





Company Registers Master Lists

Quick guide to using the Company Registers master lists.

We'll be adding an auditor for this demo, so open a company and go to the Officers page. Click the edit button on the record you want to add to the master list.


The screenshot displays the 'Company' interface with a dropdown menu. The 'Officers' section is expanded to show 'Auditors'. A table lists one auditor record with columns for Date, Auditor Firm, Nature of Change, Appointment As, and Tasks. The edit button (pencil icon) in the Tasks column is highlighted with a blue square. Below the table are buttons for '+ Add New Appoint/Resign/Change' and 'Print Register'. The 'Public Officers' and 'Company Secretaries' sections are also visible, each with a 'No' status, '+ Add New Appoint/Resign/Change' button, and 'Print Register' button. An 'OK' button is at the bottom left.

Date	Auditor Firm	Nature of Change	Appointment As	Tasks
8/11/2016	My Audit Firm	Appointment	Auditor	   


Company Registers Master Lists


Click Copy to list to add the record to the master list.

Update Auditors

Copy from List:  **Copy to List**

Appointment As: **Auditor**

Date Changed:  dd/mm/yyyy

Effective Date:  dd/mm/yyyy

Firm:

Reg/Pract. No: If firm or juristic person

Individual Name: If section 90(3) applicable




Address:

Nature of Change: **Appointment** Resignation Name Change Address Change

Signatory:

If you go to the My Acc Officers / Auditors page in the Master List menu you can see the record in your master list.

Accounting Officers / Auditors List

▲ Firm	Registration No	Former Name	Individual Name	Nature of Change	Appointment As			
My Audit Firm	2354235432		Carl Robinson	Appointment	Auditor			





Company Registers Master Lists

Open the company you want to add a new Officer to, and go to the Offices page. Click Add New Appoint/Resign/Change.


CC

Officers

Accounting Officers / Auditors

▲ Date	Auditor Firm	Nature of Change	Appointment As	Tasks
14/09/2016	New Accounting Officer	Appointment	Auditor	   


+ Add New Appoint/Resign/Change

 **Print Register**

Public Officers

No Public Officers

+ Add New Appoint/Resign/Change

 **Print Register**

Company Registers Master Lists

Click the Lookup button.

Update Accounting Officers / Auditors

Copy from List:

Appointment As:

Date Changed: dd/mm/yyyy

Effective Date: dd/mm/yyyy

Firm:

Reg/Pract. No: If firm or juristic person

Individual Name: If section 90(3) applicable

Address:

Nature of Change:

Click the Select button on the record you want to use.

Select

▲ Firm	Registration No	Former Name	Individual Name	Nature of Change	Appointment As	<input type="checkbox"/>
My Audit Firm	2354235432		Carl Robinson	Appointment	Auditor	<input checked="" type="checkbox"/>

Company Registers Master Lists

All the details of your auditor will pull through from your master list record, and you can just click Save to finish.

Update Accounting Officers / Auditors

Copy from List:

Appointment As:

Date Changed: dd/mm/yyyy

Effective Date: dd/mm/yyyy

Firm:

Reg/Pract. No: If firm or juristic person

Individual Name: If section 90(3) applicable

Address:

Nature of Change:

CC

Officers

Accounting Officers / Auditors

Date	Auditor Firm	Nature of Change	Appointment As	Tasks			
14/09/2016	New Accounting Officer	Appointment	Auditor				
8/11/2016	My Audit Firm	Appointment	Auditor				

+ Add New Appoint/Resign/Change

Print Register

Public Officers

No Public Officers

+ Add New Appoint/Resign/Change

Print Register