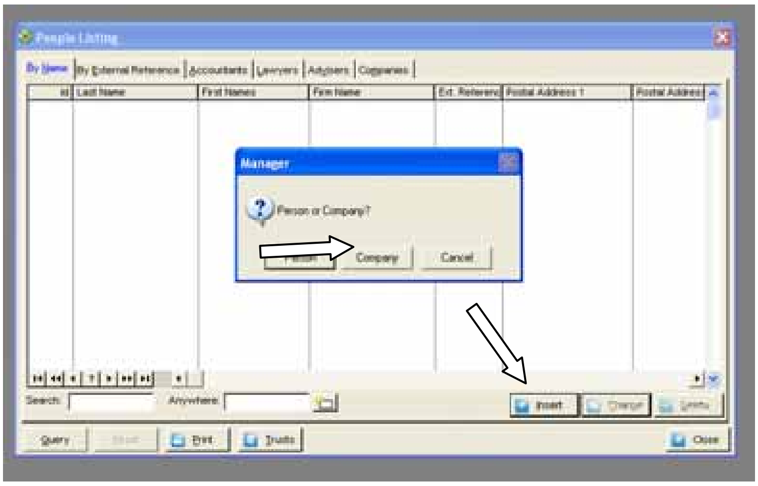
ADDING A COMPANY

The following instructions describe how to add a company.

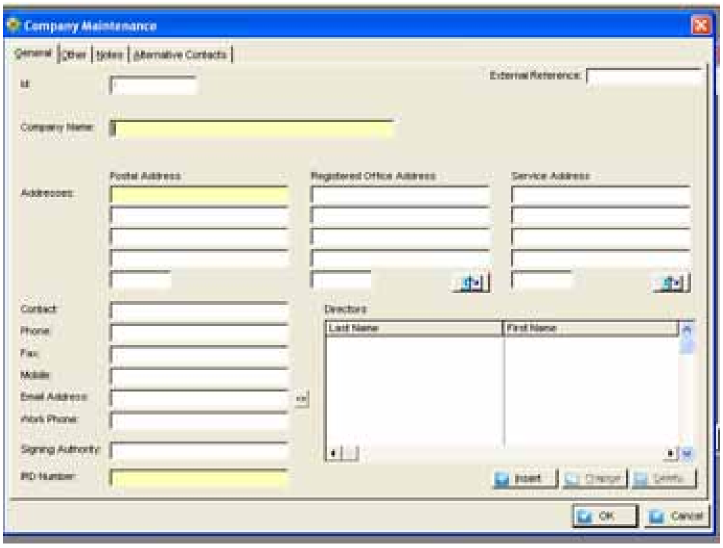
From within Trust Maintenance

Select People

Select Insert > Company



Opens Company Screen



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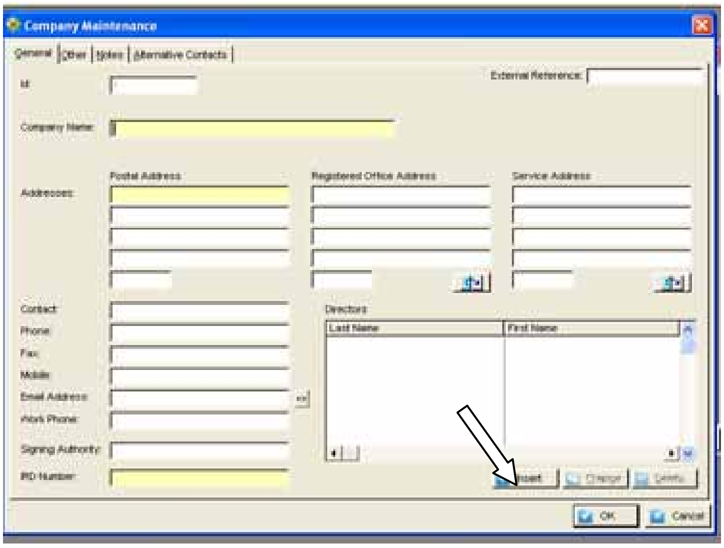
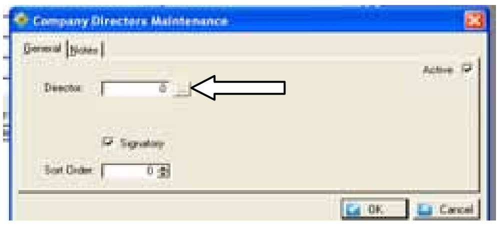
GENERAL

Any mandatory fields will be highlighted in Yellow. You cannot save a Company Record until all mandatory fields have been completed. To learn more about setting mandatory fields see notes on Session 7

Complete all required fields



Select Insert to add Directors



Select the Button Square next to the Directors field to find the Directors Name. If the Director is not on the People List, follow the instruction on Adding a Person.
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