

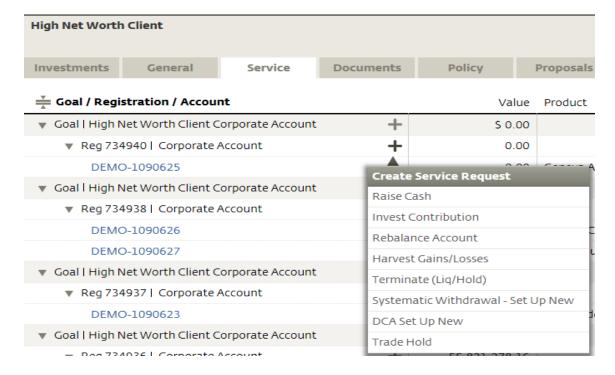
TRADE HOLD

1. Search for the account via Quick Search or Client Tab



## 2. Navigate to the Service Tab

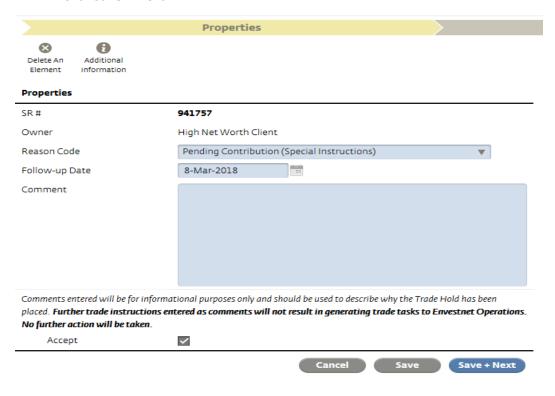
- Click the "+" icon next to the registration from which you are raising cash
- Select Trade Hold





TRADE HOLD

- 3. <u>Properties</u>: Enter the Reason Code, Follow-up Date, & Comment
  - Check Accept
  - Click Save + Next



## 4. Options:

- Click Edit
- Check the box to Enable Trade Hold (or Disable Trade Hold if disabling).
- Click Save + Next



## 5. Review & Submit:

• Click Submit Request



TRADE HOLD