

**Edit Share Certificates**

Dear users,

Greetings of the Day!,

We have added the “**maker & checker**” facility in the issuance of share certificates at the time of allotment.

When the share certificates are created at the allotment window, that data will be saved temporarily and you can edit the same. Once the same is finalized you can approve and save in the main database, after which you will not be able to edit.

**Add Certificates & Approve:**

***Dashboard ⇒ Client ⇒ Compliance Manager ⇒ Master ⇒ Shareholder ⇒ Shareholder Management ⇒ Share Allotment***

After making an allotment click on the date of allotment and then add share certificates. Once you have added the certificates for approval you have to go to the Edit window as shown in the below image:

30/06/2023	Right Issue	Class A Equity Shares with Voting Rights	1	PAS-3 MGT-14			
Name of Allottee	Original Offered Quantity	Remark	Allotted Quantity	Share Certificate			
Bhumika Kataria	10,000	Accepted Quantity (10000)	10,000	<a href="#">Edit Details</a>			



Sl.No	Denomination of Share per Certificate	Certificate No.	Distinctive No.
1	10000	11	20501-30500
<input type="button" value="Submit"/> <input type="button" value="Approve &amp; Save in Database"/>			

**Role permission for approval:**

The approval access is by default given to the administrator only. You can give this access to any other team member also following these instructions:

**Dashboard -> Settings -> Access Permission -> Roles**

From this window, click on the name of any role to which you wish to give this access. At the bottom, you will find “**Can approve and finalize share certificates**”, select yes and save.