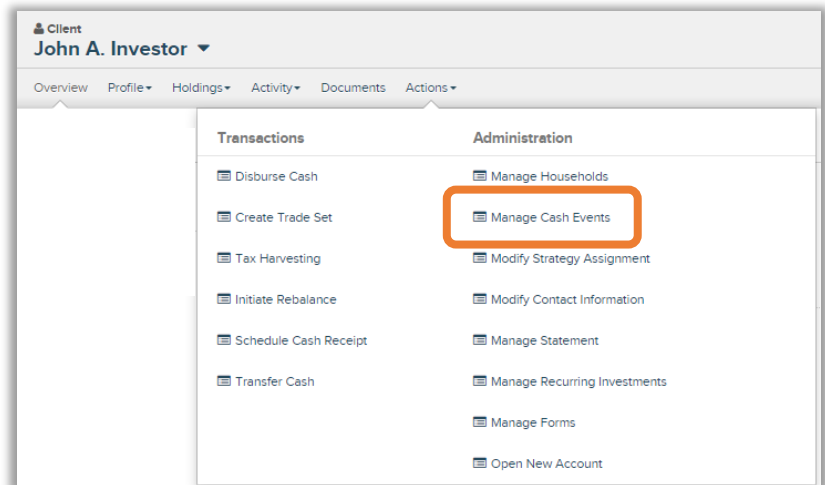# Manage Cash Events Guide.

Use of Feature

The **Manage Cash Events** action allows you to modify or delete a recurring cash event, while seeing a side by side comparison of what you are modifying. Available recurring events include Cash Distributions, Cash Transfers, and Cash Receipts
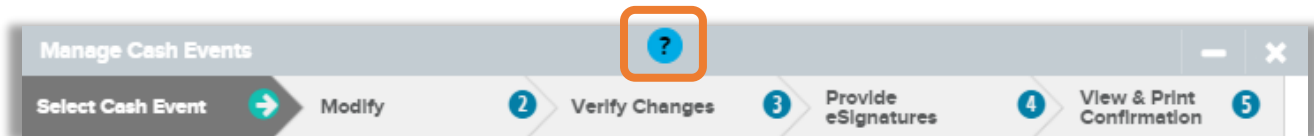
Navigating to Manage Cash Events

From your **Client/Account** page you can access the **Manage Cash Events** action from the Actions dropdown.

Action Help

To access **Action Help** on Manage Cash Events, select the "?" icon within the header bar of the action window. Four options will be presented for the Action Guide, a Guided Tour, Best Practice information, and a Video Walk-Thru.
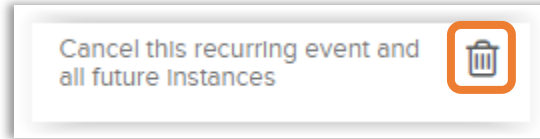
Select Cash Event

A list of the available recurring cash events will display with additional details. Select an event to modify or delete by selecting the circle button to the left of the event.
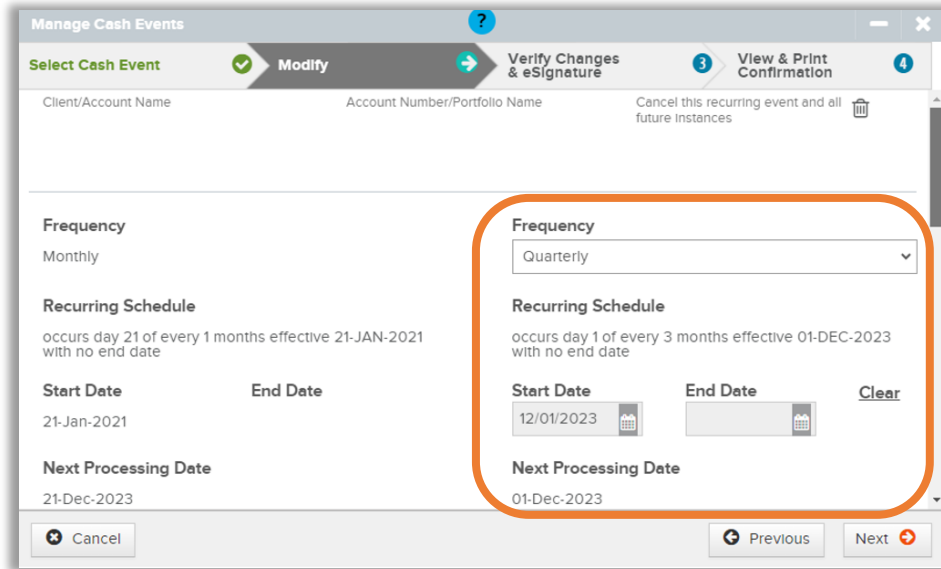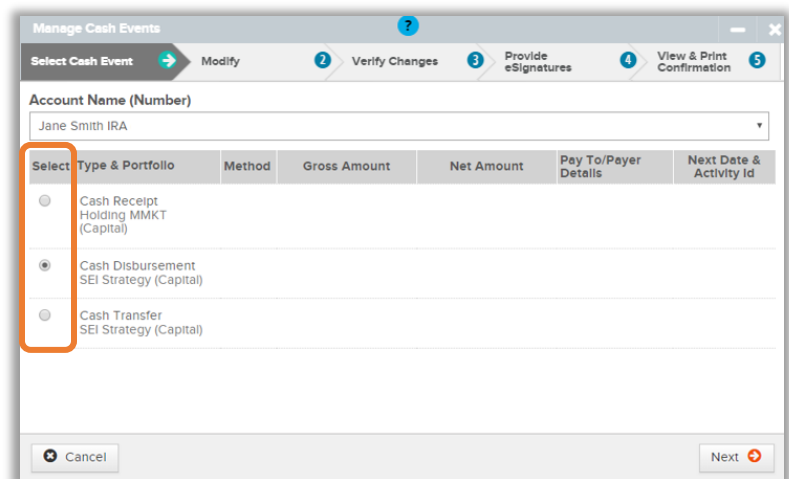
Delete

Delete an Event – Select the trashcan icon in the upper right hand corner to cancel this recurring event and all future instances.
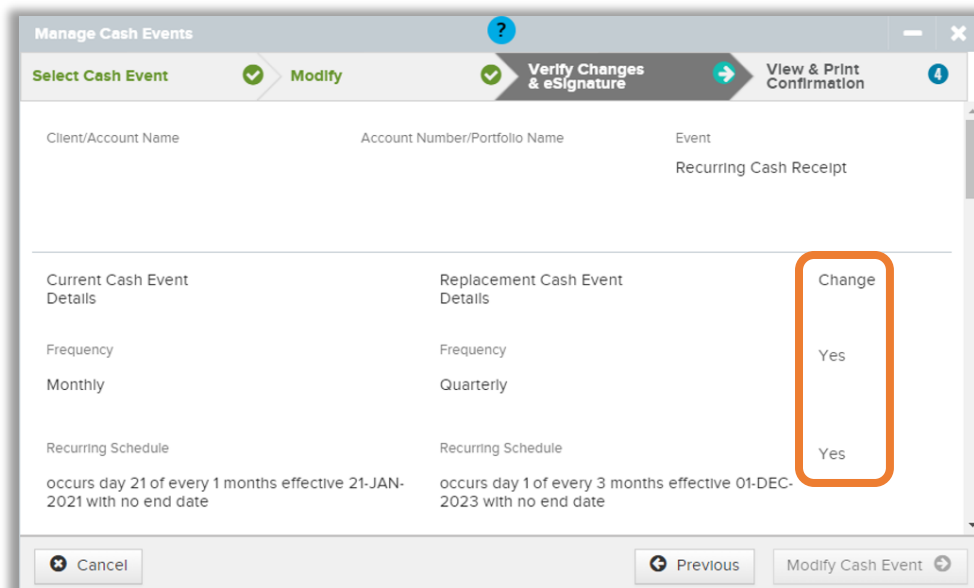

Modify

Modify an Event – The left column will display the current details of the recurring cash event. The right column will display the editable fields, which can be modified for the cash event. The Frequency, End Date, Distribution Amount, Waive Federal and State Withholding, Total Distribution Amount, Distribution Reason and Treatment Code can be edited.

Verify Changes

Use the **Verify Changes** page to confirm the information that you entered. The farthest right hand column will display a Yes/No for details that have been changed/modified.
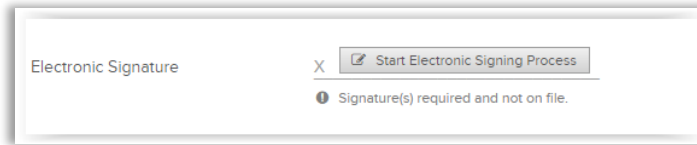
Provide eSignatures

The **Manage Cash Events** action may require an electronic signature. Follow the **Start Electronic Signing Process** steps to prepare who will receive the DocuSign generated email. The **Manage Cash Events** action does use the **Knowledge Based Questions** as a part of the DocuSign process.

Additional information about the DocuSign process can be found within the "?" icon at that top of the Schedule Cash Receipt action or by searching "DocuSign" from within the Keyword Search field of the Help Menu.

Modifying a **Cash Disbursement** that requires a client signature will check to see if the Standing Authorization is on file, which would mean that a client signature would not be needed.

Modifying a **Cash Receipt** that requires a client signature will check to see if the Standing Authorization is on file, which would mean that a client signature would not be needed.

Modifying a **Cash Transfer** will depend on the type of transfer. If the transfer is within the account (portfolio to portfolio) no client signature is required, however if the transfer is between accounts, then this will follow if the Standing Authorization is on file.