

TRUST SERVICE TRAINING - LEVEL 1

SESSION 1.3

ADDING COMPANY

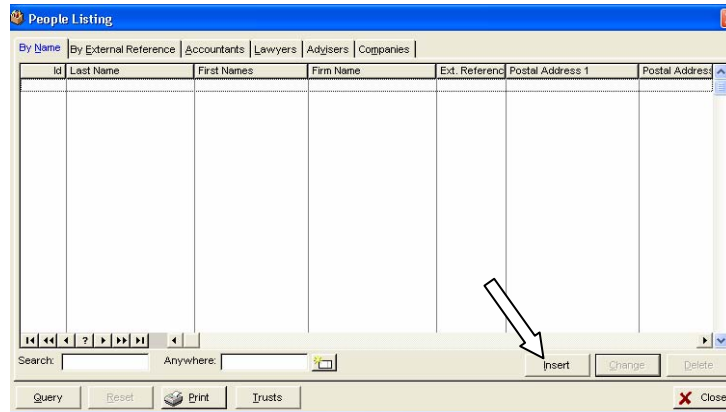
Note: Before Adding Company, Add all Company Directors as 'People'. You will need this information to add the Company

Select People



The screenshot shows the 'Trust Maintenance' window for 'CCH LEARNING TRUST'. The 'General' tab is active. The 'Trust Type' is set to 'Family Trust' and the 'Manager' is 'ANDREW'. The 'People' button is highlighted with a white arrow pointing to it from the right.

Select Insert/Company



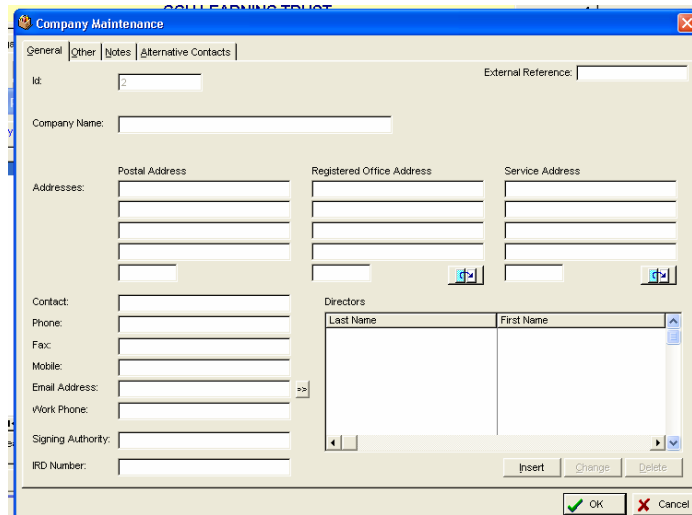
The screenshot shows the 'People Listing' window. The 'Companies' tab is selected. The table below is empty. The 'Insert' button at the bottom right is highlighted with a white arrow pointing to it from the right.

Id	Last Name	First Names	Firm Name	Ext. Referenc	Postal Address 1	Postal Address



The screenshot shows a 'Manager' dialog box with the question 'Person or Company?'. The 'Company' button is highlighted with a white arrow pointing to it from the right.

Opens Company Screen

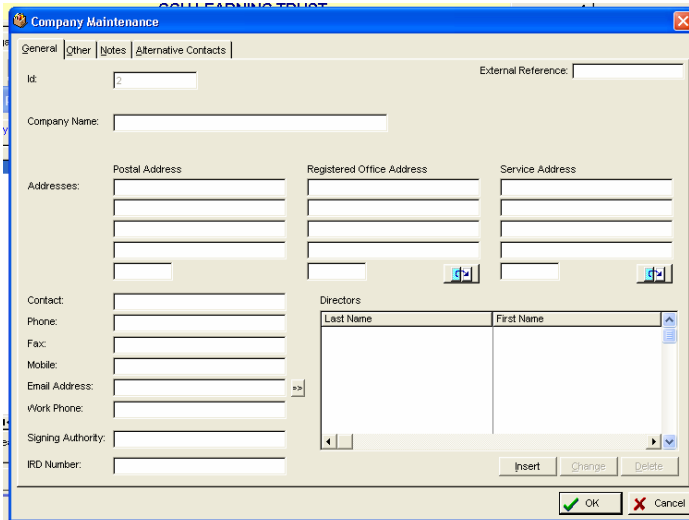


The screenshot shows the 'Company Maintenance' window. The 'General' tab is active. Fields include 'Id', 'External Reference', 'Company Name', 'Addresses' (Postal, Registered Office, Service), 'Contact' (Phone, Fax, Mobile, Email, Work Phone), 'Signing Authority', and 'IRD Number'. A 'Directors' table is also visible.

Director	Last Name	First Name

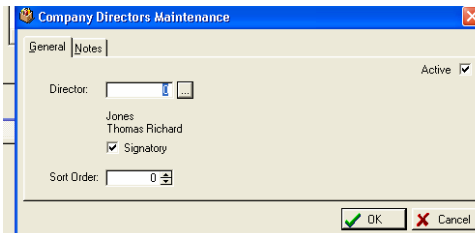
GENERAL

Complete all required fields



Note: You may have a link to Lawbase or MYOB. This will allow you to import client details directly. If you do not have this feature but would like to discuss it please contact your Account Manager for more details

Select Insert to add Directors



Select the Square to find the Directors names you should have added already.
Sort Order will determine which order their signatures appear on documents, 1 will be first
Select Signatory or not
You can add notes if required
You can select Active/Inactive as appropriate. Use this if someone becomes inactive as a company direct rather than removing their record completely

OTHER TAB / NOTES / ALTERNATIVE CONTACTS

All exactly the same as People

CLICK OK TO SAVE

