How to Transfer Volume between Customers

Pre-requisite:

- Create Volumes: Adjustment Volume or Collect Volume

Steps:

1. From the menu screen, go to Patronage > Volume Details. Volume screen will show.
2. Select a volume record to transfer from the Volume Details grid.
3. Click Transfer from the toolbar. Transfer Instrument screen will show
4. Enter details to required fields:
    a. Transfer Type – Transfer Volume between Customers
    b. Transfer Date – defaulted to date today
    c. Transfer No – created on Save
    d. Description
    e. Grid Details:
        i. Transferor – source customer of the volume to be transferred
        ii. Fiscal Year – fiscal year of the source volume
        iii. Category – patronage category of the source volume
        iv. Qty Available – Volume quantity available for transfer
        v. Transferee – target customer of the volume to be transferred
        vi. Transfer % – quantity to transfer in percentage
        vii. Qty Transferred – Qty Available x Transfer %
5. Click Save. Check Volume Details screen to check volume changes.

Important Note:

- Deleting the Transfer Instrument record will reverse the changes between customer volumes.