

Transfer Pool Quantities between Clients or Sub-Clients

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

Navigate to the Client Snapshot Screen

- 1) Under the **CLIENTS** tab, click "**Manage Client**"
- 2) Click the name of the client 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 quantities
- 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.
- 5) Enter transfer quantities for any available pools in the **POOLS WITH AVAILABLE QUANTITY FOR TRANSFER** section
- 6) Click "Transfer Now" to transfer the quantities entered