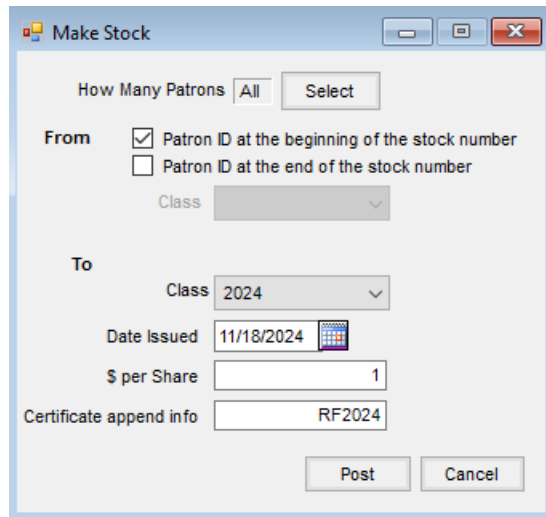# Batch Make Stock Certificates

Last Modified on 11/18/2024 3:13 pm CST

Stock Certificates may be batch created at *Utilities / Batch Make Stock Certificates*. This function makes Stock Certificates for the specified Stock Class for each Patron selected. The new certificates are marked as an *Active Stock Certificate*. The *Stock Certificate #, $ Value Per Share*, and *Class* on the new certificates are generated from input established on the *Make Stock* window.

- **How Many Patrons** – Optionally select the Patrons to be included in the mass production of Stock Certificates. One or more Patrons may be selected for the batch. Stock Certificates are only created for active Patrons.

- **Patron ID at the beginning of the stock number** – Selecting this option adds the Patron ID to the beginning of the created stock number.

- **Patron ID at the end of the stock number** – This option adds the Patron ID to the end of the created stock number.

- **Class** – Select the Stock Class where the new Stock Certificates will be created. The default values for *Dividend Bearing, Dividend Rate, Interest Bearing, Interest Rate*, and *$ Value/Share* default to the new Stock Certificates from this selected Stock Class. This is a mandatory entry field.

- **Date Issued** – Enter the date to be recorded on the Stock Certificate as the date issued.

- **$ per Share** – Enter the dollar amount per share for each new Stock Certificate. This is a mandatory entry field.

- **Certificate Append Info** – Enter the alpha/numeric prefix or suffix to be added to the Patron ID to make the Stock Certificate number (9 characters maximum). This is a mandatory field.
  Note: If a Stock Class is set to *Auto Number*, this field is not available.

- **Post** – Selecting **Post** generates a new batch of Stock Certificates based on the information provided. The posting scans for any Stock Certificates that exist in the *To* class and checks to see that no Stock Certificate

number will be duplicated by the process. If potential duplication exists, a warning is given and the posting process is terminated without producing any new certificates. If the *To* class has been set for one certificate per Customer for this class, the posting process verifies that the creation of the new certificates will not create a second certificate for any Patron for this class. If any Patron already has a certificate for this class and the Batch Make Stocks utility will produce a second certificate, a warning is given and new a certificate will not be generated for the Patrons involved. New certificates are generated for all other Patrons selected. Also, if the length of the certificate number will exceed the 15 character limit, the process is stopped.

Note: The new Stock Certificates generated by the Batch Make Stocks function are assigned *Stock Certificate #s* (IDs) consisting of two components. One part of the alpha/numeric Stock ID uses the Patron ID. The second part uses the prefix or suffix entered in the *Certificate Append Info* area.