatically filled from the selected stock (Transferor, Certificate No., Issue Date, Stock Name, Status, Par Value, Qty Available).

Transfer Instruments

Save Delete Undo Close

Details

Transfer Type: Transfer Stock between Customers Transfer Date: 8/2/2017 Transfer No:

Description:

X Remove Filter View Filter (F3)

<input type="checkbox"/> Transferor	Certificate No.	Issue Date	Stock Name	Status	Par Value	Qty Available	Transferee*
<input checked="" type="checkbox"/> Joe Ag	212321231	5/3/2017	A Shares	Voting	3,000.00	10.00	
<input type="checkbox"/>					0.00	0.00	

? ? ? ? Ready

5. Click Save.